

efile GRAPHIC print - DO NOT PROCESS			As Filed Data -			DLN: 93491194000128		
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 05-01-2017, and ending 04-30-2018								
Name of foundation THE ISRAEL ROSE HENRY & ROBERT WIENER CHARITABLE FOUNDATION				A Employer identification number 20-1125267				
Number and street (or P O box number if mail is not delivered to street address) 7401 SW 56TH COURT			Room/suite		B Telephone number (see instructions) (305) 662-6868			
City or town, state or province, country, and ZIP or foreign postal code MIAMI, FL 33143				C If exemption application is pending, check here				
G Check all that apply Initial return Final return Address change				D 1. Foreign organizations, check here 2 Foreign organizations meeting the 85% test, check here and attach computation				
H Check type of organization Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation				E If private foundation status was terminated under section 507(b)(1)(A), check here				
I Fair market value of all assets at end of year (from Part II, col (c), line 16)\$ 4,728,068		J Accounting method Cash Accrual Other (specify) (Part I, column (d) must be on cash basis)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here				
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))				(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)	
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)						
	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		91,735	78,295			
	5a	Gross rents						
	b	Net rental income or (loss)						
	6a	Net gain or (loss) from sale of assets not on line 10		57,788				
	b	Gross sales price for all assets on line 6a		718,787				
	7	Capital gain net income (from Part IV, line 2)			57,788			
	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)		55					
12	Total. Add lines 1 through 11		149,578	136,083				
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc		30,000	30,000			
	14	Other employee salaries and wages						
	15	Pension plans, employee benefits		2,295	2,295			
	16a	Legal fees (attach schedule)						
	b	Accounting fees (attach schedule)		3,465	3,465			
	c	Other professional fees (attach schedule)						
	17	Interest						
	18	Taxes (attach schedule) (see instructions)		61	61			
	19	Depreciation (attach schedule) and depletion		181				
	20	Occupancy						
	21	Travel, conferences, and meetings						
	22	Printing and publications						
	23	Other expenses (attach schedule)		55,547	55,547			
	24	Total operating and administrative expenses. Add lines 13 through 23		91,549	91,368		0	
	25	Contributions, gifts, grants paid		232,650			232,650	
26	Total expenses and disbursements. Add lines 24 and 25		324,199	91,368		232,650		
27	Subtract line 26 from line 12							
a	Excess of revenue over expenses and disbursements		-174,621					
b	Net investment income (if negative, enter -0-)			44,715				
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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
Assets	1	Cash—non-interest-bearing	36,664	50,950	50,950		
	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)					
	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)	4,440,936	4,250,935	4,675,918		
	14	Land, buildings, and equipment basis ▶ _____ 1,884 Less accumulated depreciation (attach schedule) ▶ _____ 1,613	452	271			
15	Other assets (describe ▶ _____)	1,000	1,200	1,200			
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	4,479,052	4,303,356	4,728,068			
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			
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					
	28	Paid-in or capital surplus, or land, bldg , and equipment fund					
	29	Retained earnings, accumulated income, endowment, or other funds	4,479,052	4,303,356			
	30	Total net assets or fund balances (see instructions)	4,479,052	4,303,356			
31	Total liabilities and net assets/fund balances (see instructions) .	4,479,052	4,303,356				

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	4,479,052
2	Enter amount from Part I, line 27a	2	-174,621
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	4,304,431
5	Decreases not included in line 2 (itemize) ▶ _____	5	1,075
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	4,303,356

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	57,788
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	-8,753

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	238,200	4,677,061	0 050929
2015	259,200	4,911,697	0 052772
2014	257,900	5,246,905	0 049153
2013	261,750	5,306,224	0 049329
2012	264,940	5,273,245	0 050242
2 Total of line 1, column (d)			2 0 252425
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 050485
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 4,688,078
5 Multiply line 4 by line 3			5 236,678
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 447
7 Add lines 5 and 6			7 237,125
8 Enter qualifying distributions from Part XII, line 4			8 232,650

