Form 990-PF

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.

| For calendar year | 2018 or tax year beginning | | | , and en | ding | | |
|---|--|----------------------|--|--|--|--|--|
| Name of foundation A Employer identification number | | | | | | | number |
| • | SELMA KUPFER | BERG FA | WILY | | | | |
| FOUNDAT | | | | - | | 06-1636082 | |
| • | P O box number if mail is not del | | ddress) | | Room/suite | B Telephone number | 0.3 |
| | AVENUE, APT. | | | | | 212-473-36 | |
| | or province, country, and ZI | P or foreign po | ostal code | | | C If exemption application is pe | anding, check here |
| NEW YORK | | | 1-4-1-4 | | | | |
| G Check all that ap | | | Initial return of a fo | ormer public cr | iarity | D 1. Foreign organizations | , check here |
| | Final return | | Amended return | | | Foreign organizations me check here and attach co | eting the 85% test, |
| U. Chack hine of a | Address ch | | Name change empt private foundation | | | | • |
| H Check type of or | rganization. A Section (a)(1) nonexempt charitable | | Other taxable private founda | tion f | ρ_{ℓ} | E If private foundation sta | |
| | e of all assets at end of year | J Accounti | | Accru | al | under section 507(b)(1) | • • |
| (from Part II, col | - | | ther (specify) | Acciu | a. | F If the foundation is in a under section 507(b)(1) | |
| ►\$ | | | nn (d) must be on cash basis | s.) | | 1 011001 3000011 507 (6)(1) | (D), CHOOK HOTE |
| Part I Analysi | s of Revenue and Expenses | | (a) Revenue and | (b) Net inv | estment | (c) Adjusted net | (d) Disbursements |
| (The total | of amounts in columns (b), (c), and ily equal the amounts in column (a) | d (d) may not)) | expenses per books | incol | | income | for charitable purposes (cash basis only) |
| | tions, gifts, grants, etc., rece | | 0. | Crystan and | SCALAR COLOR | N/A | |
| | X if the roundation is not required t | | | | | | |
| 3 Interest on | savings and temporary | | 11,119. | 11 | ,119. | | STATEMENT 2 |
| - | s and interest from securities | S | 251,948. | 251 | ,948. | | STATEMENT 3 |
| 5a Gross re | nts | | | | | | |
| b Net rental | income or (loss) | | Manager and the second | | | nero periodica di care | |
| | (loss) from sale of assets not on t | | <51,950.> | | | Parameter and a suppression of the same of | STATEMENT 1 |
| b Gross sale | s price for all 2,112 | <u>,739.</u> | inimana ya kata kata kata kata kata kata kata | | | | |
| b assets on a Act chart | n net income (from Part IV, line 2) | | | 228 | 3,115. | | |
| 8 Net shor | t-term capital gain | | | | | | |
| | nodifications | | | | | | |
| 10a and allowa | s less returns inces | | the standard of the control of the c | dinical administra | Ju ng 100, 1779 (17 | verterpie-sense vitorial aminimi | |
| h Less Cost | hlos shoog to | | | mo vonomina de alors Montenae inclusiva | 1.171 27 17 | TO THE CONTRACTOR OF A | The state of the s |
| c Gross pr | ofit or (loss) | | | | | | |
| 11 Other inc | come | | | | | | |
| | dd lines 1 through 11 | _ | 208,117. | 491 | 182. | | |
| 13 Compense | ation of officers directors trustees | Gic | 0. | | 0. | | 0. |
| | ployee salaries and wages | | | | | | |
| 1 | plans, employee benefits | Ī | | | | | |
| 16a Legal-fee | 5 | ! ГМТ 4 | 10.050 | | 2 212 | | 0.707 |
| | | | 10,950. | 8 | , , = = • • | | 2,737. |
| © Other pro | ofessional fees | PMT 5 | 59,416. | 25 | ,416. | | 0. |
| o 17 Interest | 100 | FMT 6 | 22,107. | | 024 | | |
| 18_Taxes | | гмт 6 | 22,107. | _ | L,834. | · | 0. |
| | tion and depletion | | | | | | |
| 20 Occupan | onferences, and meetings | | | l | | | |
| ZI ITAVEI, C | onterences, and meetings and publications | | | | | | |
| 22 Printing 23 Other ex | | rm 7 | 9,333. | | 5,750. | | 2,583. |
| 23 Other ex | penses erating and administrative | / | ,,,,,,, | | <i>,,,</i> ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | 2,303. |
| | s Add lines 13 through 23 | | 101,806. | 76 | 5,213. | | 5,320. |
| O 25 Contribu | tions, gifts, grants paid | | 295,000. | , (| ., | | 295,000. |
| 25 (0)11/100 | penses and disbursements. | | 255,000. | | | | 255,000. |
| 4 | s 24 and 25 | | 396,806. | 76 | 5,213. | | 300,320. |
| | line 26 from line 12; | | 320,000. | ger maketing trade hand | ********** | | 300,320. |
| 1 - | revenue over expenses and disbur | samanis | <188,689.> | | | | |
| — | stment income (if negative, ent | | , | 414 | 1,969. | | |
| | net income (if negative, enter | | | | | N/A | |

823501 12-11-18 LHA For Paperwork Reduction Act Notice, see instructions

Form 990-PF (2018)

