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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2017

Open to Public Inspection

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

Name of foundation
THE STANLEY AND ROBERTA BOGEN CHARITABLE FOUNDATION

Number and street (or P.O. box number if mail is not delivered to street address)
956 FIFTH AVENUE NO 7A

City or town, state or province, country, and ZIP or foreign postal code
NEW YORK, NY 10105

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☒ Address change

☐ Name change

H Check type of organization

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

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

\$ 3,823,031

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify)

(Part I, column (d) must be on cash basis)

A Employer identification number

94-3457573

B Telephone number (see instructions)

(212) 756-4482

C If exemption application is pending, check here

D 1. Foreign organizations, check here

2 Foreign organizations meeting the 85% test, check here and attach computation

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

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

Part I Analysis of Revenue and Expenses (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)	557,967		
	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	79,888	79,888	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	94,256		
	b Gross sales price for all assets on line 6a	579,896		
	7 Capital gain net income (from Part IV, line 2)		94,256	
	8 Net short-term capital gain			
	9 Income modifications			
	10a Gross sales less returns and allowances			
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	359	359		
12 Total. Add lines 1 through 11	732,470	174,503		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0	0
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits			
	16a Legal fees (attach schedule)			
	b Accounting fees (attach schedule)	2,760	1,840	920
	c Other professional fees (attach schedule)			
	17 Interest			
	18 Taxes (attach schedule) (see instructions)			
	19 Depreciation (attach schedule) and depletion			
	20 Occupancy			
	21 Travel, conferences, and meetings			
	22 Printing and publications			
	23 Other expenses (attach schedule)			
	24 Total operating and administrative expenses. Add lines 13 through 23	2,760	1,840	920
	25 Contributions, gifts, grants paid	636,140		636,140
26 Total expenses and disbursements. Add lines 24 and 25	638,900	1,840	637,060	
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	93,570		
	b Net investment income (if negative, enter -0-)		172,663	
c Adjusted net income(if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2017)

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	209,100	103,414	103,414
	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)	2,576,860	2,871,338	3,719,617
	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)	2,785,960	2,974,752	3,823,031	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	2,785,960	2,974,752	
	30	Total net assets or fund balances (see instructions)	2,785,960	2,974,752	
31	Total liabilities and net assets/fund balances (see instructions) .	2,785,960	2,974,752		

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	2,785,960
2	Enter amount from Part I, line 27a	2	93,570
3	Other increases not included in line 2 (itemize) ▶ _____	3	95,222
4	Add lines 1, 2, and 3	4	2,974,752
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	2,974,752

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	94,256
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	737,628	642,842	1 147448
2015	634,160	2,561,457	0 247578
2014	711,350	2,110,727	0 337017
2013	563,254	1,711,456	0 329108
2012	548,570	996,870	0 550292
2 Total of line 1, column (d)			2 2 611443
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 522289
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 643,996
5 Multiply line 4 by line 3			5 336,352
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,727
7 Add lines 5 and 6			7 338,079
8 Enter qualifying distributions from Part XII, line 4			8 637,060

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	1,727
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	1,727
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,727
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	0
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	0
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	54
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	1,781
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ☐ Refunded ☐	11	

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)? <i>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</i>	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? <i>If "Yes," attach a detailed description of the activities</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T</i>	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	No
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ NY		
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? <i>If "No," attach explanation</i> .	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)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> 	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 ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>TAXPAYER</u> Telephone no ▶ <u>(914) 949-2990</u>			

Located at ▶ C/O CITRIN COOPERMAN 709 WESTCHESTE AVENUE WHITE PLAINS NY ZIP+4 ▶ 10604

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ ☐	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?	16	Yes No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ▶			

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

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

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)? ☐	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?	☐ Yes ☐ No			
	<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>				
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	No	
	<i>If "Yes" to 6b, file Form 8870</i>				
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
STANLEY BOGEN 956 FIFTH AVENUE NEW YORK, NY 10075	TRUSTEE AS NEEDED 0 00	0	0	0
ROBERTA BOGEN 956 FIFTH AVENUE NEW YORK, NY 10075	TRUSTEE AS NEEDED 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	(d) Contributions to employee benefit plans and deferred compensation	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	

