

Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

2017

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

- ▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

For calendar year 2017 or tax year beginning 7/1/2017, and ending 6/30/2018

Name of foundation
WEINSHEL GOLDFARB FOUNDATION, INC

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
c/o L. WOLLIN 124 PROSPECT ST

City or town, state or province country, and ZIP or foreign postal code
RIDGEWOOD NJ 07450

Foreign country name Foreign province/state/country Foreign postal code

A Employer identification number
22-3553567

B Telephone number (see instructions)
212-785-2610

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 ☐

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) ▶ \$ 3,016,137

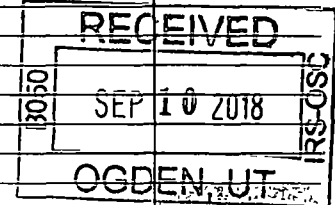
J Accounting method ☒ Cash ☐ Accrual
Other (specify) _____ (Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	31,000			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	54,242	54,242		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	130,790			
	b Gross sales price for all assets on line 6a 299,084				
	7 Capital gain net income (from Part IV, line 2)		130,790		
	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)					
12 Total. Add lines 1 through 11	216,032	185,032	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,890			
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	468			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	53,858			
	22 Printing and publications				
	23 Other expenses (attach schedule)	2,953	1,200		
	24 Total operating and administrative expenses. Add lines 13 through 23	60,169	1,200	0	0
25 Contributions, gifts, grants paid	166,399			166,399	
26 Total expenses and disbursements. Add lines 24 and 25	226,568	1,200	0	166,399	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-10,536				
b Net investment income (if negative, enter -0-)		183,832			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2017)

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624

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				
	2	Savings and temporary cash investments		15,774	4,506	4,506
	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)		1,102,877	1,108,609	3,011,631
	c	Investments—corporate bonds (attach schedule)				
Liabilities	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)		1,118,651	1,113,115	3,016,137
	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons			5,000	
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		0	5,000	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. ▶ <input type="checkbox"/>				
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>				
	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		1,118,651	1,108,115	
	30	Total net assets or fund balances (see instructions)		1,118,651	1,108,115	
	31	Total liabilities and net assets/fund balances (see instructions)		1,118,651	1,113,115	

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	1,118,651
2	Enter amount from Part I, line 27a	2	-10,536
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,108,115
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,108,115

Part IV Capital Gains and Losses for Tax on Investment Income

a) List and describe the kind(s) of property sold (for example, real estate 2-story brick warehouse, or common stock 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo day yr)	(d) Date sold (mo day, yr)
1a SCHED ATTACHED-LT GAIN		P	3/20/2014	6/30/2018
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 299,084		168,294	130,790	
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j) if any		
a			130,790	
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	130,790
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	{ If gain, also enter in Part I, line 8, column (c) See instructions If (loss), enter -0- in		3	0

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2016	95,163	2,349,356	0.040506
2015	108,792	2,065,198	0.052679
2014	113,666	2,047,867	0.055505
2013	73,705	1,569,656	0.046956
2012	75,366	1,370,574	0.054989
2 Total of line 1, column (d)			2 0.250635
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years			3 0.050127
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 2,789,312
5 Multiply line 4 by line 3			5 139,820
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,838
7 Add lines 5 and 6			7 141,658
8 Enter qualifying distributions from Part XII, line 4 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			8 166,399

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	1,838
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	1,838
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	1,838
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	
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	0
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> 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	1,838
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	0
11	Enter the amount of line 10 to be Credited to 2018 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. DE		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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.	Yes	No
11			X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.		X
12			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address: N/A	X	
13		X	
14	The books are in care of: LONNIE E WOLLIN PC Telephone no: 201-816-8404 Located at: 124 PROSPECT ST, RIDGEWOOD, NJ ZIP+4: 07450		
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 the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country.	Yes	No
16			X

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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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.		X
1b			X
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?		X
1c			X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? If "Yes," list the years: 20____, 20____, 20____, 20____	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)		N/A
2b			N/A
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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.)		N/A
3b			N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
4a			X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?		X
4b			X