MAX AND SELMA KUPFERBERG FAMILY

| Pearl III Balance Sheets States southers and month in the demands (1) 500 vibrate (1) 5 | For | 1636082 Page 2 | | | | |
|--|-------------------------|----------------|--|--|---|---------------------------------------|
| Custar - non-interest-beams | Part III Dalance Sheets | | | | | f year |
| 2 Swings and temporary cash mestments 1,092,681. 547,983. 547,983. 3 Accounts incomate for doubtful accounts ► Less allowance for doubtful accounts ► Precipes recentable № 1 Recurrenable obe from officers, directors, trustees, and other disqualified persons 7 Owner are return scenario 1 Investments - U.S. and sites personnes 2 Investments - U.S. and sites personnes 2 Investments - Corporate blonds 2 Investments - Corporate blonds 2 Investments - Corporate blonds 3 Investments - Corporate blonds 3 Investments - Corporate blonds 5 TMT 9 11 Investments - Corporate blonds 5 TMT 10 16 June - Stand - Corporate blonds 17 Investments - Corporate blonds 18 Investments - Corporate blonds 19 Investments - Corporate blonds 19 Investments - Corporate blonds 10 Investments - Corporate blonds 10 Investments - Corporate blonds 11 Investments - Corporate blonds 12 Investments - Corporate blonds 13 Investments - Corporate blonds 14 Investments - Corporate blonds 15 Officer scenario 16 Other assets (describe ▶ DUE PROM BROKER) 16 Treat assets (be be completed by all filters - see the instructions. Also, see apage 1, item 1) 17 Accounts provide and corporate by all filters - see the instructions. Also, see apage 1, item 1) 18 Accounts and the corporate by all filters - see the instructions. Also, see apage 1, item 1) 19 Obstrace Toronals 22 Other labilities (add lines 17 through 22) 23 Investments that Illow FAS 117, check here and complete lines 27 through 31 24 Unrestituted and elements and expensed of proving and expensed fluid and complete lines 27 through 32 25 Personations that Illow FAS 117, check here and complete lines 27 through 31 26 Carporal stands. Investments and net assets from the balances 1 Total inate assets or fund balances at beginning of year - Part II, column (a), line 30 (inust agree with end-clysex fluid responded on prior year's return) 2 | S . | ai'r | column should be for end-of-year amounts only | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| A Accurate is convolate Less calcurates to possibility accounts Less calcurates for eductiful accounts Less calcurates Less calcurates | | 1 | Cash - non-interest-bearing | | | |
| Less allowance for doubtful accounts Hedges receivable Hedge | | 2 | Savings and temporary cash investments | | 547,983. | 547,983. |
| A Pleages receivable | | 3 | Accounts receivable | Company of the Compan | A TO THE STATE OF THE PARTY OF | |
| Exercise converted to country accounts S Grants reconsible due from officers, directors, trustees, and other degualited persons To the reast scharteneous S Investments of sale or use B Investments - Us and state government abligations In investments - Us and state power board It is investments - corporate stock Investments - other STMT 9 | | | Less; allowance for doubtful accounts | | | |
| 5 Crants recovable 6 Recovables due from officers, directors, trustess, and other disqualified persons 7 One roar selectant control of the c | | 4 | Pledges receivable ▶ | and the second s | 0.000 | |
| Receasibles due from officers, directors, trustees, and other disqualified persons 7 the new selesia streaming test, and other disqualified persons 8 Inventions of orable or use 9 Pragard expenses and deferred charges 10a Investments - Oraproate stock 10a Investments - Comporate bonds 10a Investments - Comporate bonds 11 Investments - Comporate bonds 12 Investments - Comporate bonds 13 Investments - Oraproate stock 14 Land, buildings, and equipment busis 15 Comporate - DUE FROM BROKER 15 Comporate - DUE FROM BROKER 15 Comporate - DUE FROM BROKER 16 Tatal assets (no be completed by all filers - see the instructions, Allo, see page 1, item 1) 17 Accounts payable and accounted abytimes - see the instructions, Allo, see page 1, item 1) 18 Tatal assets (no be completed by all filers - see the instructions, Allo, see page 1, item 1) 19 Deferred revenue 10 Universified - DUE FROM BROKER 10 Carist payable and accounted appearses 10 Carist payable and accounted appearses 10 Officer assets (no be completed by all filers - see the instructions, Allo, see page 1, item 1) 10 Accounts payable and accounted appearses 11 Mortagea and other notice payable 12 Other labilities (add lines 17 through 22) 13 Total Itabilities (add lines 17 through 25) 14 Complete lines 24 through 26, and lines 30 and 31 15 Complete lines 24 through 26, and lines 30 and 31 15 Complete lines 27 through 31 16 Complete lines 27 through 31 16 Complete lines 27 through 31 17 Capital stabilities and net assets/fund balances 18 A, 461, 988. 18, 409, 121. 18 A, 461, 988. 18, 273, 299. 19 Control of Changes in Net Assets or Fund Balances 19 Control of Changes in Net Assets or Fund Balances 10 Total net assets or fund balances at beginning of year - Part If, column (a), line 30 17 Capital assets or fund balances at beginning of year - Part If, column (b), line 30 18 Add lines 1, 2, and 3 19 Capital stock or fund balances at beginning of year - Part If, column (b), line 30 18 Add lines 1, 2, and 3 19 Capital stock or fund balances at end of year (line 4 minus l | | | Less; allowance for doubtful accounts | | | |
| The state of th | | 5 | Grants receivable | | | |
| 7 Purpose depends and deterred charges | | 6 | Receivables due from officers, directors, trustees, and other | | | |
| Less, allowance for doubtful accounts | | | disqualified persons | | | |
| Total lassets (to be completed by all filters - see the saturations, Also, see page 1, item 1) Total lassets (describe 20 Total lates or fund balances at lates or fund balances 31 Total lates for fund balances at laten and and accorded in line 2 (termize) 10 10 10 10 10 10 10 1 | | 7 | Other notes and loans receivable | | | |
| Prepart expenses and deterred charges | | | Less, allowance for doubtful accounts | | | |
| Total assets (obe completed by all hiers - see the instructions. Also, see page 1, tem 1) | ş | 8 | | | | · · · · · · · · · · · · · · · · · · · |
| Total assets (obe completed by all hiers - see the instructions. Also, see page 1, tem 1) | SSE | 9 | · · · · | | | |
| c Investments - corporate bonds 11 Investments - last buildage, not equament basis Last screenfeld degreaces 12 Investments - mortgage loans 13 Investments - other 13 Investments - other 14 Land, buildings, and equament basis Last screenfeld by a life of the screenfeld by a life o | ⋖ | 10a | | | 4 204 462 | 2 22 2 2 2 2 |
| 11 Investments - Uniforgo and equipment basis Less activabilities (page loans 1 1 1 1 1 1 1 1 1 | | b | The second secon | | 4,324,163. | 3,996,350. |
| Test accountained deprecation Test investments - other Test | | C | Investments - corporate bonds STMT 9 | 2,794,057. | 3,240,5/3. | 3,084,449. |
| 12 Investments - mortgage loans 13 Investments - other STMT 10 169,496. 159,310. 150,413. | | 11 | Investments - land, buildings, and equipment basis | | | |
| 13 Investments - other STMT 10 169,496. 159,310. 150,413. 14 Land, buildings, and equipment basis Less excended sepression | | | | | | |
| 14 Land, buildings, and equipment basis | | Ι. | cmm 10 | 160 406 | 150 210 | 150 412 |
| tes accomulated deprenation 15 Other assets (describe ▶ DUB FROM BROKER) 5,550. 1,270. 1,270. 16 Total assets (do to completed by all liters - see the instructions. Also, see page 1, item 1) 17 Accounts payable and accrued expenses 18 Grants payable and accrued expenses 19 Deferred revenue 20 Chears from officers, dreactors, flustices, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (add lines 17 through 22) 0. 0. 23 Total liabilities (add lines 17 through 22) 0. 0. 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 27 Expensive the season of the complete lines 27 through 31 28 Pard-in or capital surplus, or land, blidg, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 29 Retained earnings, accumulated income, endowment, or other funds 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 8, 461, 988. 8, 273, 299. 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) 20 Enter amount from Part I, line 27a 30 Other increases not included in line 2 (itemize) ▶ 31 Total lines 1, 2, and 3 4 8, 273, 299. 5 Decreases not included in line 2 (itemize) ▶ 5 Decreases not included in line 2 (itemize) ▶ 5 Decreases not fund balances at end of vear (line 4 minus line 5) - Part III, column (b), line 30 6 8, 273, 299. 6 Total net assets or fund balances at end of vear (line 4 minus line 5) - Part III, column (b), line 30 6 8, 273, 299. | | l | _ | THE TANK FROM THE PROPERTY OF | C. N. A. CO. A SERVICIONAL A. C. PR. PROMODINAL CO. CAMP. PROJ. MICH. MICH. | 150,413. |
| 15 Other assets (describe ▶ DUE FROM BROKER) 5,550. 1,270. 1,270. 1,270. 16 Total assets (to be completed by all filters - see the instructions. Also, see page 1, them 1) 8,461,988. 8,273,299. 7,780,465. 17 Accounts payable and accrued expenses 18 Grants payable 9 Deferred revenue 20 Leans bor officers, directors, flustess, and other dequalified persons 21 Mortgages and other notes payable 20 Other liabilities (describe ▶ 20 Other liabilities (describe ▶ 21 Total liabilities (add lines 17 through 22) 0. 0. 0. | | 14 | | TOREST COMMUNICATIVE STATE | | |
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| Instructions. Also, see page 1, item I) | | | | 3,330. | 1,270. | 1,270. |
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| B Grants payable Deterred revenue Deterred | | 17 | | 0,401,500. | 0,213,233. | 7,700,403. |
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| Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 31 Total liabilities and net assets/fund balances 31 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 O. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 8, 273, 299. | Ses | 24 | Unrestricted | | | |
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| Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 31 Total liabilities and net assets/fund balances 31 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 O. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 8, 273, 299. | Ва | 26 | | · · · · · · · · · · · · · · · · · · · | | |
| 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 Total net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 8, 273, 299. | P | | · | | | |
| 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 Total net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 8, 273, 299. | Ē | | • | 0 400 101 | 0 400 101 | |
| Total net assets or fund balances 31 Total liabilities and net assets/fund balances 8,461,988. 8,273,299. 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 8,273,299. | | l | | | | |
| Total net assets or fund balances 8,461,988. 8,273,299. Rart 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 3 0.4 4 Add lines 1, 2, and 3 4 8,273,299. 5 Decreases not included in line 2 (itemize) ▶ 5 0. 6 Total net assets or fund balances at beginning of year - Part II, column (b), line 30 8,461,988. 8,273,299. | SSe | l | | | | |
| 31 Total liabilities and net assets/fund balances 8,461,988. 8,273,299. 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 8 , 461,988. 8, 273,299. | Ä | l | | | | |
| 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 O. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 1 8, 461, 988. 2 <188, 689.> 3 O. 4 8, 273, 299. | ž | 30 | Total net assets or fund dalances | 0,401,300. | 0,213,299. | |
| 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) 2 Enter amount from Part I, line 27a 2 <188,689.> 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 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 8,273,299. | | | Tatal linkilising and not constributed belongs | 8 461 988 | 8 273 299 | |
| 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 Oc. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 1 8, 461, 988. 2 <188,689.> 3 O. 4 8,273,299. | _ | | | | 0,2/3,255. | |
| (must agree with end-of-year figure reported on prior year's return)18,461,988.2Enter amount from Part I, line 27a2<188,689.>3Other increases not included in line 2 (itemize)30.4Add lines 1, 2, and 348,273,299.5Decreases not included in line 2 (itemize)50.6Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 3068,273,299. | 2 | art | Analysis of Changes in Net Assets or Fund B | aiances | | |
| (must agree with end-of-year figure reported on prior year's return)18,461,988.2Enter amount from Part I, line 27a2<188,689.>3Other increases not included in line 2 (itemize)30.4Add lines 1, 2, and 348,273,299.5Decreases not included in line 2 (itemize)50.6Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 3068,273,299. | 1 | Total | net assets or fund balances at beginning of year - Part II, column (a), line | 30 | | |
| 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 3 0.4 4 Add lines 1, 2, and 3 4 8, 273, 299. 5 Decreases not included in line 2 (itemize) ▶ 5 0.6 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 8, 273, 299. | | | | | 1 | 8,461,988. |
| 3 Other increases not included in line 2 (itemize) ► 3 O. 4 Add lines 1, 2, and 3 4 8,273,299. 5 Decreases not included in line 2 (itemize) ► 5 O. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 8,273,299. | 2 | • | | | 2 | |
| 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 8, 273, 299. | 3 | Othe | r increases not included in line 2 (itemize) | | 3 | 0. |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 8, 273, 299. | | | , · | | 4 | |
| | | | | | | |
| , non he | <u>6</u> _ | Total | net assets or fund balances at end of year (line 4 minus line 5) - Part II, c | olumn (b), line 30 | 6 | |

