

990-PF

Return of Private Foundation

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

OMB No 1545-0052

Do not enter social security numbers on this form as it may be made public. Department of the Treasury Go to www.irs.gov/Form990PF for instructions and the latest information. Open to Public Inspection For calendar year 2017 or tax year beginning and ending Name of foundation A Employer identification number RICHARD H SIMONS CHARITABLE TRUST Number and street (or PO box number if mail is not delivered to street address) Room/suite 59-7034786 4000 HOLLYWOOD BLVD 485 SOUTH B Telephone number (see instructions) City or town, state or province, country, and ZIP or foreign postal code **HOLLYWOOD** 33021 954-966-2112 Foreign country name Foreign province/state/county Foreign postal code C If exemption application is pending, check here G Check all that apply Initial return Initial return of a former public charity D 1. Foreign organizations, check here Final return Amended return Foreign organizations meeting the 85% test, Address change Name change check here and attach computation Section 501(c)(3) exempt private foundation H Check type of organization E If private foundation status was terminated under section 507(b)(1)(A), check here J Accounting method X Cash Accrual Fair market value of all assets at If the foundation is in a 60-month termination end of year (from Part II, col (c), Other (specify) under section 507(b)(1)(B), check here line 16) > \$ 3.248,033 (Part I, column (d) must be on cash basis.) (d) Disbursements Part I Analysis of Revenue and Expenses (The total of (a) Revenue and (b) Net investment (c) Adjusted net for charitable amounts in columns (b), (c), and (d) may not necessarily expenses per income purposes books equal the amounts in column (a) (see instructions)) Contributions, gifts, grants, etc , received (attach schedule) 2 Check ► ☐ if the foundation is **not** required to attach Sch B 3 Interest on savings and temporary cash investments 2,359 2,359 30,162 30,162 4 Dividends and interest from securities 5a Gross rents b Net rental income or (loss) Net gain or (loss) from sale of assets not on line 10 Revenue 6a Gross sales price for all assets on line 6a 407.392 11.390 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain 9 Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold Gross profit or (loss) (attach schedule) 526,596 526,596 11 Other income (attach schedule) . 570,507 570.507 12 Total. Add lines 1 through 11 204,000 40,800 163,200 13 Compensation of officers, directors, trustees, etc. Expenses 3,600 720 2 880 14 Other employee salaries and wages Pension plans, employee benefits 7,295 29,181 36,476 15 16a Legal fees (attach schedule) 8,000 10,000 2,000 Accounting fees (attach schedule) Other professional fees (attacheschedule) **Administrative** 9,198 2,299 11,497 17 12,692 2,538 10,154 Taxes (attach schedule) (see Instructions) 18 19 Depreciation (attach schedule) and depletion 20 Occupancy 21 Travel, conferences, and meetings and 22 Printing and publications 121 97 24 23 Other expenses (attach schedule) Operating 24 Total operating and administrative expenses. 278,386 55,676 222,710 Add lines 13 through 23 75,432 75,432 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 298,142 353.818 55 676 27 Subtract line 26 from line 12 Excess of revenue over expenses and disbursements . 216.689 514,831 Net investment income (if negative, enter -0-) . .