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	500,000
b	Average of monthly cash balances.	1b	153,803
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	653,803
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	653,803
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	9,807
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	643,996
6	Minimum investment return. Enter 5% of line 5.	6	32,200

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	32,200
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	1,727
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,727
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	30,473
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	30,473
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	30,473

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	637,060
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	637,060
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	1,727
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	635,333

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				30,473
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.	500,230			
b From 2013.	480,371			
c From 2014.	607,125			
d From 2015.	507,505			
e From 2016.	710,256			
f Total of lines 3a through e.	2,805,487			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 637,060				
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.				30,473
e Remaining amount distributed out of corpus	606,587			
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	3,412,074			
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).	500,230			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	2,911,844			
10 Analysis of line 9				
a Excess from 2013.	480,371			
b Excess from 2014.	607,125			
c Excess from 2015.	507,505			
d Excess from 2016.	710,256			
e Excess from 2017.	606,587			

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

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.)

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

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.

- 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	636,140
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2017)

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

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

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

b If "Yes," complete the following schedule

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.	***** 2018-10-26 *****	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	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	DAVID SUNSHINE				P00367413
	Firm's name ▶ CITRIN COOPERMAN & COMPANY LLP				Firm's EIN ▶ 22-2428965
	Firm's address ▶ 709 WESTCHESTER AVENUE WHITE PLAINS, NY 10604				Phone no. (914) 949-2990

Form 990PF Part 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)
1000 SHARES S&P RETAIL ETF (SPDR SER TR)	P	2015-02-12	2017-01-11
400 SHARES 3M COMPANY	D	2008-01-14	2017-06-21
1500 SHARES THE TRAVELERS COMPANIES INC	D	2009-07-07	2017-07-24
2400 SHARES WELLS FARGO & CO	P	2012-07-02	2017-08-11
2000 SHARES GENERAL ELECTRIC CO	P	2017-01-13	2017-11-22
500 SHARES THE TRAVELERS COMPANIES INC	D	2001-03-09	2017-11-22
269 SHARES THE TRAVELERS COMPANIES INC	D	2001-03-09	2017-12-19

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)
44,019		48,321	-4,302
85,180		56,187	28,993
188,931		169,570	19,361
124,400		85,085	39,315
35,759		39,545	-3,786
65,132		56,523	8,609
36,475		30,409	6,066

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			(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	
			-4,302
			28,993
			19,361
			39,315
			-3,786
			8,609
			6,066

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>				
ALBERT EINSTEIN COLLEGE OF MEDICINE 1300 MORRIS PARK BRONX, NY 10461	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,000
ALZHEIMERS DRUG DISCOVERY FOUNDATION 57 WEST 57TH STREET SUITE 904 NEW YORK, NY 10019	NONE	PUBLIC CHARITY	GENERAL SUPPORT	710
AMERICAN BALLET THEATRE 890 BROADWAY NEW YORK, NY 10003	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500
Total ▶ 3a				636,140

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>				
AMERICAN FRIENDS OF HEBREW UNIVERSITY BATTERY PLACE NEW YORK, NY 10004	NONE	PUBLIC CHARITY	GENERAL SUPPORT	235,690
AMERICAN FRIENDS OF THE HEBREW UNIVERSITY ONE BATTERY PARK PLAZA NEW YORK, NY 10004	NONE	PUBLIC CHARITY	GENERAL SUPPORT	95,631
AMERICAN FRIENDS OF THE ISRAEL MUSEUM 500 FIFTH AVE NEW YORK, NY 10110	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000
Total ▶ 3a				636,140

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>				
AMERICAN FRIENDS OF THE ISRAEL PHILHARMONIC 122 EAST 42ND STREET SUITE 4507 NEW YORK, NY 10168	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000
AMERICAN ISRAEL CULTURAL FOUNDATION 1140 BROADWAY NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL SUPPORT	3,000
ANDREW GOLKIN MEMORIAL SCHOLARSHIP FUND 55 EXCHANGE PLACE SUITE 601 NEW YORK, NY 10005	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500
Total ▶ 3a				636,140