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

<p>5a During the year, did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes?</p> <p>(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?</p> <p>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</p> <p>Organizations relying on a current notice regarding disaster assistance, check here ▶ <input type="checkbox"/></p> <p>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?</p> <p>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?</p> <p>If "Yes" to 6b, file Form 8870</p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?</p> <p>b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>5b</p> <p>N/A</p> <p>6b</p> <p>X</p> <p>7b</p> <p>N/A</p>
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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ELIZABETH WEINSHEL 2621 PALISADES AVE APT 5B RIVERDALE, NY 10463	PRES P/T 1 00	0		
JOEL GOLDFARB 2621 PALISADES AVE APT 5B RIVERDALE, NY 10463	VP P/T 1 00	0		
LONNIE WOLLIN 124 PROSPECT ST RIDGEWOOD, NJ 07450	SECY/TRES P/T 50	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	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000 ▶ 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	2,762,022
b	Average of monthly cash balances	1b	69,767
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	2,831,789
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	2,831,789
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see instructions)	4	42,477
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,789,312
6	Minimum investment return. Enter 5% of line 5	6	139,466

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	139,466
2a	Tax on investment income for 2017 from Part VI, line 5	2a	1,838
b	Income tax for 2017 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,838
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	137,628
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	137,628
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	137,628

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	166,399
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	166,399
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	1,838
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	164,561

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				137,628
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			743	
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	0			
4 Qualifying distributions for 2017 from Part XII, line 4 ► \$ 166,399				
a Applied to 2016, but not more than line 2a			743	
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				137,628
e Remaining amount distributed out of corpus	28,028			
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	28,028			
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				
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			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)				
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	28,028			
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	28,028			

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SCHEDULE ATTACHED	N/A	PC	EDUCATIONAL	166,399
Total			3a	166,399
b Approved for future payment				
Total			3b	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities					
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e)		0		0	0
13	Total. Add line 12, columns (b), (d), and (e)					

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

- Attach to Form 990, Form 990-EZ, or Form 990-PF.
► Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2017

Name of the organization

WEINSHEL GOLDFARB FOUNDATION, INC

Employer identification number

22-3553567

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 property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ► \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization WEINSHEL GOLDFARB FOUNDATION, INC	Employer identification number 22-3553567
---	--

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	JOEL GOLDFARB 2621 Palisade Avenue Apt 5B Riverdale NY 10463-6120 Foreign State or Province _____ Foreign Country _____	\$ 31,000	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	_____ _____ Foreign State or Province _____ Foreign Country _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	_____ _____ Foreign State or Province _____ Foreign Country _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	_____ _____ Foreign State or Province _____ Foreign Country _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	_____ _____ Foreign State or Province _____ Foreign Country _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	_____ _____ Foreign State or Province _____ Foreign Country _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	_____ _____ Foreign State or Province _____ Foreign Country _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Part I, Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

								Totals	Gross Sales	Cost or Other Basis, Expenses, Depreciation and Adjustments	Net Gain or Loss			
Long Term CG Distributions	Amount	0						Capital Gains/Losses	299,084	168,294	130,790			
Short Term CG Distributions		0						Other sales	0	0	0			
Description	CUSIP #	Check "X" to include in Part IV	Purchaser	Check "X" if Purchaser is a Business	Acquisition Method	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Valuation Method	Expense of Sale and Cost of Improvements	Depreciation	Adjustments	Net Gain or Loss
1 SCHED ATTACHED-LT GAIN		X	PUBLIC	X	P	3/20/2014	6/30/2018	299,084	168,294					130,790

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

		2,890	0	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	LONNIE E WOLLIN, PC	2,890			0

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

		468	0	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	Real estate tax not included in line 20	0			
2	Tax on investment income	443			
3	Income tax	0			
4	DELAWARE FRANCHISE TAX	25			

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

		2,953	1,200	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	DELAWARE REPRESENTATION FEE	350	0		
2	INVESTMENT RESEARCH	1,200	1,200		
3	COMPUTER EXPENSE	1,403	0		