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

		Polance Shoots Attached schedules and amounts in the description column	Beginning of year	End of year			
12	art II	Balance Sheets should be for end-of-year amounts only. (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value		
	1	Cash—non-interest-bearing					
	2	Savings and temporary cash investments	207,275	360,852	360,852		
	3	Accounts receivable ▶					
	[Less allowance for doubtful accounts ▶		Annual States and annual states and a state of the state	Parama de didita successi di di		
	4	Pledges receivable ▶					
		Less allowance for doubtful accounts ▶		The state of the s			
	5	Grants receivable .					
	6	Receivables due from officers, directors, trustees, and other					
	1	disqualified persons (attach schedule) (see instructions) .					
	7	Other notes and loans receivable (attach schedule)					
i	1	Less: allowance for doubtful accounts					
ts	8	Inventories for sale or use .					
Assets	9	Prepaid expenses and deferred charges					
څ	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule)	949,316	1,346,836	1,698,083		
	С	Investments—corporate bonds (attach schedule)	34,407				
	11	Investments—land, buildings, and equipment basis					
		Less accumulated depreciation (attach schedule) ▶					
	12	Investments—mortgage loans .					
	13	Investments—other (attach schedule)	1,759,719	1,459,719	1,189,098		
	14	Land, buildings, and equipment, basis					
	{	Less accumulated depreciation (attach schedule)	<u> </u>				
	15	Other assets (describe ► PREPAID INCOME TAX)	417	417			
	16	Total assets (to be completed by all filers—see the)				
		instructions Also, see page 1, item I)	2,951,134	3,167,824	3,248,033		
	17	Accounts payable and accrued expenses					
Ś	18	Grants payable					
Ħ	19	Deferred revenue					
Liabilitles	20	Loans from officers, directors, trustees, and other disqualified persons					
Ë	21	Mortgages and other notes payable (attach schedule)	ļ				
_	22	Other liabilities (describe)					
	23	Total liabilities (add lines 17 through 22)	0	0			
S		Foundations that follow SFAS 117, check here					
ည		and complete lines 24 through 26, and lines 30 and 31.					
Balances	24	Unrestricted	ļ				
Ba	25	Temporarily restricted .					
Fund	26	Permanently restricted .					
3		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.	ł				
5	27	Capital stock, trust principal, or current funds	2,951,134	3,167,824			
Š	27 28	Paid-in or capital surplus, or land, bldg., and equipment fund	2,951,154	3, 107,024			
Net Assets	29	Retained earnings, accumulated income, endowment, or other funds					
As	30	Total net assets or fund balances (see instructions)	2,951,134	3,167,824			
et	31	Total liabilities and net assets/fund balances (see	2,301,104	0,107,024			
Ž	31	instructions)	2,951,134	3,167,824			
D-	art III	Analysis of Changes in Net Assets or Fund Balances	2,301,134	0, 107,024	LINE THOUSE & BASTING TO ME AND A		
		net assets or fund balances at beginning of year—Part II, column (a)	. line 30 (must agree	with			
•		of-year figure reported on prior year's return)	., 05 (mast agree	""	2,951,134		
,		amount from Part I, line 27a	•	2	216,689		
		rincreases not included in line 2 (itemize) ROUNDING		3	1		
		ines 1, 2, and 3		. 4	3,167,824		
5		eases not included in line 2 (itemize)		5			
	Total	net assets or fund balances at end of year (line 4 minus line 5)—Par	t II, column (b), line 3	0 6	3,167,824		

Part	a) List and describe the ki	ILOSSES for Tax on Investm nd(s) of property sold (for example, real esta use, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	d (d) Date sold (mo , day, yr)
1a	PER SCHEDULE ATTACH	1ED		Dollaron		
b						
<u>c</u>				l		
<u>d</u> e				 		
		(f) Depreciation allowed	(a) Cost or	other basis		Gain or (loss)
	(e) Gross sales price	(or allowable)		nse of sale		us (f) minus (g))
a	407,392			396,002		11,390
b						
<u>c</u>						
<u>d</u> e						
	Complete only for assets sh	nowing gain in column (h) and owned	by the foundation	on 12/31/69		
	(i) FM V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Exces	ss of col (ı) (ı), ıf any	col (k), bu	(Col. (h) gain minus t not less than -0-) or es (from col. (h))
a						11,390
b						
<u>c</u>						
<u>d</u>						
e	<u>. </u>	(If gain	also enter in Par	t Line 7		
2	Capital gain net income or	(nercanitatioss) (enter -0- in Par	7 1	2	11,390
3	Net short-term capital gair	or (loss) as defined in sections 1		Ī		
	•	line 8, column (c) See instruction	ns If (loss), ente	er-0- in }		
	Part I, line 8		 	J	3	0
Part		der Section 4940(e) for Reduvate foundations subject to the sec				
Was 1		re this part blank section 4942 tax on the distributat ualify under section 4940(e). Do no			period?	☐ Yes ☒ No
1	Enter the appropriate amo	unt in each column for each year;	see the instruct	ions before making	g any entries	
Cal	(a) Base period years endar year (or tax year beginning in	(b) Adjusted qualifying distributions	Net value o	(c) of nonchantable-use ass	sets (col	(d) Distribution ratio (b) divided by col (c))
	2016		1,331	3,033		0.102630
	2015		0,857	3,231		0 099285
	2014		3,215 2,372	3,429 3,608		0 095132 0.089337
	2013 2012		9,241	3,815		0.083660
	2012		<u>,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,</u>	9,0.0	'	
2	Total of line 1, column (d)				2	0 470044
3		for the 5-year base period—divide bundation has been in existence if			3	0 094009
4	Enter the net value of non	charitable-use assets for 2017 fro	m Part X, line 5		4	2,884,180
5	Multiply line 4 by line 3					271,139
6	Enter 1% of net investmen	nt income (1% of Part I, line 27b)			6	5,148
7	Add lines 5 and 6				7	276,287
8	Enter qualifying distribution	ons from Part XII, line 4	 art VI, line 1b, a	 nd complete that p	8 part using a 1%	298,142 tax rate. See the
	Part VI instructions					Form 990-PF (2017)