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>				
BIRTHRIGHT ISRAEL FOUNDATION PO BOX 5892 HICKSVILLE, NY 11802	NONE	PUBLIC CHARITY	GENERAL SUPPORT	6,000
BREAST CANCER RESEARCH FOUNDATION 60 E 56TH ST NEW YORK, NY 10022	NONE	PUBLIC CHARITY	GENERAL SUPPORT	11,000
CEI-PEA 28 WEST 44TH STREET SUITE 300 NEW YORK, NY 10036	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
Total ► 3a				636,140

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				
CENTRAL PARK CONSERVANCY 14 E 60TH ST NEW YORK, NY 10022	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
CHILDREN'S HEALTH FUND 215 WEST 125TH STREET 3RD FL NEW YORK, NY 10027	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
CITY OF HOPE 1500 EAST DUARTE ROAD DUARTE DUARTE, CA 91010	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
Total ▶ 3a				636,140

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				
CJE PJ LIBRARY 67 HUNT STREET SUITE 100 AGAWAM, MA 01001	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
CONGREGATION B'NAI ISRAEL 2710 PARK AVENUE BRIDGEPORT, CT 06604	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,200
CONGREGATION RODEPH SHOLOM 2385 PARK AVENUE BRIDGEPORT, CT 06604	NONE	PUBLIC CHARITY	GENERAL SUPPORT	6,780
Total ▶ 3a				636,140

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>				
DANA-FARBER CANCER INSTITUTE 450 BROOKLINE AVE BOSTON, MA 02215	NONE	PUBLIC CHARITY	GENERAL SUPPORT	860
DIDI HIRSCH MENTAL HEALTH 4760 S SEPULVEDA BLVD CULVER CITY, CA 90230	NONE	PUBLIC CHARITY	GENERAL SUPPORT	4,000
FOOD FOR NEEDY6401 LYONS RD COCONUT CREEK, FL 33073	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000
Total 				636,140
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>				
FRIENDS OF ALYN HOSPITAL 122 E 42ND ST 1519 NEW YORK, NY 10168	NONE	PUBLIC CHARITY	GENERAL SUPPORT	360
HEARING THE OVARIAN CANCER WHISPER (HOW) 1016 NORTH DIXIE HIGHWAY WEST PALM BEACH, FL 33401	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,500
HEARTBEET LIFESHARING 218 TOWN FARM RD HARDWICK, VT 05843	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
Total ► 3a				636,140

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>				
HERBREW FREE LOAN SOCIETY 675 THIRD AVENUE SUITE 1905 NEW YORK, NY 10017	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,250
HINENI132 W END AVE NEW YORK, NY 10023	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,200
ISRAEL POLICY FUND6 E 39TH ST NEW YORK, NY 10016	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000
Total ▶ 3a				636,140

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>				
ISRAEL TENNIS CENTERS FOUNDATION 57 WEST 38TH STREET SUITE 605 NEW YORK, NY 10018	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,800
JEWISH FEDERATION OF PALM BEACH COUNTY 4601 COMMUNITY DRIVE WEST PALM BEACH, FL 33417	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000
JEWISH HOME FOUNDATION OF NORTH JERSEY INC 50 EISENHOWER DRIVE PARAMUS, NJ 07652	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000
Total ▶ 3a				636,140

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>				
JEWISH REVIEW OF BOOKPO BOX 3000 DENVER, NJ 07834	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,000
JULLIARD SCHOOL 60 LINCON CENTER PLZ NEW YORK, NY 10023	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,500
KENYA EDUCATION FUN 360 E 72ND ST C3405 NEW YORK, NY 10021	NONE	PUBLIC CHARITY	GENERAL SUPPORT	900
Total ▶ 3a				636,140

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>				
LUPUS FOUNDATION OF AMERICA 2121 K STREET NW SUITE 200 WASHINGTON, DC 200371830	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
MACCABI USA1511 WALNUT ST 401 PHILADELPHIA, PA 19103	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,800
MIAMI CANCER INSTITUTE MEMO PONTON ONCOLOGY FUND 8900 N KENDALL DR MIAMI, FL 33176	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
Total ▶ 3a				636,140

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>				
MOUNT SINAI HEALTH SYSTEM PETER KRUEGER CENTER FOR 25-10 30TH AVENUE ASTORIA NEW YORK, NY 11102	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
NEW ISRAEL FOUNDATION330 7TH AVE NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,800
NEW YORK HISTORICAL SOCIETY 170 CENTRAL PARK WEST NEW YORK, NY 10024	NONE	PUBLIC CHARITY	GENERAL SUPPORT	6,000
Total ▶ 3a				636,140