06-1636082 Page 3

| Part IV Capital Gains | and Losses for Tax on | Investment | Income | | | | | | |
|--|---|---|-------------------------------------|--------------|----------------------------|-----------------------------|-----------------------|-----------------------------|--|
| | the kind(s) of property sold (for a arehouse; or common stock, 200 | | te, | (b) | low ac - Purc - Dona | nase ' | c) Date a (mo., da | | (d) Date sold (mo., day, yr) |
| 1a PUBLICLY TRADED SECURITIES P | | | | | İ | | | | |
| b PUBLICLY TRADED SECURITIES D | | | | | | | | | |
| c CAPITAL GAINS I | DIVIDENDS | | · | | | | | | |
| _d | , , , , , , , , , | | | <u> </u> | | | | | |
| <u>e</u> | | | | L_, | | | | | |
| (e) Gross sales price | (f) Depreciation allowed (or allowable) | plus e | st or other basis xpense of sale | | | | | ın or (loss) (f) mınus (| 9)) |
| a 1,902,685. | | | 1,867,78 | | | | | | 34,901. |
| ь 193,634. | | | 16,84 | 0. | | | | | 176,794. |
| <u>c</u> 16,420. | | | | | | | | | 16,420. |
| <u>d</u> | | | | | | | | | |
| e | | husba fauradata a | 40/04/00 | | | | | | |
| Complete only for assets snowin | ng gain in column (h) and owned | | | - | | | | ol (h) gain ot less thar | |
| (i) FMV as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | | cess of col (i) col (j), if any | _ | | | | from col. (| h)) |
| <u>a</u> | | | | _ | | | | | 34,901. |
| <u>b</u> | | | | | | | | | 176,794. |
| <u>C</u> | | | | | | | | | 16,420. |
| <u>d</u> | | | | | | | | | |
| <u>e</u> | <u> </u> | | | _ | | | | | |
| 2 Capital gain net income or (net ca | | nter in Part I, line r -0- in Part I, line | | } | 2 | | | | 228,115. |
| 3 Net short-term capital gain or (los if gain, also enter in Part I, line 8, | • |) and (6): | | ال | | | | | |
| If (loss), enter -0- in Part I, line 8 | | | | Д | 3 | | | N/A | |
| Part V Qualification U | nder Section 4940(e) t | or Reduced | Tax on Net I | nve | stm | ent Incor | ne | | |
| (For optional use by domestic private if section 4940(d)(2) applies, leave the foundation liable for the section | his part blank. | ., | | | , | | | | Yes X No |
| Was the foundation liable for the sectif "Yes," the foundation doesn't qualif Enter the appropriate amount in a | y under section 4940(e). Do not | complete this part | · · · | | | | | | TES A NO |
| | 1 | ie ilisti uctions del | ore making any en | | | | Γ | | (d) |
| (a) Base period years Calendar year (or tax year beginnii | ng in) Adjusted qualifying | | Net value of no | | ıtable- | | (| Distrib col (b) div | (d) oution ratio ided by col. (c)) |
| 2017 | | 97,357. 98,970. | | | | <u>3,077.</u> | - | | .015397 |
| 2016 | | 49,179. | | | | 1,619. 5,244. | <u> </u> | | .052045 |
| 2015 | | 41,140. | <u> </u> | | | 5, <u>244.</u> 5,423. | - | | .024525 |
| 2014 | | 94,975. | | | | 5,423. 6,926. | 1 | | .051703 |
| 2013 | | <u> </u> | | | , 03 | 0,520. | | | |
| 2 Total of line 1, column (d)3 Average distribution ratio for the | • | tal on line 2 by 5 (|), or by the numbe | er of y | ears/ | | 2 | | .165843 |
| the foundation has been in exister | nce if less than 5 years | | | | | | 3 | | .033169 |
| 4 Enter the net value of noncharitab | ole-use assets for 2018 from Part | X, line 5 | | | | | 4 | | 8,319,925. |
| 5 Multiply line 4 by line 3 | | | | | | | 5 | | 275,964. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | | | | 6 | | 4,150. | | | |
| 7 Add lines 5 and 6 | | | | | | | 7 | | 280,114. |
| 8 Enter qualifying distributions from Part XII, line 4 | | | | 8 | | 300,320. | | | |
| If line 8 is equal to or greater than See the Part VI instructions. | n line 7, check the box in Part VI, | line 1b, and comp | elete that part usin | g a 1 | % tax r | ate. | | | |
| 823521 12-11-18 | <u></u> | | | | | | | F | orm 990-PF (2018) |