-orm 9	10-PF (2017) RICHARD H SIMONS CHARITABLE TRUST					9-7034	786	F	age 4
Part	VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b)	o), 494	10(e), or 4948—sec	ins	tructi	ons)			
1a			ter "N/A" on line 1	1			SEPTEMBER SEPTEM		A .,.
	Date of ruling or determination letter (attach copy of letter if nec			1					3
b	Domestic foundations that meet the section 4940(e) requirements in Part \	-		}	1	- Commission of the	5	,148	ľ. <i>(</i>
	here ▶ X and enter 1% of Part I, line 27b			1		572.11		Trans.	12 ×
C	All other domestic foundations enter 2% of line 27b Exempt foreign organi	zation	ns, enter 4% of	- }					4 2 4 4 5 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
	Part I, line 12, col. (b)			,	1	A CONTRACTOR OF THE PARTY OF TH	-Especial	Tr. 74	
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations	s only.	others, enter -0-)		2	İ		0	
3	Add lines 1 and 2	,	,		3	 	5.	148	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundation	s only.	others, enter -0-)		4	1			
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-								
6	Credits/Payments								7.7. × ×
а	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	1,261						1 5 m
ь	Exempt foreign organizations—tax withheld at source	6b	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,						A., 4
c	Tax paid with application for extension of time to file (Form 8868)	6c							Sti
ď	Backup withholding erroneously withheld .	6d							1040 m
7	Total credits and payments Add lines 6a through 6d		L		7	2 380.1902:1641	(केस्ट्रेड्ड) 1	261	د, ،
8		Earm	2220 is attached		8	 		,201	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owe		2220 is attached	•	9	 		887	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the am		overnaid		10	 		0	
11	Enter the amount of line 10 to be Credited to 2018 estimated tax	Juni	Refunded		11	 		0	
	VII-A Statements Regarding Activities		110.0.1.00		···	<u></u>			
1a	During the tax year, did the foundation attempt to influence any national, st	ate o	r local legislation or	did	ıt.	128		Yes	No
ıa		ate, o	i local legislation of	aia	ıı		1a	163	×
_	participate or intervene in any political campaign?								
D	b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the								V
	instructions for the definition							G 7987.	_ <u>X</u> _
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activity	ties ar	nd copies of any ma	iteria	ils				,
	published or distributed by the foundation in connection with the activities						及以下 1c	\$.V%. \$1	2 ² 4,
C	•							ال يونونون	X
d								SA.	
	(1) On the foundation > \$ (2) On foundation man								2 .
e	Enter the reimbursement (if any) paid by the foundation during the year for	politic	cal expenditure tax	ımpc	sed				2
	on foundation managers > \$					3			17 A
2	Has the foundation engaged in any activities that have not previously been	repoi	rted to the IRS?			· _	2	3000	X
	If "Yes," attach a detailed description of the activities					1			
3	Has the foundation made any changes, not previously reported to the IRS, in its gi			3) i			*/** -
	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conform					L	3		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more	re dur	ing the year? .			-	4a		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?					<u> </u>	4b	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction	during	the year?				5		X
	If "Yes," attach the statement required by General Instruction T					200			4.
6	Are the requirements of section 508(e) (relating to sections 4941 through 4	1945) :	satisfied either			8		3	
	By language in the governing instrument, or								
	By state legislation that effectively amends the governing instrument so t	hat no	mandatory direction	ons ti	hat	13			
	conflict with the state law remain in the governing instrument?					<u> </u>	6	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," co	mplete	Part II, col (c), and Pa	rt XV		r	7	X	
8а	Enter the states to which the foundation reports or with which it is registere			•		S	225 Z	製品	Silver.
Ju	FL								
L	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form	n gan	PF to the Attorney	Gen	eral				
ь				J-11	o, ai	128	86 86	ESSEPT X	;•#4.7≥!
_	(or designate) of each state as required by General Instruction G? If "No,"			1261	(3)		, 1888 F	<u> </u>	游
9	Is the foundation claiming status as a private operating foundation within the					120	第 案制	ere	riffer
	or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? Sec	e the i	nstructions for Part	ΧIV	II	}	<u>,</u>		v
	"Yes," complete Part XIV					 -	9		X
10	Did any persons become substantial contributors during the tax year? If "Y	es," a	ttach a schedule lis	ting	their	İ	.		
	names and addresses .	٠	<u> </u>				10		X

