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EXTENDED TO APRIL 15, 2019

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.

▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017 or tax year beginning JUN 1, 2017 , and ending MAY 31, 2018

Name of foundation: RAYMOND ZIMMERMAN FAMILY FOUNDATION

A Employer identification number: 62-6166380

Number and street (or P O box number if mail is not delivered to street address): P.O. BOX 810939 | Room/suite

B Telephone number: 561-999-9815

City or town, state or province, country, and ZIP or foreign postal code: BOCA RATON, FL 33481

C If exemption application is pending, check here ▶ [ ]

G Check all that apply: [ ] Initial return [ ] Initial return of a former public charity [ ] Final return [ ] Amended return [ ] Address change [ ] Name change

D 1 Foreign organizations, check here ▶ [ ]

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

H Check type of organization: [X] 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) ▶$ 8,336,004.

J Accounting method: [X] 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 ▶ [ ]

04

6

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).)	(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			N/A	
2 Check ▶ [X] if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	141,500.	141,500.		STATEMENT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	153,319.			
b Gross sales price for all assets on line 6a 1,801,517.				
7 Capital gain net income (from Part IV, line 2)		153,319.		
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)				
11 Other income	12.	12.		STATEMENT 2
12 **Total** Add lines 1 through 11	294,831.	294,831.		
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc	0.	0.		0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees STMT 3	3,335.	1,667.		0.
b Accounting fees STMT 4	6,375.	3,188.		3,187.
c Other professional fees STMT 5	36,377.	36,377.		0.
17 Interest				
18 Taxes				
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings	47,942.	0.		0.
22 Printing and publications				
23 Other expenses STMT 6	777.	0.		0.
24 **Total operating and administrative expenses** Add lines 13 through 23	94,806.	41,232.		3,187.
25 Contributions, gifts, grants paid	475,678.			475,678.
26 **Total expenses and disbursements.** Add lines 24 and 25	570,484.	41,232.		478,865.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-275,653.			
b **Net investment income** (if negative, enter -0-)		253,599.		
c **Adjusted net income** (if negative, enter -0-)			N/A	

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10361025 756350 92041000 2017.04030 RAYMOND ZIMMERMAN FAMILY FO 92041001

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	29,522.	17,060.	17,060.
	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			
	7 Other notes and loans receivable ▶ 800.			
	Less: allowance for doubtful accounts ▶ 0.	6,300.	800.	800.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock STMT 9	3,668,437.	7,271,382.	8,315,928.
	c Investments - corporate bonds			
	11 Investments land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 10	0.	4,006.	2,216.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	3,704,259.	7,293,248.	8,336,004.
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			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here** ▶ ☐ **and complete lines 24 through 26, and lines 30 and 31**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [X] **and complete lines 27 through 31**			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	3,704,259.	7,293,248.	
	30 **Total net assets or fund balances**	3,704,259.	7,293,248.	
	31 **Total liabilities and net assets/fund balances**	3,704,259.	7,293,248.	

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	3,704,259.
2 Enter amount from Part I, line 27a	2	-275,653.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	3,864,642.
4 Add lines 1, 2, and 3	4	7,293,248.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	7,293,248.

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	PUBLICLY TRADED SECURITIES	P		
b	PUBLICLY TRADED SECURITIES	P		
c	CAPITAL GAINS DIVIDENDS			
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	596,343.		535,275.	61,068.
b	1,197,369.		1,112,923.	84,446.
c	7,805.			7,805.
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(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	(l) Gains (Col. (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				61,068.
b				84,446.
c				7,805.
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 — 153,319.

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). If (loss), enter -0- in Part I, line 8 — 3 — N/A

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	249,004.	3,959,616.	.062886
2015	71,930.	4,008,724.	.017943
2014	111,888.	4,011,856.	.027889
2013	147,279.	4,182,737.	.035211
2012	165,965.	3,922,388.	.042312

2	**Total** of line 1, column (d)	2	.186241
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	.037248
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	5,977,897.
5	Multiply line 4 by line 3	5	222,665.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,536.
7	Add lines 5 and 6	7	225,201.
8	Enter qualifying distributions from Part XII, line 4	8	478,865.