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>				
NEW YORK-PRESBYTERIAN FUND INC 525 EAST 68TH STREET BOX 123 NEW YORK, NY 10065	NONE	PUBLIC CHARITY	GENERAL SUPPORT	25,000
NORTON MUSEUM OF ART 1451 S OLIVE AVE WEST PALM BEACH, FL 33401	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000
PALM BEACH COUNTRY CLUB FOUNDATION 760 N OCEAN BLVD PALM BEACH, FL 33480	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
Total ► 3a				636,140

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>				
PALM BEACH OPERACHIK 415S OLIVE AVE WEST PALM BEACH, FL 33401	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000
PALM BEACH SYNAGOGUE 120 NORTH COUNTRY RD PALM BEACH, FL 33480	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,000
PLANNED PARENTHOOD434 W 33RD ST NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000
Total ▶ 3a				636,140

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>				
PREP FOR PREP328 W71ST ST NEW YORK, NY 10023	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000
SALK INSTITUTEPO BOX 85800 SAN DIEGO, CA 92186	NONE	PUBLIC CHARITY	GENERAL SUPPORT	7,500
SAMARITAN'S PURSE MEMO US DISASTER RELIEF 013622 POBOX 300 BOONE, NC 28607	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000
Total ▶ 3a				636,140

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>				
SAVE THE CHILDREN 501 KINGS HWY E - SUITE 400 FAIRFIELD, CT 06825	NONE	PUBLIC CHARITY	GENERAL SUPPORT	250
SCS FOUNDATION1517 49TH ST BROOKLYN, NY 11219	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
SID JACOBSON JEWISH COMMUNITY CENTER 300 FOREST DR GREENVALE, NY 11548	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
Total ▶ 3a				636,140

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				
SINAI SCHOOLS1485 TEANECK ROAD TEANECK, NJ 07666	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500
ST ANDREW'S SCHOOL 350 NOXONTOWN ROAD TOWNSEND, DE 19734	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000
SUSAN G KOMEN 5005 LBJ FREEWAY SUITE 250 DALLAS, TX 75244	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000
Total ▶ 3a				636,140

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 ISRAEL OF THE CITY OF NEW YORK 112 EAST 75TH ST NEW YORK, NY 10021	NONE	PUBLIC CHARITY	GENERAL SUPPORT	8,435
THE ALLIANCE FOR EATING DISORDERS AWARENESS 1649 FORUM PLACE SUITE 2 WEST PALM BEACH, FL 33401	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000
THE FRICK COLLECTION1 E70TH ST NEW YORK, NY 10021	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,200
Total ► 3a				636,140

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 KRAVIS CENTER FOR THE PERFORMING ARTS 701 OKEECHOBEE BLVD WEST PALM BEACH, FL 33401	NONE	PUBLIC CHARITY	GENERAL SUPPORT	13,872
THE METROPOLITAN MUSUEUM ART 6 EAST 82ND STREETMANHATTAN NEW YORK, NY 10028	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,500
THE METROPOLITAN OPERA 70 LINCOLN CTR NEW YORK, NY 10023	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000
Total ► 3a				636,140

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				
THE MICHAEL BOLTON CHARITIES 116 MONTOWESE ST BRANFORD, CT 06405	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,500
THE NEW YORK PHILHARMONIC 10 LINCOLN CENTER PLAZA NEW YORK, NY 10023	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,200
THE PERLMAN MUSIC PROGRAM 19 WEST 69TH STREET NEW YORK, NY 10023	NONE	PUBLIC CHARITY	GENERAL SUPPORT	3,702
Total ▶ 3a				636,140

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 PUBLIC THEATER425 LAFAYETTE ST NEW YORK, NY 10003	NONE	PUBLIC CHARITY	GENERAL SUPPORT	15,000
THE WASHINGTON INSTITUTE FOR NEAR EAST POLICY 1828 L ST NW 1050 WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	GENERAL SUPPORT	20,000
THIRTEEN825 EIGHTH AVENUE NEW YORK, NY 10019	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500
Total ▶ 3a				636,140