11 At any time during the year, did the foundation, directly, or indirectly, own a controlled entity within the the meaning of section 512(b)(13) at 1"exe; attach schedule See instructions. 12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privilege? 1"1"ex." affaith statement See instructions. 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? WebSte address. ▶ NA. 14 The books are in care of ▶ ROBERT M. KRAMER, ESQ. Telephone no ▶ 954-966-2112 15 Section 4947(a)(1) nonexempt charibide trust stilling from 990-PF in lieu of Form 1041—check here 15 15 3021. 16 At any time during calendary year 2017, did the foundation have an interest in or a significant or other authority over a bank, securities, or other financial account in a foreign country? 16 Set time foreign country. ▶ Telephone no ▶ 954-966-2112 17 Statements Regarding Activities for Which Form 4720 May Be Required 18 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 During the year, dut the boundation (letter directly or indirectly). 10 Engage in the sale or exchange, or leasing of property with a disqualified person? 20 Borrow money from lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? 3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? 3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? 4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 3) Furnish goods, services, or disclinities to (or accept them from) a disqualified person? 4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 5) For the benefit or use of a disqualified person or a disqualified person or a disqualified person o	Part	VII-A Statements Regarding Activities (continued)						
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. 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 14 The books are in care of ▶ ROBERT M. KRAMER_ESQ. Telephone no ▶ 964-996-2112. 15 Section 4947(3(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 and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of trax-exempt interest received or accrued during the year and enter the amount of trax-exempt interest received or accrued during the year and enter the during claim year year 2017, and the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 16 All any time during claim the state or exchange, or leasing of property with a disqualified person?	11		對理	Yes	No			
person had advisory privileges? If "Yes," station statement. See instructions Did the foundation comply with the public respection requirements for its annual returns and exemption application? Website address. ▶ N/A. 14 The books are in care of ▶ ROBERT M. KRAMER_ESQ. Telephone no ▶ 954-956-21/2. Located at ▶ 4000 HOLLY/WOOD GOULEVARD 485 S HOLLY/WOOD FI. 15 Section 4947(a)(1) nonexempt charitable trusts filing from 990-PF in leu of Form 1041—check here and enter the amount of tax-exempt interies received or accured during the year 16 Al 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 foregin country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country. ▶ Part VILB Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any ltem is checked in the "Yes" column, unless an exception applies. 1a During the foreign country. ▶ Part VILB Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any ltem is checked in the "Yes" column, unless an exception applies. 1a During the foreign country. ▶ Part VILB Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any ltem is checked in the "Yes" column, unless an exception applies. 1a During the foreign country. ▶ Part VILB Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any ltem is checked in the "Yes" column, unless an exception applies. 1b Carried File Form 4720 if any ltem is checked in the "Yes" column, unless an exception applies. 1c During the foreign country. ▶ Part VILB Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any ltem is checked in the "Yes" column, unless an exception applies. 1c During the foreign country. ▶ 1d Part Statements Regarding Activities of Which Form 4720 May Be Re			11		X			
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	12	·	1 1					
Website address ▶ NA. 14 The books are in care of ▶ ROBERT M. KRAMER, ESO Telephone no ▶ 954-956-2112 15 Section 4947(a)(1) nonexempt chantable trusts fling Form 990-PF in lieu of Form 1041—check here and enter the amount of tax-exempt interest received or accrued during the year 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 Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 17 During the year, did the foundation of telefic directly or indirectly? 18 During the year, did the foundation (either directly or indirectly) 19 Engage in the sale or exchange, or leasing of property with a disqualified person?			_		X			
14 The books are in care of ► ROBERT M. KRAMER, ESO Located at ► 4000 HOLLYWOOD BOULEVARD 485 S HOLLYWOOD FL Section 4947(a)(1) nonexempt charitable trusts fling Form 990-PF in lieu of Form 1041—check here and emiter the amount of tax-exempt interest received or accrued during the year A any time during calendary year 2017, dut the foundation have an interest at mor 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 mane of the foreign country. Fart 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) (1) Engage in the sale or exchange, or leasing of property with a disqualified person?	13		13	_X_				
Located at M. 4000 HOLLYWOOD BOUL EVARID 465 S HOLLYWOOD FI. 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—check here and enter the amount of lax-exempt interest received or accrued during the year 16 At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 16 See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country.								
Section 4947(a)(1) nonexempt charitable trusts fling Form 990-PF in Neu of Form 1041—check here and enfer the amount of tax-exempt interest received or accrued during the year 16 Al 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 fligh grequirements for FinCEN Form 114. If "Yes," enter the name of the foreign country. Part VILS 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) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	14		-2112					
and enter the amount of tax-exempt interest received or accured during the year A any time during calendary very 2017, did the foundation have an interest in or a signature or other authority over a bank, secunities, or other financial account in a foreign country? See the instructions for exceptions and filling requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country. ▶ Part VII.B. Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 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?	45							
16 A lary 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. 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) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or large the supply of the part of either available for the benefit or use of a disqualified person) (or large the available for the benefit or use of a disqualified person) (or large) (or part of either available for the fundation agreed to make a grant to or to employ the official for a period affer termination of 10 (a) (1) (1) (1) (1) (1) (1) (1) (2) (2) (2) (2) (2) (2) (2) (2) (2)	15			,	- _			
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. Part VILS 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) (1) Engage in the sale or exchange, or leasing of property with a disqualified person?	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) (1) Engage in the sale or exchange, or leasing of property with a disqualified person?			16					
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) (1) Engage in the sale or exchange, or leasing of property with a disqualified person?		See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the	が記録					
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. Tourng the year, did the foundation (either directly or indirectly)					اري الله الله الله الله الله الله الله الله			
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b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its	A a				X			
chantable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017? 4b X	_	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its			100 (1) 100 (1)			
		charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b	لـيـا	X			