Part II, Line 10b (990-PF) - Investments - Corporate Stock

		1,102,877	1,108,609	2,558,042	3,011,631	
	Description	Num Shares/ Face Value	Book Value Beg of Year	Book Value End of Year	FMV Beg of Year	FMV End of Year
1	SCHEDULE ATTACHED		1,102,877	1,108,609	2,558,042	3,011,631

SEC Positions			
PART II line 10b Column			(a)
Num	Name	Date Purchased	Book Value
500	ABBOTT LABS	02/11/2003	8,771
1000	ABBOTT LABS	01/19/2011	22,840
500	ABBVIE INC	02/06/2003	9,512
1000	ABBVIE INC	01/13/2011	24,769
100	ALPHABET CL A formerly GOOGLE INC CI C NON VTG	02/13/2014	59,136
100	ALPHABET CL C formerly GOOGLE INC CL A VTG	02/13/2014	58,786
200	AMAZON COM INC	02/14/2014	69,579
50	AMAZON COM INC	03/09/2014	15,943
100	AMAZON COM INC	04/14/2014	31,760
50	AMAZON COM INC	05/08/2014	14,509
700	APPLE INC	12/31/2012	46,009
1400	APPLE INC	07/10/2008	34,995
700	APPLE INC	10/09/2008	9,013
2100	APPLE INC	10/24/2008	27,076
100	APPLE INC	08/27/2015	9,526
50	APPLE INC	01/12/2016	4,944
250	APPLE INC	12/31/2015	26,759
50	APPLE INC	01/08/2016	4,935
200	APPLE INC	04/27/2016	19,209
200	APPLE INC	04/29/2016	18,760
50	APPLE INC	05/16/2016	4,631
50	APPLE INC	06/27/2016	4,644
200	CHEVRON CORP	02/27/2015	21,529
275	EXXON MOBIL CORP	02/27/2015	24,483
1000	FEDERAL RLTY INVT TR SBI	12/11/2007	84,562
700	GENERAL ELECTRIC	02/11/2003	15,983
200	GENERAL ELECTRIC	09/15/2011	3,009
100	GENERAL ELECTRIC	03/20/2014	2,541
500	GILEAD SCIENCES INC	03/08/2012	11,744
50	GOLDMAN SACHS GROUP	03/23/2011	7,899
50	GOLDMAN SACHS GROUP	09/14/2011	5,209
100	GOLDMAN SACHS GROUP	12/23/2011	8,979
1000	HALLIBURTON HOLDING CO	04/04/2012	32,819
1000	MFA FINANCIAL INC	12/23/2011	6,999
5000	MFA FINANCIAL INC	07/19/2005	34,973
1000	MFA FINANCIAL INC	03/19/2008	5,563
4000	OMEGA HEALTHCARE INV	01/15/2009	36,390
100	PFIZER INC	02/18/2000	3,318
3525	PFIZER INC	09/09/2005	94,891
1375	PFIZER INC	06/20/2000	33,646
150	POWERSHARES QQQ TRUST	11/09/2016	17,406
3943 22	SCHWAB S&P 500 INDEX FUND	11/24/2008	60,726
85 918	SCHWAB S&P 500 INDEX FUND	12/10/2008	1,323
57 937	SCHWAB S&P 500 INDEX FUND	12/10/2009	892
77 066	SCHWAB S&P 500 INDEX FUND	03/21/2011	1,187
850 425	SCHWAB S&P 500 INDEX FUND	03/21/2011	13,097
104 333	SCHWAB S&P 500 INDEX FUND	12/08/2011	1,607
114 614	SCHWAB S&P 500 INDEX FUND	12/31/2012	1,765
91 595	SCHWAB S&P 500 INDEX FUND	12/12/2013	1,411
100 069	SCHWAB S&P 500 INDEX FUND	12/16/2014	1,541
117 827	SCHWAB S&P 500 INDEX FUND	12/21/2015	1,815
56 443	SCHWAB S&P 500 INDEX FUND	12/21/2015	869
141 436	SCHWAB S&P 500 INDEX FUND	12/31/2016	4,916
400	WEYERHAEUSER CO - PLUM CREEK TIMBER	02/07/2003	5,383
150	WISDOMTREE TRUST	12/02/2013	4,002
300	WISDOMTREE TRUST	02/03/2014	7,636
600	WISDOMTREE TRUST	02/26/2015	16,657
			1,102,877