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

3

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 ▶ [X] and enter 1% of Part I, line 27b			1	2,536.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)			2	0.
3	Add lines 1 and 2			3	2,536.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)			4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	2,536.
6	Credits/Payments:				
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	3,328.		
b	Exempt foreign organizations - tax withheld at source	6b	0.		
c	Tax paid with application for extension of time to file (Form 8868)	6c	0.		
d	Backup withholding erroneously withheld	6d	0.		
7	Total credits and payments. Add lines 6a through 6d			7	3,328.
8	Enter any **penalty** for underpayment of estimated tax. Check here [ ] if Form 2220 is attached			8	0.
9	**Tax due** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	792.
11	Enter the amount of line 10 to be: **Credited to 2018 estimated tax** ▶ 792. **Refunded** ▶			11	0.

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
	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.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation ▶ $ 0. **(2)** On foundation managers ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T*	5		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?	6	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	7	X	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ TN, FL			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G*? If "No," attach explanation	8b	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	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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		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	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ RAYMOND ZIMMERMAN Telephone no ▶561-999-9815

Located at ▶P.O. BOX 810939, BOCA RATON, FL ZIP+4 ▶33481

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 N/A

			Yes	No
16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year, did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 N/A	1b		
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
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		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? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____			
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		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ____, ____, ____, ____			
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) N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	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?	4b		X

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

			Yes	No
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	N/A	5b		
Organizations relying on a current notice regarding disaster assistance, check here	▶ ☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No			
If "Yes," attach the statement required by Regulations section 53.4945-5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		X
If "Yes" to 6b, file Form 8870				
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?	N/A	7b		

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.

(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
RAYMOND ZIMMERMAN P.O. BOX 810939 BOCA RATON, FL 33481	TRUSTEE 5.00	0.	0.	0.
FRED E. ZIMMERMAN P.O. BOX 810939 BOCA RATON, FL 33481	TRUSTEE 1.00	0.	0.	0.
ROBIN RUBINOFF P.O. BOX 810939 BOCA RATON, FL 33481	TRUSTEE 1.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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. 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 N/A	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments**

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 ▶	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	6,029,392.
b	Average of monthly cash balances		1b	39,539.
c	Fair market value of all other assets		1c	
d	**Total** (add lines 1a, b, and c)		1d	6,068,931.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	6,068,931.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	91,034.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	5,977,897.
6	**Minimum investment return** Enter 5% of line 5		6	298,895.

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	298,895.
2a	Tax on investment income for 2017 from Part VI, line 5	2a 2,536.		
b	Income tax for 2017. (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	2,536.
3	Distributable amount before adjustments Subtract line 2c from line 1		3	296,359.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	296,359.
6	Deduction from distributable amount (see instructions)		6	0.
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1		7	296,359.

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	478,865.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8; and Part XIII, line 4	4	478,865.
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	5	2,536.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	476,329.

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				296,359.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			105,820.	
b Total for prior years: ____ , ____ , ____		0.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012					
b From 2013					
c From 2014					
d From 2015					
e From 2016 35,801.				
f **Total** of lines 3a through e	35,801.			
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ $ 478,865.				
a Applied to 2016, but not more than line 2a			105,820.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2017 distributable amount				296,359.
e Remaining amount distributed out of corpus	76,686.			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	112,487.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2018** Subtract lines 7 and 8 from line 6a	112,487.			
10 Analysis of line 9:				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015				
d Excess from 2016 35,801.				
e Excess from 2017 76,686.				

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Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year-see instructions.)

1 **Information Regarding Foundation Managers:**

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

RAYMOND ZIMMERMAN

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

NONE

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

Check here ▶ [X] 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 , 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 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*				
SEE ATTACHMENT	N/A	PUBLIC	GENERAL OPERATIONS	475,678.
Total			▶ **3a**	475,678.
b *Approved for future payment*				
NONE				
Total			▶ **3b**	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	141,500.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			14	12.	
8 Gain or (loss) from sales of assets other than inventory			18	153,319.	
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.		294,831.	0.