Part	VII-B	Statements Regarding Activities	for W	hich Form	4720 M	May Be Re	equire	d (contin	ued)		
5a		the year, did the foundation pay or incur any ry on propaganda, or otherwise attempt to i			section	4945(e))?		Yes	X No		
		ience the outcome of any specific public ele ctly or indirectly, any voter registration drive		see section 49	955), or	to carry on	i,	Yes	X No		
		vide a grant to an individual for travel, study					Yes	X No	7.43.42		
		vide a grant to an organization other than a tion 4945(d)(4)(A)? See instructions	charita	ble, etc , orga	anizatio	n described	l iù	Yes	∑ No		
		vide for any purpose other than religious, chooses, or for the prevention of cruelty to chi			terary, o	or education	nal	Yes	X No		
b	o If any answer is "Yes" to 5a(1)–(5), did any of the tr Regulations section 53 4945 or in a current notice r			•			•		nı b	5b	N/A
С	If the a	cations relying on a current notice regarding nswer is "Yes" to question 5a(4), does the for e it maintained expenditure responsibility for	oundation	on claım exen				Yes	► []		
6a	Did the	' attach the statement required by Regulation foundation, during the year, receive any fur rsonal benefit contract?				pay premiui	ms	Yes	⊠ No		
b		foundation, during the year, pay premiums, to 6b, file Form 8870	directly	y or indirectly,	on a p	ersonal ber	efit cor	ntract?	•	6b	X
7a b		me during the tax year, was the foundation a pa did the foundation receive any proceeds o					e trans	Yes	X No	7b	N/A
Part	VIII	Information About Officers, Direct and Contractors								iploye	:es,
1	List all	officers, directors, trustees, and foundat									
		(a) Name and address	hou	(b) Title, and average hours per week devoted to position (ff not paid enter -0-)		not paid,	(d) Contributions to employee benefit plans and deferred compensation		plans	(e) Expense account, other allowances	
	RT M KI HOLLYW	RAMER /OOD BLVD #485 SOUTH HOLLYWOOD	TRUS	TEE 15 00	204,000		34,00		34,001		
			ļ								
2	Compe "NONE	nsation of five highest-paid employees (."	other t	han those in	cluded	on line 1—	see ins	structions	s). If no	ne, ent	ter
	(a) Name	and address of each employee paid more than \$50,000		(b) Title, and a hours per w devoted to po	veek -	(c) Comper	nsation	(d) Contribi employee plans and o compens	benefit deferred		ense account, allowances
NONE											
							-				
Total	number	of other employees paid over \$50,000				·			>		
									F	orm 99	0-PF (2017)

	and Contractors (continued)	
3	Five highest-paid independent contractors for professional services. See instructions. If none, enter "NON	E."
	(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NONE		
		ļ
		
		1
		}
Fadal	number of others receiving over \$50,000 for professional services	
	Tamber of the forest ving that the forest for professional derivines	
Part	IX-A Summary of Direct Charitable Activities	
List t	he foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of	
	nizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 N	IOT APPLICABLE	
-		İ
		
2 _		}
-		
3 ~		
~		
4 .	·	
-		}
Par	IX-B Summary of Program-Related Investments (see instructions)	1
	cribe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
	NOT APPLICABLE	
_		1
-		
2 1	NOT APPLICABLE	1
-		
All o	ther program-related investments. See instructions	
3 1	NOT APPLICABLE	1
-		1
	Add lines 1 through 3	