SEC Positions				
PART II line 10b Column			(b)	(c)
Num	Name	Date Purchased	Book Value	Fair Market Value
500	ABBOTT LABS	02/11/2003	8,771	30,495
1000	ABBOTT LABS	01/19/2011	22,840	60,990
500	ABBVIE INC	02/06/2003	9,512	46,325
1000	ABBVIE INC	01/13/2011	24,769	92,650
100	ALPHABET CL A formerly GOOGLE INC CI C NON VTG	02/13/2014	59,136	112,919
100	AMAZON COM INC	02/14/2014	34,789	169,980
50	AMAZON COM INC	03/09/2014	15,943	84,990
100	AMAZON COM INC	04/14/2014	31,760	169,980
50	AMAZON COM INC	05/08/2014	14,509	84,990
1350	APPLE INC	07/10/2008	33,745	249,899
700	APPLE INC	10/09/2008	9,013	129,577
2100	APPLE INC	10/24/2008	27,076	388,731
700	APPLE INC	12/31/2012	46,009	129,577
100	APPLE INC	08/27/2015	9,526	18,511
250	APPLE INC	12/31/2015	26,759	46,278
50	APPLE INC	01/08/2016	4,935	9,256
50	APPLE INC	01/12/2016	4,944	9,256
200	APPLE INC	04/27/2016	19,209	37,022
200	APPLE INC	04/29/2016	18,760	37,022
50	APPLE INC	05/16/2016	4,631	9,256
50	APPLE INC	06/27/2016	4,644	9,256
200	CHEVRON CORP	02/27/2015	21,529	25,286
100	CITIGROUP INC	04/16/2018	7,124	6,692
100	FACEBOOK INC	03/20/2018	16,505	19,432
50	FACEBOOK INC	04/03/2018	7,755	9,716
200	FEDEX CORP	01/02/2018	50,171	45,412
900	FEDERAL RLTY INVT TR SBI	12/11/2007	76,106	113,895
500	GILEAD SCIENCES INC	03/08/2012	11,744	35,420
100	GOLDMAN SACHS GROUP	12/23/2011	8,979	22,057
1000	HALLIBURTON HOLDING CO	04/04/2012	32,819	45,060
1000	MFA FINANCIAL INC	12/23/2011	6,999	7,580
5000	MFA FINANCIAL INC	07/19/2005	34,973	37,900
1000	MFA FINANCIAL INC	03/19/2008	5,563	7,580
4000	OMEGA HEALTHCARE INV	01/15/2009	32,661	124,000
3475	PFIZER INC	09/09/2005	93,667	126,073
1375	PFIZER INC	06/20/2000	33,646	49,885
150	INVESCO QQQ TRUST	11/09/2016	17,406	25,748
3943 22	SCHWAB S&P 500 INDEX FUND	11/24/2008	60,726	166,680
85 918	SCHWAB S&P 500 INDEX FUND	12/10/2008	1,323	3,632
57 937	SCHWAB S&P 500 INDEX FUND	12/10/2009	892	2,449
77 066	SCHWAB S&P 500 INDEX FUND	03/21/2011	1,187	3,258
850 425	SCHWAB S&P 500 INDEX FUND	03/21/2011	13,097	35,947
104 333	SCHWAB S&P 500 INDEX FUND	12/08/2011	1,607	4,410
114 614	SCHWAB S&P 500 INDEX FUND	12/31/2012	1,765	4,845
91 595	SCHWAB S&P 500 INDEX FUND	12/12/2013	1,411	3,872
100 069	SCHWAB S&P 500 INDEX FUND	12/16/2014	1,541	4,230
117 827	SCHWAB S&P 500 INDEX FUND	12/21/2015	1,815	4,981
99 627	SCHWAB S&P 500 INDEX FUND	12/18/2017	4,127	4,211
2 301	SCHWAB S&P 500 INDEX FUND	12/18/2017	95	97
56 443	SCHWAB S&P 500 INDEX FUND	12/21/2015	869	2,386
141 436	SCHWAB S&P 500 INDEX FUND	12/31/2016	4,916	5,978
300	WEYERHAEUSER CO - PLUM CREEK TIMBER	02/07/2003	4,037	10,938
550	VANGUARD FTSE EMERGING	11/21/2017	24,964	23,210
550	VANGUARD FTSE EMERGING	12/12/2017	24,205	23,210
900	VANGUARD FTSE EMERGING	01/05/2018	42,809	37,980
150	WISDOMTREE TRUST	12/02/2013	4,002	5,804
300	WISDOMTREE TRUST	02/03/2014	7,636	11,607
600	WISDOMTREE TRUST	02/26/2015	16,657	23,214
			1,108,609	3,011,631