13 Total Add line 12, columns (b), (d), and (e) 13 294,831.

(See worksheet in line 13 instructions to verify calculations)

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

Line No ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash	1a(1)		X
(2) Other assets	1a(2)		X
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
(3) Rental of facilities, equipment, or other assets	1b(3)		X
(4) Reimbursement arrangements	1b(4)		X
(5) Loans or loan guarantees	1b(5)		X
(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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
		N/A	

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (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
N/A		

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

Signature of officer or trustee | Date 11/12/18 | Title TRUSTEE

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
SCOTT F BERGER, CPA	SCOTT F BERGER, C	10/25/18		P00082698

Firm's name ▶ KAUFMAN, ROSSIN & CO.,P.A. | Firm's EIN ▶ 59-1818353

Firm's address ▶ ONE TOWN CENTER ROAD, SUITE 400 BOCA RATON, FL 33486 | Phone no 561-394-5100

Raymond Zimmerman Family Foundation
Transaction Detail by Account
June 2017 through May 2018

RAYMOND ZIMMERMAN FAMILY FOUNDATION
FISCAL YEAR END MAY 31, 2018
Charitable Contributions - June 2017 through May 2018
PART XV, PAGE 11

Date	Name	Memo	Paid amount
06/07/2017	Leya Kaufman	Generosity Signature Event @ The Bash	500 00
06/07/2017	Zimmer Cancer Center	In Memory of Roberta G Zimmer	25 00
06/13/2017	AMEX 9007	Chabad Preschool	180 00
06/13/2017	AMEX 9007	JDC	100 00
06/13/2017	AMEX 9007	United Jewish Communities	2,500 00
06/13/2017	AMEX 9007	JDC, Network for Good	720 00
06/13/2017	Citi Card	Aegis Sciences Foundation	100 00
06/22/2017	Congregation Sherith Israel	Yahrzeit of Harry Zimmerman	25 00
06/23/2017	Pine Crest School	Planned Payment/Mr & Mrs David Rubinoff	1,000 00
06/23/2017	Pine Crest School	Planned Payment/Mr & Mrs David Rubinoff	1,000 00
06/23/2017	Torah Academy		1,800 00
06/26/2017	Hands in Outreach		250 00
07/05/2017	JDC	In Memory of Don Robinson	18 00
07/05/2017	JDC	In Memory of Barry Schloss	18 00
07/05/2017	The Observer		150 00
07/05/2017	Gilda's Club Nashville	In Memory of Joseph Zendlovitz	36 00
07/15/2017	Chase Sapphire	BB IU Foundation 800-558-8311	360 00