Part 2	Minimum Investment Return (All domestic foundations must complete this part. Fore	ign foundat	ions,
	see instructions)		
1	Fair market value of assets not used (or held for use) directly in carrying out chantable, etc.,		
	purposes.		
	Average monthly fair market value of securities .	1a	2,697,651
	Average of monthly cash balances	1b	230,034
	Fair market value of all other assets (see instructions)	1c	417
d	Total (add lines 1a, b, and c) .	1d	2,928,102
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	2,928,102
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see	1 1	
	instructions)	4	43,922
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,884,180
6	Minimum investment return. Enter 5% of line 5 .	6	144,209
Part >	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating founda and certain foreign organizations, check here	tions	
1	Minimum investment return from Part X, line 6	1	144,209
2a	Tax on investment income for 2017 from Part VI, line 5	48	
b	Income tax for 2017. (This does not include the tax from Part VI.)		
С	Add lines 2a and 2b	2c	5,148
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	139,061
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	139,061
6	Deduction from distributable amount (see instructions) .	6	
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII,		
	line 1	7	139,061
Part	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	298,142
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,	2	
•	purposes		
3	Amounts set aside for specific charitable projects that satisfy the	3a	
a	Suitability test (prior IRS approval required)	3b	
b	Cash distribution test (attach the required schedule)	4	298,142
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	 	230,142
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income	5	5,148
_	Enter 1% of Part I, line 27b See instructions .	6	292,994
6	Adjusted qualifying distributions. 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 will qualifies for the section 4940(e) reduction of tax in those years		mation

Form 9	90-PF (2017) RICHARD H SIM(59-	7034786 Page 9
Part	XIII Undistributed Income	(see instructions	s)			
1	Distributable amount for 2017 from line 7	Part XI,	(a) Corpus	(b) Years pnor to 2016	(c) 2016	(d) 2017
2	Undistributed income, if any, as of the	and of 2017	POTENTIAL PROPERTY OF THE PROP			139,061
a	Enter amount for 2016 only	end of 2017			0	
b	Total for prior years 20	20 , 20				
3	Excess distributions carryover, if ar					
а	From 2012 .	130,225			a and a second	
b	From 2013 .	144,457				
C	From 2014	157,735	Production of the production o			
d	From 2015	161,173	经现代的证据的 医多种性性 医多种性 医多种性 医多种性 医多种性 医多种性 医多种性 医多种			
e	From 2016	162,177				
, i	Total of lines 3a through e Qualifying distributions for 2017 fro	m Rod VII	755,767			
•	line 4 ▶ \$ 298,142					
a	Applied to 2016, but not more than					
b	Applied to undistributed income of (Election required—see instruction:					
C	Treated as distributions out of corp required—see instructions)	us (Election				
d	Applied to 2017 distributable amou	nt .				139,061
е	Remaining amount distributed out	of corpus	159,081			
5	Excess distributions carryover appl					a Professional Action and territory
	(If an amount appears in column (d	• •				
6	amount must be shown in column (Enter the net total of each colum				ger (Artist Artist	
ь	indicated below:	n as				
а	Corpus Add lines 3f, 4c, and 4e S		914,848			
b	Pnor years' undistributed income S line 4b from line 2b	Subtract		0		
c	Enter the amount of prior years' un	distributed				
	income for which a notice of deficie	•				
	been issued, or on which the section	on 4942(a)				
	tax has been previously assessed					
ď	Subtract line 6c from line 6b Taxab	ole				
	amount—see instructions Undistributed income for 2016 Sub	ntract line		.		
	4a from line 2a Taxable amount—					
	instructions .				0	
f	Undistributed income for 2017 Sub	otract lines				
	4d and 5 from line 1. This amount i	must be				
	distributed in 2018		Par less " Land		314 4 46 44	0
7	Amounts treated as distributions or	•				
	to satisfy requirements imposed by				ا مراجع المنظمة المنظمة المنظمة المنظمة المنظمة المنظمة المنظمة المنظمة المنظمة المنظمة المنظمة المنظمة المنظمة المنظمة المنظمة	
	170(b)(1)(F) or 4942(g)(3) (Election required—see instructions)	i may be				
8	Excess distributions carryover from	2012 not				
•	applied on line 5 or line 7 (see instr		130,225			
9	Excess distributions carryover to					
	Subtract lines 7 and 8 from line 6a		784,623			
10	Analysis of line 9					
a	Excess from 2013	144,457	The state of the s			
b	Excess from 2014	157,735				
C	Excess from 2015 Excess from 2016	161,173 162,177	To the second second			
d e	Excess from 2017	159,081				
	LACESS HOITI 2017	109,001	E To Starte March	the same with a real of the same of the	PAT AN AN ANAMASKATANAN B	Form 990-PF (2017)