Part II, Line 20 (990-PF) - Loans from Officers, Directors, Trustees, Other Disqualified Persons

		5,000		0		5,000												0	
Name of Lender		Title	Original Amount	Balance Due Beg. of Year	Balance Due End of Year	Security Provided	Date of Note	Maturity Date	Repayment Terms	Interest Rate	Purpose of Loan	Consideration Description	Fair Market Value of Consideration						
1	JOEL GOLDFARB	VP	5,000		5,000					ZERO	NO INTEREST	NONE	0						

06/30/2018

Weinshel Goldfarb Foundation

08/16/18

PART IV line 1 (a)						
	<u>Short Term</u>					
# Shares	<u>Security</u>	<u>Date Acquired</u>	<u>Trade Date</u>	<u>Gross Sales Price</u>	<u>Cost</u>	<u>Gain/ Loss</u>
	Short Term Gain or (Loss)			0	0	0
	<u>Long Term</u>					
-100	ALPHABET CL C GOOGLE INC CL A VTG		10/09/2017	98,492 77		
100	ALPHABET CL A - GOOGLE INC CI C NON VTG	02/13/2014			58,786 11	
-100	AMAZON COM INC		10/27/2017	107,992 56		
100	AMAZON COM INC	02/13/2014			34,789 48	
-50	APPLE INC		10/30/2017	8,244 86		
50	APPLE INC	07/10/2008			1,249 82	
-25	EXXON MOBIL CORP		07/18/2017	2,020 00		
-50	EXXON MOBIL CORP		07/25/2017	4,034 96		
-200	EXXON MOBIL CORP		12/29/2017	16,794 66		
25	EXXON MOBIL CORP	02/27/2015			2,225 75	
50	EXXON MOBIL CORP	07/25/2017			4,451 49	
200	EXXON MOBIL CORP	02/27/2015			17,805 96	
100	FEDERAL RLTY INVT TR SBI		09/27/2017	12,335 48		
100	FEDERAL RLTY INVT TR SBI	12/11/2007			8,456 22	
-1000	GENERAL ELECTRIC		01/03/2018	17,264 65		
700	GENERAL ELECTRIC	02/06/2003			15,983 06	
200	GENERAL ELECTRIC	09/12/2011			3,008 95	
100	GENERAL ELECTRIC	03/20/2014			2,540 95	
-100	GOLDMAN SACHS GROUP		09/27/2017	23,494 51		
50	GOLDMAN SACHS GROUP	03/18/2011			7,898 95	
50	GOLDMAN SACHS GROUP	09/09/2011			5,209 45	
-100	PFIZER INC		07/12/2017	3,336 47		
-50	PFIZER INC		08/03/2017	1,675 01		
100	PFIZER INC	02/18/2000			3,318 49	
50	PFIZER INC	06/20/2000			1,223 50	
-100	Weyerhaeuser Co		07/25/2017	3,397 97		
100	Weyerhaeuser Co	02/07/2003			1,345 81	
	Long Term Gain or (Loss)			299,084	168,294	130,790
	LONG AND SHORT TERM GAIN OR (LOSS)			299,084	168,294	130,790