07/15/2017	Chase Sapphire	JDC	842 81
07/15/2017	The Temple Congregation Ohabai Shalom	In Memory of Irving Levy	18 00
07/22/2017	AMEX 9007	FF Castelly	36 00
07/22/2017	AMEX 9007	JDC	647 02
07/22/2017	AMEX 9007	Wendy's Cancer Treatment	18 00
07/22/2017	AMEX 9007	PPGF 402-935-7733	100 00
07/18/2017	JDC Ukraine		278 93
07/28/2017	JDC	In Memory of Marion Art	100 00
08/03/2017	The Temple Congregation Ohabai Shalom	Yarhitz fund	250 00
08/03/2017	The Observer		150 00
08/12/2017	Chase Sapphire	Society for Manitobans	77 39
08/12/2017	Chase Sapphire	B'nai Torah	6,463 00
08/12/2017	Chase Sapphire	B'nai B'rith	146 00
08/12/2017	Chase Sapphire	National MS Society	100 00
08/18/2017	Holocaust Museum		200 00
08/18/2017	Hearing Loss Association of America	In Memory of Anita Morse	18 00
08/23/2017	JDC		100,000 00
08/23/2017	Congregation Micah		970 00
08/23/2017	Congregation B'nai Israel		2,000 00
08/23/2017	Jewish Agency for Israel		4,000 00
08/23/2017	Akiva School		5,000 00
08/23/2017	Akiva School		1,000 00
08/23/2017	Jewish Federation of South Palm Beach	2017 Traditional Annual Campaign/Etta Zimmerman	20 000 00
08/23/2017	Jewish Federation of South Palm Beach	2017 Traditional Annual Campaign/Raymond Zimmerman	11,500 00
08/23/2017	United way of Metropolitan Nashville	Toqueville Society	10,000 00
08/26/2017	B'nai Torah Congregation	In Honor of the Aufruf and Marriage of Noah Steinhardt	18 00
09/23/2017	ORT	In Honor of Gertrude Jaffe s 100th Birthday	180 00
09/23/2017	The Temple Congregation Ohabai Shalom	In Support of Charles Knvcher's Recovery	18 00
09/23/2017	West End Synagogue	In Memory of Roz Shainberg	100 00
09/23/2017	SCORE South Florida	In Memory of Norman Levine	100 00
09/23/2017	Chase Sapphire	B'nai Israel	3,800 00
09/23/2017	JDC	In Memory of Elaine Winik	36 00
09/23/2017	National MS Society		180 00
09/23/2017	Ruth & Norman Rales		100 00
09/23/2017	Give 33 org		1,000 00
09/23/2017	Jewish Federation Nashville		1,000 00
09/27/2017	B'nai Torah Congregation	In Memory of Roslyn Kwal	18 00
09/27/2017	Jewish Family Services - Ruth Rales	In Memory of Martin Stein	100 00
09/28/2017	Minneapolis Jewish Federation	In Honor of Harold Roitenberg	1,000 00
09/28/2017	B'nai Torah Congregation	To Celebrate the Birth of Asher Gralnick	18 00