Form 9	90-PF (2017) RICHARD H. SIMONS	CHARITABLE TR	RUST		59-70	034786 Page 10
Part	XIV Private Operating Foundat	ions (see instru	ctions and Part \	/II-A, question 9		N/A
1a	If the foundation has received a ruling of	r determination let	tter that it is a priva	te operating		
	foundation, and the ruling is effective fo			▶		
b	Check box to indicate whether the foundation		ting foundation desc		4942(1)(3) or 4942(J)(5)
2a	Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years		(e) Total
	investment return from Part X for	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
ь	each year listed 85% of line 2a		 		 	0
c	Qualifying distributions from Part XII,		 	 	+-/	0
	line 4 for each year listed				/	0
d	Amounts included in line 2c not used directly for active conduct of exempt activities					0
е	Qualifying distributions made directly					
	for active conduct of exempt activities. Subtract line 2d from line 2c					0
3	Complete 3a, b, or c for the	1	1			
	alternative test relied upon			1		
а	"Assets" alternative test—enter			4		_
	(1) Value of all assets				 	0
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b	"Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					0
С	"Support" alternative test-enter			ļ	•	
	(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					0
	organizations as provided in section 4942(j)(3)(B)(III)					0
	(3) Largest amount of support from		1			
	an exempt organization	/		ļ	 	0
Part	(4) Gross investment income XV Supplementary Information	/Complete thi	o nort only if th	o foundation h	ad \$5,000 or mo	0
Part	any time during the year—			e loundation ii	au \$5,000 or mc	ne in assets at
1	Information Regarding Foundation M		3.)			
a	List any managers of the foundation wh before the close of any tax year (but only	o have contributed				e foundation
NON						
	List any managers of the foundation who wnership of a partnership or other enti-					on of the
NONI	_ , , ,	.,,				
2	Information Regarding Contribution,	Grant, Gift, Loan,	Scholarship, etc.	, Programs:		
	Check here ► 🔀 if the foundation on unsolicited requests for funds. If the four conditions, complete items 2a, b, c, and	ly makes contribut ndation makes gift	tions to preselected ts, grants, etc., to in	d charitable organ	izations and does n nizations under othe	ot accept er
a	The name, address, and telephone num			o whom applicatio	ns should be addre	ssed
						
b	The form in which applications should b	e submitted and ir	nformation and mat	enals they should	include	
С	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 (conting 3 Grants and Contributions Paid During	nued)			Page (1
3 Grants and Contributions Paid During	the Year or Approve	ed for Fut	ure Payment	
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
Name and address (home or business) a Paid during the year PER SCHEDULE ATTACHED	or substantial contributor	recipient	CHARITABLE	75,432
Total			▶ 3a	75,432
b Approved for future payment				
Total			<u>▶</u> 3b	0
			Form	990-PF (2017)

Ente	rt XVI-A Analysis of Income-Produc	onig Aduvidos				
_ 110	er gross amounts unless otherwise indicated	Unrelated bu	siness income	Excluded by sect	on 512, 513, or 514	(e)
		(a)	(b)	(c)	(d)	Related or exempt
1	Program convice revenue	Business code	Amount	Exclusion code	Amount	function income (See instructions)
,	Program service revenue			 		
	a			 		
	^			 		
	4			 		
	e			 		
	f	 }				
	g Fees and contracts from government agencie	PC -				
2	- <u> </u>					
3	Interest on savings and temporary cash investme	ents			2,359	
4	Dividends and interest from securities				30,162	
5	Net rental income or (loss) from real estate				MANUTAL STATE	The second second
	a Debt-financed property					
	b Not debt-financed property					
6	Net rental income or (loss) from personal pro	operty				
7	Other investment income					
8	Gain or (loss) from sales of assets other than invi-	entory			11,390	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory			<u> </u>		
11	Other revenue a ANNUITY INCOME		 	 	526,596	
	b			ļ		
	·			 		
	d			 		
12	Subtotal Add columns (b), (d), and (e)				570,507	0
	Total. Add line 12, columns (b), (d), and (e)				13	570,507
	e worksheet in line 13 instructions to verify cal-	culations \	•		13	370,307
		to the Accomplishme	ent of Exempl	Purposes		
_	rt XVI-B Relationship of Activities to the No. Explain below how each activity for whome activity for whome activity for whome activity for whome activity for whome activity for whome activity for whome activity for whome activity for whome activity for whome activity for whome activity for whome activity for whome activity for whome activities to the first form and the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities to the first form activities act	nich income is reported in co	olumn (e) of Part	(VI-A contributed	importantly to the	
Lin	rt XVI-B Relationship of Activities t	nich income is reported in co	olumn (e) of Part	(VI-A contributed	importantly to the es) (See instruction	ons)
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Print/Type preparer's name