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	894
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	
3	Add lines 1 and 2.	3	894
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	894
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	1,200
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	
7	Total credits and payments. Add lines 6a through 6d.	7	1,200
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	306
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ▶ 306 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 ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
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	Yes
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) ▶ _____		
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	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of JOAN ROZANSKY Telephone no (305) 662-6868			

Located at **7401 SW 56 COURT MIAMI FL** ZIP+4 **33143**

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year 15			
16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ▶	16	Yes	No

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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017? ☐	1c		
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)? ☐ Yes ☒ No Organizations relying on a current notice regarding disaster assistance check here. ☐ 	5b		
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? ☐ Yes ☒ No <i>If "Yes" to 6b, file Form 8870</i>	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No	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
JOAN ROZANSKY 7401 SW 56 COURT MIAMI, FL 33143	DPS 000 00	30,000	0	0
GLENN ROZANSKY 7401 SW 56 CT MIAMI, FL 33143	DT 000 00	0	0	0
LYNN WIENER 7401 SW 56 CT MIAMI, FL 33143	DV 000 00	0	0	0

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

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

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

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. ▶

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 N/A	
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	4,714,201
b	Average of monthly cash balances.	1b	43,807
c	Fair market value of all other assets (see instructions).	1c	1,462
d	Total (add lines 1a, b, and c).	1d	4,759,470
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	4,759,470
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	71,392
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	4,688,078
6	Minimum investment return. Enter 5% of line 5.	6	234,404

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	234,404
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	894
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	894
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	233,510
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	233,510
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	233,510

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	232,650
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., 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	232,650
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	232,650

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				233,510
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			232,452	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2017				
a From 2012.				
b From 2013.				
c From 2014.				
d From 2015.				
e From 2016.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 232,650				
a Applied to 2016, but not more than line 2a			232,452	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2017 distributable amount.				198
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
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.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				233,312
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).				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2013.				
b Excess from 2014.				
c Excess from 2015.				
d Excess from 2016.				
e Excess from 2017.				

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.)

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

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

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

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

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

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

- c** Any submission deadlines

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

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	232,650
b <i>Approved for future payment</i>				
Total			3b	

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.		
	*****	2018-07-10	*****
	Signature of officer or trustee	Date	Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	CAROL L SOKOLOW CPA		2018-07-10		P00125975
	Firm's name ▶ CAROL L SOKOLOW CPA PA				Firm's EIN ▶ 59-3542003
	Firm's address ▶ 9500 S DADELAND BLVD STE 700 MIAMI, FL 331562849				Phone no (305) 357-3700

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)
DIAMOND HILL LONG-SHORT	P	2009-12-04	2018-04-04
BERKSHIRE HATHAWAY	P	2011-08-10	2017-07-14
PARAMETRIC TAX-MANAGED EMERG MARKETS	P	2013-03-04	2018-04-04
HARBOR INTERNATIONAL	P	2013-02-20	2017-06-12
HARBOR INTERNATIONAL	P	2013-02-20	2018-04-04
SCHWAB FUNDAMENTAL US LG COMP	P	2015-02-10	2017-06-12
SCWAB FUNDAMENTAL US LG COMP	P	2015-02-10	2018-04-04
CHEVRON CORP NEW	P	2013-06-18	2017-05-19
NATIXIS VAUGHAN NELSON VALUE OPP	P	2014-11-06	2018-04-04
ARIZONA BOARD REGENTS	P	2012-05-24	2017-05-03

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)
30,000		18,758	11,242
26,643		25,010	1,633
50,000		45,783	4,217
30,000		28,216	1,784
35,000		33,360	1,640
20,000		19,164	836
25,000		22,721	2,279
25,471		25,079	392
20,000		19,824	176
25,729		25,012	717

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			11,242
			1,633
			4,217
			1,784
			1,640
			836
			2,279
			392
			176
			717

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)
JHANCOCK GLOBAL ABSOLUTE RETURN	P	2018-04-04	2018-04-04
UC REGENTS	P	2014-04-04	2017-05-03
VISA INC	P	2015-12-18	2018-02-22
ACCRETION ON BONDS	P	2015-04-30	2017-04-30
FT LAUDERDALE FLA SPL OBLIG	P	2012-09-20	2018-01-01
ISHARES S&P 500	P	2006-03-24	2017-12-04
COMCAST CORP NEW	P	2014-02-25	2017-11-15
WALMART STORES	P	2010-06-30	2017-10-24
WELLS FARGO	P	2016-07-06	2017-09-08
NEW YORK CITY TF	P	2016-04-12	2017-08-01