Raymond Zimmerman Family Foundation
Transaction Detail by Account
June 2017 through May 2018

Date	Name	Memo	Paid amount
09/28/2017	B'nai Torah Congregation	TLC - Humcane PR	1,000 00
10/01/2017	Abe's Garden	Zimmerman Five-Year Pledge - Year 4	2,000 00
10/11/2017	AMEX 9007	Sigma Delta Tau	54 45
10/11/2017	AMEX 9007	My Puerto Rican Friends	250 00
10/11/2017	B'nai Torah Congregation	In Memory of Dr Bruce E Katz	18 00
10/13/2017	Chase Sapphire	Hands on Tedekah	1,000 00
10/13/2017	Chase Sapphire	Teamworks LLC	100 00
10/13/2017	Chase Sapphire	Jewish Federation of Nashville	50 00
10/13/2017	Chase Sapphire	Food Pantry	90 52
10/13/2017	Chase Sapphire	Boca Regional Hospital	1,100 00
10/25/2017	University School of Nashville	2017 - Payment 2	5,000 00
10/25/2017	West End Synagogue		7,270 00
10/25/2017	JDC	JDC Russia	5,851 82
10/27/2017	Congregation Shenth Israel	Yahrzeit Mary Zimmerman	18 00
11/02/2017	Ron Clark Academy	In Memory of Scott Selig	180 00
11/02/2017	JDC	In Memory of Dr Harold Maidman	18 00
11/10/2017	Chase Sapphire	Jewish Federation Nashville	50 00
11/10/2017	Chase Sapphire	Jewish Federation of South Palm	100 00
11/10/2017	Chase Sapphire	Alzheimer's	100 00
11/10/2017	Chase Sapphire	Network for Good 888-284-7978	431 20
11/10/2017	Chase Sapphire	First Center	250 00
11/13/2017	AMEX 9007	Network for Good 888-284-7978	109 10
11/20/2017	The New Albany Community Foundation	In Honor of Les Wexner	5,000 00
11/20/2017	Jewish Family Services - Ruth Rales	In Membory of David Bernstein	36 00
11/20/2017	Chase Family	Network for Good	106 20
11/20/2017	Chase Family	B'nai Brith	350 00
12/12/2017	Leadership Nashville		100 00
12/12/2017	Ronald McDonald House Charities	In Memory of Steven Allen Feldman	100 00
12/12/2017	Jewish Family Services - Ruth Rales	In Memory of Anne Kalish	18 00
12/22/2017	The Nashville Holocaust Memorial	ATTN The Nashville Holocaust Memorial	100 00
12/22/2017	Chase Family	B'Nai Israel	1,800 00
12/22/2017	Chase Sapphire	Jewish Federation of South FL	300 00
12/22/2017	Chase Sapphire	HeroesCare	25 00
12/27/2017	Jewish Federation of Nashville/Middle TN		105,000 00
12/27/2017	United Way of Palm Bch County	Tocqueville Society	10,000 00
12/27/2017	Ruth Rales Jewish Family Services	Thanksgiving 2017	33,362 22
01/04/2018	Akiva School	In Memory of Dr Herman Jacob Kaplan	18 00
01/04/2018	West End Synagogue	In Memory of Minnette Funt Shepard	18 00
01/04/2018	Jewish Federation of South Palm Beach	In Memory of Moms Schnur	18 00
01/04/2018	Jewish Federation of South Palm Beach	In Memory of Richard "Dick" Siemens	18 00
01/04/2018	JDC	In Memory of Honey and Barry Sherman	100 00
01/12/2018	Alive Hospice	In Memory of Tatjana Kutilin Lukner	25 00
01/12/2018	Akiva School	In Memory of Dr Herman Kaplan	25 00
01/12/2018	Jewish Book Council		1,800 00
01/12/2018	Chase Sapphire	Foksbienne Yiddish Theater	1,300 00
01/12/2018	Chase Sapphire	Jewish Federation	100 00
01/12/2018	Chase Sapphire	St. Jude	25 00
01/12/2018	Chase Sapphire	Birthright Israel	6,000 00
01/20/2018	JDC	In Memory of Tzvia Bizur	18 00
01/20/2018	David Posnak JCC	In Honor of Heather and Randall Gilbert	180 00
01/22/2018	Adolph & Rose Levis JCC	In Honor of Emily & Stephen Grabelsky	180 00
01/22/2018	Columbus Foundation	In Memory of Rose Marie Blumstein	36 00
01/22/2018	Jewish Federation of Nashville/Middle TN	In Honor of Stephen Riven	100 00
01/25/2018	The Temple Congregation Ohabai Shalom	Annual Gift 2017 - FZ/SB	750 00
01/25/2018	Pardes Institute of Jewish Studies	2017 Annual Campaign - FZ	2,700 00
01/25/2018	Gordon Jewish Community Ctr of Nashville		903 00
01/28/2018	JDC	In Memory of Judy Amit	18 00
01/28/2018	United States Holocaust Museum	Membership# 13376611	200 00
01/30/2018	University School of Nashville	2018-Payment 3	5,000 00
02/05/2018	B'nai Torah Congregation	In Memory of Jeffrey Gerstin	18 00
02/05/2018	West End Synagogue	In Memory of Steve Dansky	18 00
02/05/2018	West End Synagogue	In Memory of Steve Dansky	18 00

Raymond Zimmerman Family Foundation
Transaction Detail by Account
June 2017 through May 2018