ROBERT L WEINER

► ROBERT L WEINER CPA

Paid

Preparer Use Only

orm 95	10-PF		D H. SIMONS CHARI				59-7034786	Page 13
Part	XVI	Information Exempt Org		sfers to and Transaction	s and Ro	elationships With No	ncharitable	
1	in se	the organization d	directly or indirectly en	ngage in any of the following)(3) organizations) or in section			ed	Yes No
а	Trar (1) (orting foundation to a	a noncharitable exempt organ	nization of		1a(1) 1a(2)	X
b	Othe (1) :	er transactions Sales of assets to	a noncharitable exemets from a noncharitab	mpt organization ble exempt organization			1b(1)	X
	(3) I (4) I (5) I	Rental of facilities, Reimbursement ar Loans or loan guar	, equipment, or other a rrangements . rrantees	assets			1b(3) 1b(4) 1b(5)	X X X
c d	Sha If the	aring of facilities, ed e answer to any of the e of the goods, othe	quipment, mailing lists the above is "Yes," com er assets, or services gi	p or fundraising solicitations is, other assets, or paid emploiplete the following schedule Citiven by the reporting foundation int, show in column (d) the value.	Column (b) s n. If the four	indation received less than t	fair market	X
(a) Line		(b) Amount involved	(c) Name of nonch	haritable exempt organization		escription of transfers, transactions		ngements
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2a b	des	scribed in section 5		ated with, or related to, one or ction 501(c)(3)) or in section 5		exempt organizations	. Tyes	□ No
	<u>-"</u> -	(a) Name of organ		(b) Type of organization		(c) Description	n of relationship	 -
		(a) Hallio et et 3an-	1283011	(6) 1)75 51 51 51		<u> </u>	<u> </u>	
				 		 		
						 		
						 		
						 		
	Tun	der penalties of penjury, I dec	clare that I have examined this re	I eturn, including accompanying schedules and	statements, an	id to the best of my knowledge and beli	ef, it is true,	
Sign Here	соп	rect, and complete Declaration	tion of preparer (other than taxpay	eyer) is based on all information of which prep	oarer has any kn RUSTEE	owledge	May the IRS discuss with the preparer sho	

Preparer's signature

1800 NE 26TH STREET, WILTON MANORS, FL 33305

ROBERT L WEINER

PTIN

954-561-2040

Check X # PTIN P00547298

Firm's EIN ► 59-2731051

Date

5/11/2018

Phone no

Rati, Line (1990 HT) - Gain Loss from Sale of Assets Other Than Investory

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Part I, Line 11 (990-PF) - Other Income

	526,596	526,596	0
	Revenue		
	and Expenses	Net Investment	Adjusted
Description	per Books	Income	Net Income
1 ANNUITY INCOME	526,596	526,596	

Part I, Line 16b (990-PF) - Accounting Fees

	10,000	2,000	0	8,000
				Disbursements
ţ	Revenue and			for Charitable
<u>{</u>	Expenses per	Net Investment	Adjusted Net	Purposes
Description	Books	Income	Income	(Cash Basis Only)
1 ROBERT L WEINER CPA	10,000	2,000		8,000

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

	11,497	2,299	0	9,198
				Disbursements
	Revenue and			for Charitable
	Expenses per	Net Investment	Adjusted Net	Purposes
Description	Books	Income	Income	(Cash Basis Only)
1 KESTRA	11,497	2,299		9,198

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

		12,692	2,538	0	10,154
		Revenue			Disbursements
Ì		and Expenses	Net Investment	Adjusted	for Charitable
ì	Description	per Books	Income	Net Income	Purposes
1	Real estate tax not included in line 20	0			
2	Tax on investment income	0			
3	Income tax	1,572	314		1,258
4	Payroll taxes	11,120	2,224		8,896

Part I, Line 23 (990-PF) - Other Expenses

	121	24	C	97
	Revenue and			Disbursements
	Expenses	Net Investment	Adjusted Net	for Charitable
Description	per Books	Income	Income	Purposes
1 MISCELLANEOUS EXPENSE	121	24		97

		949,316	1,346,836	1,166,058	1,698,083
	Num Shares/	Book Value	Book Value	FMV	FMV
Description	Face Value	Beg of Year	End of Year	Beg of Year	End of Year
NFP SECURITIES		949,316	1,346,836	1,166,058	1,698,083

Part II, Line 13 (990-PF) - Investments - Other

			61 / 60 / 1	(408,718	080,801,1
1		Basis of	Book Value	Book Value	FMV
	Asset Description	Valuation	Beg of Year	End of Year	End of Year
-	MUTUAL FUNDS	AT COST	0		
7	ANNUITIES	AT COST	1,759,719	1,459,719	1,189,098

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