MAX AND SELMA KUPFERBERG FAMILY 7
FOUNDATION

| | 990-PF (2018) FOUNDATION | | 340/11 4040/ | | 6-1636 | | Page 4 | |
|-----------|--|--------------------|-------------------------------|-----------|-----------|------------|-------------|---|
| Pa | Excise Tax Based on Investment Income (Section 4940) | a), 49 | 340(b), 4940(e), oi | 4948 | उ - see ॥ | nstruction | s) | |
| 1a | Exempt operating foundations described in section 4940(d)(2), check here 🕨 👚 and ent | ter "N/A | " on line 1. | | | | | |
| | Date of ruling or determination letter: (attach copy of letter if nece | | | | | | | |
| b | Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕒 🕨 | X | and enter 1% | | 1 | 4,1 | <u>50.</u> | |
| | of Part I, line 27b | | | | | | | 4 |
| 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; other | ers, ent | er -0-) | | 2 | | 0. | |
| 3 | Add lines 1 and 2 | | | | 3 | 4,1 | 50. | |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; oth | ners, en | ter -0-) | | 4 | | 0. | |
| 5 | Tax based on investment income Subtract line 4 from line 3 If zero or less, enter -0- | | | | 5 | 4,1 | 50. | |
| _ | Credits/Payments; | | | | | | | |
| | 2018 estimated tax payments and 2017 overpayment credited to 2018 | 6a | 10,70 | 0. | | | | |
| | Exempt foreign organizations - tax withheld at source | 6b | | 0. | | | | |
| | Tax paid with application for extension of time to file (Form 8868) | 6c | | 0. | | | | |
| | Backup withholding erroneously withheld | 6d | | 0. | | | | |
| | Total credits and payments Add lines 6a through 6d | | | | 7 | 10,7 | 00. | |
| | Enter any penalty for underpayment of estimated tax. Check here | hed | | | 8 | | 0. | |
| | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | | | ▶├ | 9 | | | |
| | Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | | | | 10 | 6,5 | 50. | |
| | Enter the amount of line 10 to be: Credited to 2019 estimated tax | | 6,550. Refunded | | 11 | | 0. | |
| | TVII-A Statements Regarding Activities | | o / 550 t Rejulided | | | | | |
| · · · · · | During the tax year, did the foundation attempt to influence any national, state, or local legisla | ation or | did it participate or inter | rene in | | Yes | No | |
| 14 | any political campaign? | 20011 01 | and it participate or inter | ,0110 111 | | 1a | X | |
| | Did it spend more than \$100 during the year (either directly or indirectly) for political purpose | موک جمو | the instructions for the | iefinitio | ın | 1b | X | |
| U | If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of | | | | " | 10 | | |
| | distributed by the foundation in connection with the activities. | 1 411 y 111 | aterials published of | | | | | |
| | Did the foundation file Form 1120-POL for this year? | | | | | 1c | X | |
| | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the y | 103E | | | | 10 | | |
| 0 | (1) On the foundation. \blacktriangleright \$ (2) On foundation managers. | | | 0. | | | | |
| _ | Enter the reimbursement (if any) paid by the foundation during the year for political expendition | | | <u> </u> | | | | |
| е | managers > \$ 0. | UI G LAX | imposed on loundation | | | | | |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IR: | S ? | | | | 2 | X | |
| 2 | If "Yes," attach a detailed description of the activities | • | | | | | | |
| 2 | Has the foundation made any changes, not previously reported to the IRS, in its governing in | strume | nt articles of incornoration | n. or | | | | |
| • | bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | | ing antioned of moor person | , 0. | | 3 | X | |
| Ao | Did the foundation have unrelated business gross income of \$1,000 or more during the year | ? | | | | 4a | X | |
| | If "Yes," has it filed a tax return on Form 990-T for this year? | | | | N/A | 4b | | |
| | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | | | | | 5 | Х | |
| J | If "Yes," attach the statement required by General Instruction T | | | | | | | |
| 6 | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied eith | her- | | | | | | |
| u | By language in the governing instrument, or | | | | | | | |
| | By state legislation that effectively amends the governing instrument so that no mandatory | direction | ons that conflict with the | state la | w | | | |
| | remain in the governing instrument? | a., 55t. | ono mai oomioi min mo | | - | 6 X | | |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," compl | ete Par | t II col (c) and Part XV | | | 7 X | \vdash | |
| • | Did the foundation have at least 40,000 in assets at any time suring the year. If 100, some | 010 1 01 | t 11, 001. (0), and 1 are 110 | | | - | | |
| Q a | Enter the states to which the foundation reports or with which it is registered. See instruction | ns 🕨 | | | | | | |
| ψđ | NY | | | | | | | |
| h | If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the At | tornev | General (or designate) | | | | | |
| U | of each state as required by General Instruction G? If "No," attach explanation | | | | | 8b X | 44444 | |
| ۵ | Is the foundation claiming status as a private operating foundation within the meaning of sec | tion 49 | 142(1)(3) or 4942(1)(5) for | calend: | ar | | 2.00 | ٩ |
| J | year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," comp | | | 34.01141 | | 9 | X | 7 |
| 10 | Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule | | | | | 10 | X | • |
| | City with become properties approximate doubt page of a grant a seried min and low in 162 arrant a seried min | | | | F | orm 990-PF | | |
| | | | | | • | | , | |

| Pε | irt VII-A Statements Regarding Activities (continued) | | | |
|-----|--|------------------|----------------|-------------|
| | | Y | es | 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? | | \dashv | |
| 12 | If "Yes," attach statement. See instructions | 12 | | Х |
| | | 13 2 | , | <u>~</u> |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | 13 4 | <u> </u> | |
| | Website address N/A | 72 260 | 12 | |
| 14 | The books are in care of ► SAUL KUPFERBERG Telephone no. ► 212-4 | | 13 | |
| | Located at ► 252 7TH AVENUE, APT. 14B, NEW YORK, NY ZIP+4 ►10 | 1001 | | |
| 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 | N/2 | _ | |
| 16 | At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, | Y. | es | No |
| | securities, or other financial account in a foreign country? | 16 | - CO. 64 L. | X |
| | See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the | | | |
| - T | foreign country | | | |
| Rε | int VII-B Statements Regarding Activities for Which Form 4720 May Be Required | T 30 200 11 T | | |
| | File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. | Y | es | No |
| 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 X No | | | |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) | | ŀ | |
| | a disqualified person? Yes $\overline{\mathbf{X}}$ No | | | |
| | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No | | | |
| | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? X 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)? | | | |
| | (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.) | | | |
| ь | If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations | | | |
| | section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions | 1b | | X |
| | 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 2018? | 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)): | | | |
| а | At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning | | | |
| | before 2018? | | | |
| | If "Yes," list the years | | | |
| h | 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 | | | |
| • | • | | | |
| 20 | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | |
| 0.0 | during the year? Yes X No | | | |
| | of "Yes," did it have excess business holdings in 2018 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, | | | |
| | | O.L | | لتنبع |
| 4 | · | 3b | -+ | |
| | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | 4a | | X |
| | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that | | | v |
| | had not been removed from jeopardy before the first day of the tax year beginning in 2018? | 4b | | <u>X</u> |
| | h i | orm 990-l | - - (| 2018) |

Page 6

| Part VII-B Statements Regarding Activities for Which F | orm 4720 May Be Re | equired (continu | ued) | |
|--|------------------------------------|-----------------------------|--|------------------------------|
| 5a During the year, did the foundation pay or incur any amount to: | - | | | Yes No |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (section | 4945(e))? | Ye | es X No | |
| (2) Influence the outcome of any specific public election (see section 4955); or | to carry on, directly or indire | | | |
| any voter registration drive? | | | es 🔀 No 🛙 | |
| (3) Provide a grant to an individual for travel, study, or other similar purposes | | Ye | es X No | |
| (4) Provide a grant to an organization other than a charitable, etc., organization | described in section | | | |
| 4945(d)(4)(A)? See instructions | | Ye | es 🗶 No 📳 | |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, | or educational purposes, or fo | | | |
| the prevention of cruelty to children or animals? | | | es 🗶 No | |
| b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und | • | n Regulations | | |
| section 53.4945 or in a current notice regarding disaster assistance? See instru | | | N/A | 5b |
| Organizations relying on a current notice regarding disaster assistance, check h | | | | |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr | | | | |
| expenditure responsibility for the grant? | N | Ī/ A | es 🔛 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 p | pay premiums on | г | િજા | |
| a personal benefit contract? | | Y6 | es X No | , V |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a p | ersonal benefit contract? | | | 6b X |
| If "Yes" to 6b, file Form 8870 | halter transaction? | V | es X No | |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax s | | 11 | | 7b |
| b If "Yes," did the foundation receive any proceeds or have any net income attribu | | | N/A | 70 |
| 8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$ | 1,000,000 in remoneration of | | es X No | |
| excess parachute payment(s) during the year? Part VIII Information About Officers, Directors, Truste | es. Foundation Mar | | :S _ZX NU | 12 |
| Paid Employees, and Contractors | | go.o,g, | | |
| 1 List all officers, directors, trustees, and foundation managers and the | eir compensation. | | | |
| | (b) Title, and average | (c) Compensation | (d) Contributions to employee benefit plans | (e) Expense account, other |
| (a) Name and address | hours per week devoted to position | (If not paid, enter -0-) | and deferred compensation | allowances |
| SAUL KUPFERBERG | TRUSTEE | | | |
| 252 7TH AVENUE APT. 14B | | | | |
| NEW YORK, NY 10001 | 5.00 | 0. | 0. | 0. |
| RHODA KUPFERBERG JOSS | TRUSTEE | | | |
| 810 CONCORD STREET | | _ | _ | _ |
| CARLISLE, MA 01741 | 2.00 | 0. | 0. | 0. |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| 2 Compensation of five highest-paid employees (other than those inc | luded on line 1). If none, | enter "NONE." | | |
| | (b) Title, and average | | (d) Contributions to employee benefit plans | (e) Expense |
| (a) Name and address of each employee paid more than \$50,000 | hours per week devoted to position | (c) Compensation | and deterred compensation | account, other allowances |
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |
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| | | ļ | | |
| | | | | |
| | | | - | |
| | - | | | |
| The supplier of other ampleurs and supplier of the supplier of | 1 | | | 0 |
| Total number of other employees paid over \$50,000 | | | Corre | 990-PF (2018) |
| | | | rorm | 200-FT (2018) |

MAX AND SELMA KUPFERBERG FAMILY

| Form 990-PF (2018) FOUNDATION | 06-1 | 1636082 Page 7 |
|---|---------------------|---------------------------|
| Part VIII Information About Officers, Directors, Trustees, Foundation 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 | | |
| | | |
| | | |
| 1 | | |
| | - | |
| Total number of others receiving over \$50,000 for professional services Part IX A Summary of Direct Charitable Activities | | ▶ 0 |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistic number of organizations and other beneficiaries served, conferences convened, research papers produ | | Expenses |
| 1 NONE | | |
| 2 | | 0. |
| | | |
| 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 life. | nes 1 and 2. | Amount |
| 1 NONE | | |
| 2 | | 0. |
| | | |
| All other program-related investments See instructions. 3 | | |
| | | |
| | | |
| Total. Add lines 1 through 3 | > | 0. |
| | | Form 990-PF (2018) |

06-1636082

Page 8

| P | Minimum Investment Return (All domestic foundations must complete this part. Foreign four | ndations, s | ee instructions) |
|----|---|---------------|------------------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | |
| а | Average monthly fair market value of securities | 1a | 7,766,776. 679,848. |
| b | Average of monthly cash balances | 1b | 679,848. |
| C | Fair market value of all other assets | 1c | |
| d | Total (add lines 1a, b, and c) | 1d | 8,446,624. |
| е | 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 | 8,446,624. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 126,699. |
| 5 | Net value of noncharitable-use assets Subtract line 4 from line 3 Enter here and on Part V, line 4 | 5 | 8,319,925. |
| 6 | Minimum investment return Enter 5% of line 5 | 6 | 415,996. |
| P | Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations at foreign organizations, check here and do not complete this part.) | nd certain | |
| 1 | Minimum investment return from Part X, line 6 | 1 | 415,996. |
| 2a | Tax on investment income for 2018 from Part VI, line 5 2a 4,150. | | |
| Ь | Income tax for 2018. (This does not include the tax from Part VI) | 1 1 | |
| C | Add lines 2a and 2b | 2c | 4,150. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 411,846. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 411,846. |
| 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 | 411,846. |
| P | 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 | <u>3</u> 00,320. |
| 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: | | |
| а | 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 | 300,320. |
| 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 | 4,150. 296,170. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 296,170. |
| | 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 |
| | 4040(a) reduction of tax in those years | | |

Form 990-PF (2018)

Part XIII Undistributed Income (see instructions)

| | (a) Corpus | (b) Years prior to 2017 | (c) 2017 | (d) 2018 |
|---|--|--|--|---|
| 1 Distributable amount for 2018 from Part XI, | | | | |
| line 7 | | | | 411,846. |
| 2 Undistributed income, if any, as of the end of 2018 | | | 005 000 | |
| a Enter amount for 2017 only | | | 295,208. | |
| b Total for prior years: | | 0. | | |
| 3 Excess distributions carryover, if any, to 2018 | TOTAL CONTROL OF THE STATE OF T | and the second s | | with the second |
| a From 2013 | a minimum or year and a manufactured to | | | and 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 |
| b From 2014 | | | | |
| e From 2015 | nemaka mana ang paga ang managang kama kara dalah kara dalah kara | Committee Commit | | |
| d From 2016 | (Changaga) and ang a section of a | Ayr 1477 - Sad washing Walley (1971) | Andrews Committee Committe | |
| e From 2017 | | | | |
| t fotal of lines 3a through e | 0. | 0.000000000 | Commonwhater 192 | |
| 4 Qualifying distributions for 2018 from | | | | |
| Part XII, line 4: ►\$ 300,320. | | | 205 200 | |
| a Applied to 2017, but not more than line 2a | | | 295,208. | |
| b Applied to undistributed income of prior | | 0. | | |
| years (Election required - see instructions) c Treated as distributions out of corpus | | 0. | once and the second | |
| (Election required - see instructions) | 0. | | Carrier of the Section of the Sectio | |
| d Applied to 2018 distributable amount | | | | 5,112. |
| e Remaining amount distributed out of corpus | 0. | | | |
| 5 Excess distributions carryover applied to 2018 | 0. | | | 0. |
| (If an amount appears in column (d), the same amount must be shown in column (a)) | | Asserting the Asserting Control of the Asserti | | |
| 6 Enter the net total of each column as indicated below: | | | | |
| 2 Corpus Add lines 3f, 4c, and 4e Subtract line 5 | ĺ ô. | operiorite illingio productioni della compania dell | | |
| 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 | | 0. | | |
| amount - see instructions | | 0. | | |
| e Undistributed income for 2017 Subtract line | | | 0. | |
| 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2018. Subtract | | | 0. | |
| lines 4d and 5 from line 1. This amount must | | | | |
| be distributed in 2019 | | | | 406,734. |
| 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 2013 | | | | |
| not applied on line 5 or line 7 | 0. | | | |
| 9 Excess distributions carryover to 2019 Subtract lines 7 and 8 from line 6a | 0. | | | |
| 10 Analysis of line 9. | 7 | | | |
| a Excess from 2014 | turing the second control of | | | |
| b Excess from 2015 | Age of the set of the second and the second | ************************************** | | unger-up (n.c.) (3. kg/m/g-r/m/g-m/m pungu ing muli (n.c.) (2. m/g-r/m/g-m/m |
| c Excess from 2016 | AND THE STREET, N. S. A. | ora di programa di Proper I di problema. | on a markamenta (1946) Salaman (1946) Salamana (1944) | The state of the four wines and a |
| d Excess նտու 2017 | an in course | and a manager appears and a | and very surperference of the con- | . Sections of the Section Control of |
| e Excess from 2018 | | | | 5 000 PE (0)40) |

MAX AND SELMA KUPFERBERG FAMILY 06-1636082 FOUNDATION Page 10 Form 990-PF (2018) 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 2018, enter the date of the ruling b Check box to indicate whether the foundation is a private operating foundation described in section 4942(i)(3) or 4942(1)(5) Prior 3 years 2 a Enter the lesser of the adjusted net Tax year (b) 2017 (c) 2016 (d)/2015 (e) Total (a) 2018 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 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 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.) 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)) 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 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:

Form 990-PF (2018)

| Part XV Supplementary Information | | | | |
|---|---|------------------------|------------------------|--------------|
| 3 Grants and Contributions Paid During | | 1 | | |
| Recipient | If recipient is an individual, show any relationship to | Foundation | Purpose of grant or | Amount |
| Name and address (home or business) | any foundation manager or substantial contributor | status of recipient | contribution | Amount |
| | | | | |
| PLANNED PARENTHOOD OF AMERICA | N/A | PC | GENERAL - UNRESTRICTED | |
| 26 BLEECKER STREET NEW YORK, NY 10012 | | | | 3,000 |
| TORK, NI 10012 | | | | |
| QUEENS BOTANICAL GARDEN | N/A | РC | GENERAL - UNRESTRICTED | |
| 43-50 MAIN STREET | | | | |
| FLUSHING, NY 11355 | | 1 | | 8,500 |
| QUEENS BOTANICAL GARDEN | N/A | PC | CAPITAL CAMPAIGN | |
| 43-50 MAIN STREET | ["," | | | |
| FLUSHING, NY 11355 | | | | 10,000 |
| | | | | |
| QUEENS COLLEGE FOUNDATION | N/A | ₽C | KCA INTERNSHIPS | |
| 65-30 KISSENA BLVD | | | | 10 000 |
| FLUSHING, NY 11367 | | | | 10,000 |
| QUEENS COLLEGE FOUNDATION | N/A | PC | KCA OPERATING SUPPORT | |
| 65-30 KISSENA BLVD | | | | |
| FLUSHING, NY 11367 | | | | 25,000 |
| | | | | |
| SHELTERING ARMS 305 SEVENTH AVE | N/A | ₽C | GENERAL - UNRESTRICTED | |
| NEW YORK, NY 10001 | | | | 7,500 |
| | | | | |
| SOUTHERN POVERTY LAW CENTER | N/A | PC | GENERAL - UNRESTRICTED | |
| 1989 COLLEGE AVE. NE ATLANTA, GA 30317 | | | | 3,000 |
| | | | | |
| WNET/CHANNEL 13 | N/A | ₽C | GENERAL - UNRESTRICTED | |
| 450 WEST 33RD STREET | | | | |
| NEW YORK, NY 10001 | | | | 1,500 |
| LOUIS ARMSTRONG HOUSE MUSEUM | N/A | PC | GENERAL - UNRESTRICTED | |
| 34-56 107TH STREET | | | | |
| CORONA, NY 11368 | | | | 10,000 |
| | | | | |
| | | | | |
| The later was also also also also also also also al | | | | 78,500 |
| Total from continuation sheets | | | | |

Form 990-PF (2018)

FOUNDATION

06-1636082 Page 11

| Grants and Contributions Paid During the Y | | 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 | or substantial contributor | Toolpion | | |
| | | | | |
| | | | | |
| CALVARY FUND INC OF CALVERY HOSPITAL | N/A | ₽C | GENERAL - UNRESTRICTED | |
| 1740 EASTCHESTER ROAD | [··· | | | |
| BRONX, NY 10461 | | | | 5,000 |
| | | | | |
| | | | | |
| QUEENS COLLEGE FOUNDATION | N/A | PC | CENTER FOR THE ARTS | |
| 55-30 KISSENA BLVD | | | | 175 000 |
| FLUSHING, NY 11367 | | | | 175,000 |
| | | | | |
| EOOMSMADGODG ODG | \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ | ₽C | GENERAL - UNRESTRICTED | |
| FOOTSTEPSORG.ORG 114 JOHN STREET, #930 | N/A | | GENERAL - UNRESTRICTED | |
| NEW YORK, NY 10272 | | | | 1,500 |
| | | | | |
| | | | | |
| HANDEL & HAYDN SOCIETY | N/A | PC | GENERAL - UNRESTRICTED | |
| 9 HARCOURT STREET | | | Ì | F 000 |
| BOSTON, MA 02116 | - | | | 5,000 |
| | | | | |
| PATIENT AIRLIFT SERVICES | Y (3 | ₽C | GENERAL - UNRESTRICTED | |
| 120 ADAMS BLVD | N/A | FC | GENERAL - UNRESTRICTED | |
| FARMINGDALE, NY 11735 | | <u> </u> | | 30,000 |
| | NTINUATION SHEE | T(S) | ▶ 3a | 295,000 |
| Approved for future payment | | | | |
| | | | | |
| NONE | , | | | |
| | | | | |
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| Total | | - | ▶ 3b | |

06-1636082 Page 12

| Part XVI-A | Analysis of | Income-Producing | Activities |
|------------|-------------|------------------|------------|
|------------|-------------|------------------|------------|

| Enter gross amounts unless otherwise indicated | Unrelate | ed business income | | ded by section 512, 513, or 514 | (e) |
|---|----------------------|-----------------------------|------------------------|---------------------------------------|---------------------------------------|
| • | (a) Business | (b) Amount | Exclu- sion code | (d) Amount | Related or exempt function income |
| 1 Program service revenue: | code | | COGE | , | |
| a | | | ⊢ — | | |
| b | ļ | | ļ | | |
| C | ļ | | ļ | | |
| d | | | <u> </u> | | |
| e | | | [| , | |
| f | | | | | |
| g Fees and contracts from government agencies | | | | | |
| 2 Membership dues and assessments | | | | | · · · · · · · · · · · · · · · · · · · |
| | | | | | |
| 3 Interest on savings and temporary cash | | | 14 | 11 110 | |
| investments | | | $\frac{14}{14}$ | | |
| 4 Dividends and interest from securities | | | 14 | 251,948. | |
| 5 Net rental income or (loss) from real estate: | 2.00 | | | | |
| a Debt-financed property | | | L | | |
| b Not debt-financed property | | | | | |
| 6 Net rental income or (loss) from personal | | | | | |
| property | 1 | | | | |
| 7 Other investment income | 1 | | | | |
| • | | | | | |
| 8 Gain or (loss) from sales of assets other | | | 18 | <54,950.> | |
| than inventory | | | 10 | <34,330.2 | |
| 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. | | 208,117. | 0. |
| 13 Total Add line 12, columns (b), (d), and (e) | P.2000 - 8.2000 - 4. | | 12000000000 | 13 | |
| | | | | " | 200,117. |
| (See worksheet in line 13 instructions to verify calculations.) | | | | | · |
| Part XVI-B Relationship of Activities to | the Acco | omplishment of Exc | empt | Purposes | |
| Line No. Explain below how each activity for which incor | no is reported | un column (a) of Part V\/LA | contri | outed importantly to the accom | anlichment of |
| | | | COHUI | outed importantly to the accom | ipiisiiiileiti ot |
| the foundation's exempt purposes (other than t | by providing id | ilus idi sucii purposes). | | | |
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|----------------|-------------------|------------------------------------|---|--------------------|---------------------------------------|------------------------|---------------------------------------|-------------------------------|------------|-------------|
| Form 990 | | | | oforo to o | nd Transactions and | d Dolotionohi | | | Pag | e 13 |
| Conta | 74113 | Exempt Organ | | 151612 (O al | iu iransactions an | u neiationsiii | he with Monch | ai itable | | |
| | | <u></u> | | | | | 504/) | 100006 | Voo | Nia |
| | | | | | g with any other organization | a described in section | on 501(c) | | Yes | No |
| | | | | | to political organizations? | | | | | |
| a Tra | nsfers 1 | from the reporting founda | ation to a noncharita | able exempt org | janization of: | | | | | |
| (1) | Cash | | | | | | | 1a(1) | <u></u> | <u>X</u> |
| (2) | Other | assets | | | | | | 1a(2) | 20.500 | X |
| b Oth | er trans | sactions. | | | | | | | | |
| (1) | Sales | of assets to a noncharital | ble exempt organiza | ition | | | | 1b(1) | | X |
| (2) | Purch | ases of assets from a noi | ncharitable exempt i | organization | | | | 1b(2) | | X |
| (3) | Renta | l of facilities, equipment, | or other assets | | | | | 1b(3) | | X |
| (4) | Reimb | oursement arrangements | | | | | | 1b(4) | | X |
| | | or loan guarantees | | | | | | 1b(5) | | X |
| | | mance of services or me | mbershin or fundra | ısını solicitatio | ns | | | 1b(6) | | X |
| • • | | facilities, equipment, ma | | | | | | 1c | | X |
| | • | | = : | | dule. Column (b) should alw | ave chow the fair n | narket value of the goo | | otc | |
| _ | | • | | - | ed less than fair market value | = | - | - | ets, | |
| | |) the value of the goods, | | | su 1655 thail fall market value | in any transaction | or snamly arrangemen | it, Silow III | | |
| | _, _,_ | (b) Amount involved | | | e exempt organization | (d) p | | | | |
| (a) Line ni | <u> </u> | <u>`</u> | · · · · · · · · · · · · · · · · · · · | | e exempt of gamzation | (u) Description | of transfers, transactions, | and snaring arra | ingements | |
| | - | | NOT APPLI | CABLE | | | | | | |
| | - | | | | | | | | | |
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| | | | | | | | | | | |
| | | | | | or more tax-exempt organiz | ations described | | | رجعا | ۱ |
| | | 501(c) (other than sectio | | ection 52/7 | | | | Yes | X | , No |
| <u>b lf "\</u> | Yes," co | mplete the following sch | | | (A) Toronto and a company (A) | | t 1 D | | | |
| | | (a) Name of org | janization | | (b) Type of organization | | (c) Description of relat | ionsnip | | |
| | | N/A | | | | | · | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | _ | | |
| - | | | | | | | | | | |
| | | | | | accompanying schedules and sta | | | May the IRS | iscuss th | is |
| Sign | and be | hef, it is true, correct, and corr | polete Decigration of pr | eparer (other than | taxpayer) is based of all information | on of which preparer h | as any knowledge | return with th shown below | e preparer | r |
| Here | | Xtreat 10 | user! | \nearrow | 15/14/19 | TRUSTE | EE | X Yes | | , No |
| | Sion | ature of officer or trustee | 7 | / | Date / | Title | | | · | |
| | 1 2.9. | Print/Type preparer's na | | Preparer's s | | Date | Check if P | TIN | | |
| | | , this type property 3 lie | | | | -2.0 | self- employed | | | |
| Paid | | CONNITE | D T C C C C C C C C C C C C C C C C C C | MAG | WING IN A | 05-09-19 | | D | 40E | |
| Prepa | arer | CONNIE J. | | TOP TO | w yind uu | 00-03-13 | | P01417 | | |
| Liebs | ai Ci | Firm's name ► LUM | א א מקחפ" א מק | CORMIC | K, ЦЦТР | | Firm's EIN ► 16 | -0/654 | 90 | |

Form 990-PF (2018)

Phone no. (716)856-3300

Use Only

Firm's address ▶ 369 FRANKLIN STREET

BUFFALO, NY 14202

| FORM 990 |)-PF G | AIN OR (LOS | S) FROM SALE | OF A | SSETS | | STA | ATEMENT 1 |
|----------|-----------------------------|-------------------------------|-----------------------------|------|--------------------------|-------------|------|------------------------------|
| DESCRIPT | (A) TION OF PROPERTY | <u> </u> | | | ANNER QUIRED | DA' ACQU | | DATE SOLI |
| PUBLICLY | TRADED SECURIT | PIES | | | _ | | | |
| | (B) GROSS SALES PRICE | (C) COST OR OTHER BASIS | (D) EXPENSE SALE | OF | (E) DEPRE | | CATN | (F) |
| - | 1,902,685. | 1,867,78 | | 0. | DEPRE | 0. | GAIN | 34,901 |
| DESCRIPT | (A) ION OF PROPERTY | · | | | ANNER QUIRED | DA ACQU | | DATE SOLI |
| PUBLICLY | TRADED SECURIT | PIES | | | | | | |
| | (B) GROSS SALES PRICE | (C) VALUE AT TIME OF AC | (D) EXPENSE Q. SALE | | (E) DEPRE | | GAIN | (F) IOR LOSS |
| | 193,634. | 299,9 | 05. | 0. | | 0. | | <106,271. |
| | GAINS DIVIDENDS | | | | | | | 16,420 <54,950. |
| FORM 990 |)-PF INTEREST C | ON SAVINGS A | ND TEMPORARY | CASH | INVEST | MENTS | STA | ATEMENT 2 |
| SOURCE | | | (A) REVENUE PER BOOKS | | (B) INVEST _INCOME | | | (C) ADJUSTED ET INCOME |
| | ACCOUNT INTERE | EST | 1. | | 11 | 1. | | |
| | ARKET INTEREST | | 11,118. | | 11, | 110. | | |

| FORM 990-PF | DIVIDENDS | AND INTERE | EST FROM SECUR | ITIES ST | PATEMENT 3 |
|---|-----------------|---|---|---|---|
| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
| ACCRUED INTEREST PAID BROOKFIELD INFRASTRUCTURE | <12,572. | > (| 0. <12,572.: | > <12,572.> | |
| PARTNERS, LP SUBPART F INCOME DIVIDENDS FROM | 5. | | 0. 5. | 5. | |
| SECURITIES INTEREST FROM | 164,079. | 16,420 | 0. 147,659. | 147,659. | |
| SECURITIES OTHER INVESTMENT | 97,545. | (| 0. 97,545. | 97,545. | |
| INCOME THE BLACKSTONE GROUP L.P | 18,899. | (| 18,899. | 18,899. | |
| SUBPART F & 951A INCOME U.S. TREASURY | 59. | (| 0. 59. | 59. | |
| INTEREST | 353. | (| 0. 353. | 353. | |
| | | | | | |
| TO PART I, LINE 4 = | 268,368. | 16,420 | 251,948. | 251,948. | |
| - | 268,368. | ACCOUNTII | | | FATEMENT 4 |
| TO PART I, LINE 4 = FORM 990-PF DESCRIPTION | 268,368. | | | | (D) |
| FORM 990-PF | 268,368. | ACCOUNTII (A) EXPENSES | NG FEES (B) NET INVEST- | (C) ADJUSTED | (D) CHARITABLE |
| FORM 990-PF DESCRIPTION | | ACCOUNTII (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED | (D) CHARITABLE PURPOSES |
| FORM 990-PF DESCRIPTION ACCOUNTING FEES | | ACCOUNTING (A) EXPENSES PER BOOKS 10,950. | (B) NET INVEST- MENT INCOME 8,213. | (C) ADJUSTED | (D) CHARITABLE PURPOSES |
| FORM 990-PF DESCRIPTION ACCOUNTING FEES | ., LN 16B | ACCOUNTING (A) EXPENSES PER BOOKS 10,950. | (B) NET INVEST- MENT INCOME 8,213. | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| FORM 990-PF DESCRIPTION ACCOUNTING FEES TO FORM 990-PF, PG 1 | ., LN 16B | ACCOUNTING (A) EXPENSES PER BOOKS 10,950. | (B) NET INVEST- MENT INCOME 8,213. 8,213. | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES 2,737. 2,737. TATEMENT 5 (D) |
| FORM 990-PF DESCRIPTION ACCOUNTING FEES TO FORM 990-PF, PG 1 | ., LN 16B | ACCOUNTING (A) EXPENSES PER BOOKS 10,950. 10,950. CHER PROFES (A) EXPENSES | (B) NET INVEST- MENT INCOME 8,213. 8,213. SIONAL FEES (B) NET INVEST- | (C) ADJUSTED NET INCOME ST (C) ADJUSTED | (D) CHARITABLE PURPOSES 2,737. 2,737. TATEMENT 5 (D) CHARITABLE |

| FORM 990-PF | TAX | ES | STATEMENT 6 | | |
|----------------------------------|----------------------------------|--|-------------------------------|---------------------------------------|--|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | |
| FOREIGN TAXES FEDERAL EXCISE TAX | 1,834. 20,273. | 1,834. | | 0. | |
| TO FORM 990-PF, PG 1, LN 18 | 22,107. | 1,834. | | 0. | |
| | | | | | |
| FORM 990-PF | OTHER E | XPENSES | S | TATEMENT 7 | |
| FORM 990-PF DESCRIPTION | OTHER E (A) EXPENSES PER BOOKS | . XPENSES (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | TATEMENT 7 (D) CHARITABLE PURPOSES | |
| | (A) EXPENSES | (B) NET INVEST- MENT INCOME 0. 0. | (C) ADJUSTED | (D) CHARITABLE | |

| FORM 990-PF | CORPORATE STOCK | | STATEMENT 8 |
|------------------------------------|---------------------|------------|----------------------|
| DESCRIPTION | | BOOK VALUE | FAIR MARKET VALUE |
| FIDELITY #7853 EQUITIES - SEE | | 433,280. | 208,805. |
| NEUBERGER BERMAN #2574 EQUITI A | | 487,864. | 402,268. |
| NEUBERGER BERMAN #2598 EQUITI B | | 502,368. | 507,758. |
| NEUBERGER BERMAN #2614 EQUITI C | | 1,022,959. | 1,042,735. |
| NEUBERGER BERMAN #2618 EQUITI D | | 438,017. | 417,546. |
| NEUBERGER BERMAN #2612 EQUITI G | ES - SEE ATTACHMENT | 351,976. | 408,043. |
| NEUBERGER BERMAN #2613 EQUITI I | ES - SEE ATTACHMENT | 1,087,699. | 1,009,195. |
| TOTAL TO FORM 990-PF, PART II | LINE 10B | 4,324,163. | 3,996,350 |

| FORM 990-PF CORPORATE BONDS | | STATEMENT 9 |
|--|------------|----------------------|
| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
| NEUBERGER BERMAN #2598 US FIXED INCOME - SEE ATTACHMENT B | 480,977. | 467,894. |
| NEUBERGER BERMAN #4304 US FIXED INCOME - SEE ATTACHMENT E NEUBERGER BERMAN #4302 US FIXED INCOME - SEE | 430,409. | 396,175. |
| ATTACHMENT F NEUBERGER BERMAN #2617 US FIXED INCOME - SEE | 1,009,387. | 946,419. |
| ATTACHMENT H | 1,319,800. | 1,273,961. |
| TOTAL TO FORM 990-PF, PART II, LINE 10C | 3,240,573. | 3,084,449. |

| FORM 990-PF O | THER INVESTMENTS | | STATEMENT 10 |
|---|---------------------|------------|----------------------|
| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
| FIDELITY #7853 MUTUAL FUNDS - SEL | E COST | 30,027. | 28,114. |
| NEUBERGER BERMAN #2598 ALTERNATIVINVESTMENTS - SEE ATTACHMENT B | | 25,999. | 23,652. |
| NEUBERGER BERMAN #2614 ALTERNATIVINVESTMENTS - SEE ATTACHMENT C | | 22,781. | 22,801. |
| NEUBERGER BERMAN #4304 PREFERED STOCK - SEE ATTACHMENT E | COST | 80,503. | 75,846. |
| TOTAL TO FORM 990-PF, PART II, L | INE 13 | 159,310. | 150,413. |