Date	Name	Memo	Paid amount
02/05/2018	St George's Episcopal Church	In Memory of Betty Brown Perkins	25 00
02/07/2018	AMEX 9007	I am Hillel	360 00
02/18/2018	B'nai Torah Congregation	In Memory of Betty Grodin	18 00
02/18/2018	Chase Sapphire	Jewish Federation of SFL	260 00
02/18/2018	Chase Sapphire	BT Run 888 385 1360	262 00
02/18/2018	Chase Sapphire	Down Syndrome	50 00
02/18/2018	Chase Sapphire	EB 67th Annual Nation 801-413-7200	500 00
02/18/2018	Chase Sapphire	All that Glitters	6,280 00
02/18/2018	Chase Sapphire	Sloan Kettering	100 00
02/18/2018	Chase Sapphire	Boca Raton Regional Hospital	1,000 00
02/18/2018	Chase Sapphire	American Cancer Society	50 00
02/22/2018	University of Miami		100 00
02/22/2018	JDC	In Memory of Colonel William A McDonald	18 00
02/26/2018	JDC	In Memory of Mrs Leslie Schultz	18 00
03/05/2018	The Temple Congregation Ohabai Shalom	The Temple Yahrzeit Fund	250 00
03/05/2018	AMEX 4005	Yashar Lachayal	180 00
03/05/2018	AMEX 4005	Jewish Book Council	500 00
03/05/2018	AMEX 9007	Breast Cancer	50 00
03/05/2018	AMEX 9007	ACTBLUECC	50 00
03/05/2018	AMEX 9007	St Baldricks	50 00
03/05/2018	JDC		9,474 00
03/06/2018	David Pratt	Paid through Venmo 8115 - Reimbursement	230 00
03/13/2018	Nashville Symphony	Patron ID 73529/Violins of Hope	2 500 00
03/28/2018	Jewish Family Services - Nashville	In Memory of Robert D Eisenstein	36 00
03/28/2018	Jewish Family Services/Popsie's Pantry	In Memory of Ronald M Popp	18 00
03/28/2018	Greater Miami Jewish Federation	In Memory of Bernyce Adler	18 00
04/06/2018	AMEX 4005	Levi's JCC	1,000 00
04/06/2018	AMEX 4005	Gamma Phi Beta	54 70
04/06/2018	AMEX 4005	Israel Tennis Center/Sponsorship	1,000 00
04/06/2018	AMEX 4005	Network for Good	500 00
04/06/2018	Memorial Sloan Kettering Cancer Center	In Memory of Bernard David Fradin	18 00
04/06/2018	B'nai Torah Congregation	In Memory of Herb Gilbert	18 00
04/06/2018	AMEX 9007	Network for Good	100 00
04/11/2018	B'nai Torah Congregation	In Memory of Dr Stephen Sackel	18 00
04/11/2018	Chase Sapphire	American Cancer Society	125 00
04/11/2018	Chase Sapphire	Network for Good	180 00
04/19/2018	Jewish Federation of South Palm Beach	In Memory of Kermit Halperin	18 00
04/19/2018	Chase Family	UM Athletic Ticket Donation	3,000 00
04/19/2018	Congregation Beth Israel	In Memory of Rudolf Kirschner	18 00
04/25/2018	Jewish Family Services - Ruth Rales	in Memory of Zelma Schwartz	18 00
04/25/2018	Bet Shalom Congregation	In Memory of Diane Carole Dolginow	36 00
04/25/2018	Council on Aging of Greater Nashville		100 00
04/30/2018	The Temple Congregation Ohabai Shalom		1,600 00
04/30/2018	Jewish Federation of Nashville/Middle TN	EZ 603072/Campaign 2018	6 800 00
04/30/2018	PENCIL Foundation	2018 Pledge	1,000 00
04/30/2018	Hillel International	In Honor of Carol and Irv Smokler	5,000 00
04/30/2018	Jewish Federation of Nashville/Middle TN	2018 Annual Campaign - RZ	12,500 00
04/30/2018	Jewish Middle School of Nashville	In Honor of Rabbi Saul Strosberg	1,000 00
04/30/2018	Jewish Federation of South Palm Beach	Raymond Zimmerman/2018 Annual Fund Traditional	12,500 00
04/30/2018	Jewish Federation of South Palm Beach	Etta Zimmerman/2018 Annual Fund Traditional	21 800.00
05/03/2018	AMEX 4005	Network for Good	50 00
05/03/2018	AMEX 4005	Delta Chi Marco Madness	107 00
05/03/2018	AMEX 4005	The Fellowship	1,000 00
05/03/2018	AMEX 4005	National MS Society	500 00
05/03/2018	AMEX 4005	JDC	800 00
05/03/2018	AMEX 4005	Lungstrong com	50 00
05/03/2018	AMEX 4005	ROHR Chabad	180 00
05/03/2018	AMEX 4005	Alzheimers Association	50 00
05/03/2018	AMEX 4005	Brest Cancer	20 00
05/03/2018	AMEX 4005	National Brain Tumor Association	50 00
05/03/2018	AMEX 4005	JAFCO	225 00
05/07/2018	American Cancer Society	Relay for Life, Danbury, CT	100 00

Raymond Zimmerman Family Foundation
Transaction Detail by Account
June 2017 through May 2018

	Date	Name	Memo	Paid amount
	05/09/2018	Jewish Family Services - Ruth Rales	In Memory of Shirley Lezell	18 00
	05/09/2018	JDC	In Memory of Rabbi Aaron Panken	100 00
	05/09/2018	American Heart Association	In Memory of John Frankle	36 00
	05/22/2018	Congregation Micah	In Memory of Helen Kaufman Farmer	36 00
	05/22/2018	Chase Sapphire	National MS Society	180 00
	05/22/2018	St Joseph's Catholic Church	In Memory of Victor Fonseca	50 00
	05/30/2018	B'nai Torah Congregation	In Memory of Ralph Kier	18 00
	05/30/2018	Shoshana S Cardin Jewish Leadership Inst	In Memory of Shoshana S Cardin	18 00
Total				475,678 36

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MORGAN STANLEY #2598	36,181.	2,885.	33,296.	33,296.	
NORTHERN TRUST	113,124.	4,920.	108,204.	108,204.	
TO PART I, LINE 4	149,305.	7,805.	141,500.	141,500.	

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INCOME	12.	12.	
TOTAL TO FORM 990-PF, PART I, LINE 11	12.	12.	

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	3,335.	1,667.		0.
TO FM 990-PF, PG 1, LN 16A	3,335.	1,667.		0.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	6,375.	3,188.		3,187.
TO FORM 990-PF, PG 1, LN 16B	6,375.	3,188.		3,187.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MORGAN STANEY #2795 - INVESTMENT FEES	10,700.	10,700.		0.
NORTHERN TRUST - INVESTMENT FEES	25,677.	25,677.		0.
TO FORM 990-PF, PG 1, LN 16C	36,377.	36,377.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
POSTAGE AND MAILINGS	105.	0.		0.
OTHER EXPENSES	672.	0.		0.
TO FORM 990-PF, PG 1, LN 23	777.	0.		0.

FOOTNOTES STATEMENT 7

TRANSFER OF ASSETS FROM A PREDECESSOR FOUNDATION

IN NOVEMBER OF 2017, THE ZIMMERMAN FOUNDATION (EIN 62-1058309) (THE "TRANSFEROR FOUNDATION") TRANSFERRED ALL OF ITS ASSETS TO THIS FOUNDATION (THE "TRANSFEREE FOUNDATION"). THE TRANSFEROR FOUNDATION WAS CONTROLLED BY THE SAME PERSONS THAT CONTROL THIS FOUNDATION. PURSUANT TO TREASURY REGULATION 1.507-3(A)(9)(I), THE TRANSFEREE FOUNDATION WILL BE TREATED AS IF IT WERE THE TRANSFEROR FOUNDATION AND WILL, THEREFORE, SUCEED TO THE CHARACTERISTICS OF THE TRANSFEROR FOUNDATION.

THE UNDISTRIBUTED INCOME LISTED ON PART XIII, LINE 2A OF THIS RETURN INCLUDES THE REMAINING UNDISTRIBUTED INCOME FROM THE FINAL RETURN OF THE TRANSFEROR FOUNDATION FOR THE YEAR ENDED NOVEMBER 30, 2017.

TOTAL AMOUNTS RECEIVED 1,417,428.

FORM 990-PF OTHER INCREASES IN NET ASSETS OR FUND BALANCES STATEMENT 8

DESCRIPTION	AMOUNT
RECEIPT OF ASSETS FROM PRIOR FOUNDATION - SEE STATEMENT 7	1,417,428.
RECEIPT OF ASSETS FROM PRIOR FOUNDATION - SEE STATEMENT 7	2,447,214.
TOTAL TO FORM 990-PF, PART III, LINE 3	3,864,642.

FORM 990-PF CORPORATE STOCK STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
NORTHERN TRUST - SEE ATTACHED	4,717,579.	5,339,130.
MORGAN STANLEY #2795 - SEE ATTACHED	2,553,803.	2,976,798.
TOTAL TO FORM 990-PF, PART II, LINE 10B	7,271,382.	8,315,928.

FORM 990-PF OTHER INVESTMENTS STATEMENT 10

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
GEN SPRING - GCP SPV LTD	COST	4,006.	2,216.
TOTAL TO FORM 990-PF, PART II, LINE 13		4,006.	2,216.