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)
110,000		118,753	-8,753
25,572		25,013	559
29,652		30,087	-435
		23,699	-23,699
25,000		25,000	
35,050		17,178	17,872
25,000		25,000	
26,266		25,001	1,265
30,000		30,000	
30,000		30,000	

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-8,753
			559
			-435
			-23,699
			17,872
			1,265

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)
CVS HEALTH CORP	P	2015-08-11	2017-07-25
BANK AMER CORP	P	2014-12-03	2017-07-24

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)
24,124		23,400	724
25,614		24,941	673

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	
			724
			673

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>				
ALPER JEWISH & CHILDREN FAMILY SER 5841 CORPORATE WAY WEST PALM BEACH, FL 33407	NONE	501(C)(3)	DONATION	50,000
ARSHT CENTER FOR THE PERFORMING ART 1300 BISCAYNE BLVD MIAMI, FL 33132	NONE	501(C)(3)	DONATION	20,000
BAPTIST HEALTH SOUTH FOUND 8900 N KENDALL DR MIAMI, FL 33176	NONE	501(C)(3)	DONATION	5,000
BEARTOOTH HOSPITAL AND HEALTH CENTE PO BOX 1290 RED LODGE, MT 59068	NONE	501(C)(3)	DONATION	1,000
CENTER FOR ADVANCEMENT OF JEWISH ED 4200 BISCAYNE BLVD MIAMI, FL 33137	NONE	501(C)(3)	DONATION	1,000
Total 3a				232,650

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>				
CONGREGATION BETH AARON PO BOX 187 BILLINGS, MT 59013	NONE	501(C)(3)	DONATION	1,000
CONGREGATION ETZ CHAIM 1881 NE 26TH ST WILTON MANORS, FL 33305	NONE	501(C)(3)	DONATION	3,600
GREATER MIAMI JEWISH FEDERATION 4200 BISCAYNE BLVD MIAMI, FL 33137	NONE	501 (C) (3)	DONATION	15,000
HEALTH INFORMATION PROJECT 4601 PONCE DE LEON BLVD CORAL GABLES, FL 33146	NONE	501(C)(3)	DONATION	2,500
HILLEL INTERNATIONAL800 EIGHTH ST NW WASHINGTON, DC 20001	NONE	501(C)(3)	DONATION	5,400
Total ► 3a				232,650

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>				
HILLEL OF BROWARD AND PALM BCH 777 GLADES RD BOCA RATON, FL 33431	NONE	501(C)(3)	DONATION	26,300
JEWISH COMMUNITY SERVICES 735 NE 125 STREET BORTH MIAMI, FL 33161	NONE	501(C)(3)	DONATION	3,600
JEWISH FEDERATION OF PALM BCH COUNT 4601 COMMUNITY DR WEST PALM BEACH, FL 33417	NONE	501(C)(3)	DONATION	40,000
JEWISH NATIONAL FUND 902 CLINT MOORE RD 128 BOCA RATON, FL 33487	NONE	501(C) (3)	DONATION	1,600
MIAMI CITY BALLET2200 LIBERTY AVE MIAMI BEACH, FL 33139	NONE	501(C)(3)	DONATION	1,000
Total ▶ 3a				232,650

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>				
MONTANA SHAKESPEARE IN THE PARKS PO BOX 174120 BOZEMAN, MT 59717	NONE	501(C)(3)	DONATION	1,000
NEW WORLD SYMPHONY500 17TH ST MIAMI BEACH, FL 33139	NONE	501(C)(3)	DONATION	1,000
PAMM ATTN LEANN STANDISH 1103 BISCAYNE BLVD MIAMI, FL 33132	NONE	501(C)(3)	DONATION	4,600
PATRICIA & PHILLIP FROST ART MUSEU 10975 SW 17TH STREET MIAMI, FL 33199	NONE	501(C)(3)	DONATION	1,000
TEMPLE BETH AM 5950 NORTH KENDALL DRIVE PINECREST, FL 33156	NONE	501(C)(3)	DONATION	1,350
Total ▶ 3a				232,650

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 JUDEA5500 GRANADA BLVD CORAL GABLES, FL 33146	NONE	501(C)(3)	DONATION	10,000
UNIV OF MIAMI FROST SCL OF MUSIC 1314 MILLER DRIVE CORAL GABLES, FL 33146	NONE	501(C)(3)	DONATION	6,000
UNIV OF MIAMI MILLER SCL OF MED PO BOX 016960 R-100 MIAMI, FL 33101	NONE	501(C)(3)	DONATION	5,000
UNIVERSITY OF MIAMI HILLEL 1100 STANFORD DRIVE CORAL GABLES, FL 33146	NONE	501 (C)(3)	DONATION	5,400
CONGREGATION DOR CHADASH 9400 SW 87TH AVE MIAMI, FL 33176	NONE	501(C)(3)	DONATION	1,000
Total ▶ 3a				232,650

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>				
DAVE & MARY ALPER JCC 11155 SW 112 AVE MIAMI, FL 33176	NONE	501(C)(3)	DONATION	2,000
AMERICAN JEWISH COMMITTEE 165 EAST 56 STREET NEW YORK, NY 10022	NONE	501(C)(3)	DONATION	1,800
SOUTH FLORIDA PBSPO BOX 610002 MIAMI, FL 33261	NONE	501(C)(3)	DONATION	1,000
REPAIR THE WORLD1460 BROADWAY NEW YORK, NY 10036	NONE	501(C)(3)	DONATION	1,800
GREATER WASHINGTON JEWISH FEDERATIO 6101 EXECUTIVE BLVD STE 100 NORTH BETHESDA, MD 20852	NONE	501(C)(3)	DONATION	1,800
Total ► 3a				232,650

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>				
ZOOLOGICAL SOCIETY OF FLORIDA 12400 SW 152 ST MIAMI, FL 33177	NONE	501(C)(3)	DONATION	1,800
KEY BISCAYNE COMMUNITY FOUNDATION 88 W MCINTYRE ST STE 200 KEY BISCAYNE, FL 33149	NONE	501(C)(3)	DONATION	1,000
ROCK N RUN HOLUB FAMILY FOUND 5780 SW 119 STREET MIAMI, FL 33157	NONE	501(C)(3)	DONATION	1,000
MENDING KIDS1101 N PACIFIC AVE STE 200 GLENDALE, CA 91202	NONE	501(C)(3)	DONATION	1,800
CHILDRENS HEALTHCARE CHARITY C/O IMG 3300 PGA BLVD STE 800 PALM BEACH GARDENS, FL 33410	NONE	501(C)(3)	DONATION	3,500
Total 3a				232,650

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				
JEWISH MUSEUM OF FLORIDA 301 WASHINGTON AVE MIAMI BEACH, FL 33139	NONE	501(C)(3)	NONE	1,800
Total 				232,650
3a				

TY 2017 Accounting Fees Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Accounting Fees Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	3,465	3,465		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2017 Depreciation Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
COMPUTER	2015-09-15	1,884	1,432	200DB	5 0000	181			

TY 2017 Investments - Other Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
SCHWAB 2065-7255	AT COST	3,030,302	3,487,025
SCHWAB 5125-4646	AT COST	1,220,633	1,188,893

TY 2017 Land, Etc. Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTER	1,884	1,613	271	

TY 2017 Other Assets Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ESTIMATED TAXES	1,000	1,200	1,200

TY 2017 Other Decreases Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Description	Amount
INCOME TAXES	1,075

TY 2017 Other Expenses Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
INSURANCE	1,163	1,163		
INVESTMENT ADVISORY FEES	53,856	53,856		
BANK CHARGES	28	28		
OFFICE SUPPLIES	500	500		

TY 2017 Other Income Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS	55		

TY 2017 Taxes Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ANNUAL FILING FEE	61	61		