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>				
UJA FEDERATION OF NEW YORK 130 E 59TH ST NEW YORK, NY 10022	NONE	PUBLIC CHARITY	GENERAL SUPPORT	25,000
WHITNEY MUSEUM OF AMERICAN ART 945 MADISON AVE MANHATTAN, NY 10021	NONE	PUBLIC CHARITY	GENERAL SUPPORT	250
WIKIMEDIA MONTGOMERY STREET SUITE 1600 SAN FRANCISCO, CA 94104	NONE	PUBLIC CHARITY	GENERAL SUPPORT	250
Total ▶ 3a				636,140

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>				
WILLIAM ISACOFF MD 200 UCLA MEDICAL PLZ STE 522 LOS ANGELES, CA 90095	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000
WORLD ORT INC 1745 BROADWAY 17TH FLOOR NEW YORK, NY 10019	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,500
Total ▶ 3a				636,140

TY 2017 Accounting Fees Schedule

Name: THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION

EIN: 94-3457573

Accounting Fees Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CITRIN COOPERMAN & CO LLP	2,760	1,840		920

TY 2017 Investments Corporate Stock Schedule

Name: THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION

EIN: 94-3457573

Name of Stock	End of Year Book Value	End of Year Fair Market Value
4000 GENERAL ELECTRIC.	102,164	69,800
3857 THE TRAVELERS COMPANIES INC6	443,570	523,163
10500 MORGAN STANLEY	447,648	550,935
1000 COSTCO WHOLESALE CORP	80,319	186,120
2000 3M COMPANY	280,935	470,740
3500 ABBOTT LAB	141,377	199,745
2000 ISHARES RUSSELL 2000 ETF	231,852	304,920
1000 ANTHEM INC	549,254	675,030
5000 ISHARES U S HOME CONSTRUCTION ETF	132,527	218,600
4000 PIMCO DYNAMIC CR INCOME FD COM SHS	81,256	89,760
2000 CONOCOPHILLIPS	80,429	109,780
2400 CITIGROUP INC	160,687	178,584
2000 DOWDUPONT INC	139,320	142,440

TY 2017 Other Income Schedule

Name: THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION

EIN: 94-3457573

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER MISC INCOME	359	359	359

TY 2017 Other Increases Schedule

Name: THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION

EIN: 94-3457573

Description	Amount
STOCK BASIS ADJUSTMENT	95,222

**TY 2017 Substantial Contributors
Schedule**

Name: THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION

EIN: 94-3457573

Name	Address
STANLEY ROBERTA BOGEN	1345 SIXTH AVE NEW YORK, NY 10105

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 THE STANLEY AND ROBERTA BOGEN CHARITABLE FOUNDATION	Employer identification number 94-3457573
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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 THE STANLEY AND ROBERTA BOGEN CHARITABLE FOUNDATION	Employer identification number 94-3457573
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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	STANLEY AND ROBERTA BOGEN	\$ 94,487	Person ☐
	956 FIFTH AVENUE		Payroll ☐
	NEW YORK, NY 10075		Noncash ☒
(Complete Part II for noncash contributions)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	STANLEY AND ROBERTA BOGEN	\$ 463,480	Person ☐
	956 FIFTH AVENUE		Payroll ☐
	NEW YORK, NY 10075		Noncash ☒
(Complete Part II for noncash contributions)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
.		\$	Person ☐
			Payroll ☐
			Noncash ☐
(Complete Part II for noncash contributions)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
.		\$	Person ☐
			Payroll ☐
			Noncash ☐
(Complete Part II for noncash contributions)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
.		\$	Person ☐
			Payroll ☐
			Noncash ☐
(Complete Part II for noncash contributions)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
.		\$	Person ☐
			Payroll ☐
			Noncash ☐
(Complete Part II for noncash contributions)			

Name of organization THE STANLEY AND ROBERTA BOGEN CHARITABLE FOUNDATION	Employer identification number 94-3457573
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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	769 SHS - THE TRAVELERS COMPANIES INC	\$ 94,487	2017-09-26
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
2	2000 SHS - ANTHEM INC	\$ 463,480	2017-12-01
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	

Name of organization THE STANLEY AND ROBERTA BOGEN CHARITABLE FOUNDATION	Employer identification number 94-3457573
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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
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee