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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2018

Open to Public Inspection

For calendar year 2018, or tax year beginning 01-01-2018, and ending 12-31-2018

Name of foundation
HADDAD BRANDS FAMILY FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)
131 DOCKS CORNER RD

City or town, state or province, country, and ZIP or foreign postal code
DAYTON, NJ 08810

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

H Check type of organization

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

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

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 4,007,234

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify) _____
(Part I, column (d) must be on cash basis)

A Employer identification number
13-6126372

B Telephone number (see instructions)
(201) 356-2000

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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

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

Part I

Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)	
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	6,000,000			
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	305	305		
	4 Dividends and interest from securities . . .	25,544	25,544		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	10,000			
	b Gross sales price for all assets on line 6a _____ 3,710,000				
	7 Capital gain net income (from Part IV, line 2) . . .		10,000		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	113,028	113,028	0		
12 Total. Add lines 1 through 11	6,148,877	148,877	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0	0	0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	1,040	0	0	1,040
	c Other professional fees (attach schedule)	1,000	0	0	1,000
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .				
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	2,040	0	0	2,040
	25 Contributions, gifts, grants paid	873,686			873,686
	26 Total expenses and disbursements. Add lines 24 and 25	875,726	0	0	875,726
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	5,273,151			
	b Net investment income (if negative, enter -0-)		148,877		
c Adjusted net income (if negative, enter -0-) . . .			0		

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2018)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing	5,227	129,502	129,502
	2	Savings and temporary cash investments		148,876	148,876
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	0	5,000,000	3,728,856
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	5,227	5,278,378	4,007,234	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	5,227	5,278,378	
30	Total net assets or fund balances (see instructions)	5,227	5,278,378		
31	Total liabilities and net assets/fund balances (see instructions) .	5,227	5,278,378		

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	5,227
2	Enter amount from Part I, line 27a	2	5,273,151
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	5,278,378
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	5,278,378

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a See Additional Data Table			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	10,000
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 { }	3	10,000

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017	0	5,149	0 000000
2016	0	5,227	0 000000
2015	0	5,227	0 000000
2014			
2013			

2 Total of line 1, column (d) { }	2	0 000000
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years { }	3	0 000000
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5 { }	4	6,282,740
5 Multiply line 4 by line 3 { }	5	0
6 Enter 1% of net investment income (1% of Part I, line 27b) { }	6	1,489
7 Add lines 5 and 6 { }	7	1,489
8 Enter qualifying distributions from Part XII, line 4 { }	8	875,726

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	1,489
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	1,489
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,489
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	0
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	0
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	61
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	1,550
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	No
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NY _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ THE HADDAD ORGANIZATION LTD Telephone no ▶ (201) 356-2000			
	Located at ▶ 131 DOCKS CORNER RD DAYTON NJ ZIP+4 ▶ 08810			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶	16	Yes	No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	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 ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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, Form 4720, to determine if the foundation had excess business holdings in 2018).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		No

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.		5b
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	☐ Yes ☐ No	
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? If "Yes" to 6b, file Form 8870		6b No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	☐ Yes ☒ No	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(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
CHARLES A HADDAD C/O HADDAD 131 DOCKS CORNER ROAD DAYTON, NJ 08810	MEMBER 0 00	0	0	0
EDWARD HADDAD C/O HADDAD 131 DOCKS CORNER ROAD DAYTON, NJ 08810	MEMBER 0 00	0	0	0
RICHARD HADDAD C/O HADDAD 131 DOCKS CORNER ROAD DAYTON, NJ 08810	MEMBER 0 00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

3 **Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A **Summary of Direct Charitable Activities**

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

	Expenses
1	
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	3,251,173
b	Average of monthly cash balances.	1b	2,669,268
c	Fair market value of all other assets (see instructions).	1c	457,975
d	Total (add lines 1a, b, and c).	1d	6,378,416
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	6,378,416
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	95,676
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	6,282,740
6	Minimum investment return. Enter 5% of line 5.	6	314,137

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	314,137
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	1,489
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,489
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	312,648
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	312,648
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	312,648

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	875,726
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	875,726
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	1,489
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	874,237

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 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				312,648
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			257	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013.				
b From 2014.				
c From 2015.				
d From 2016.				
e From 2017.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 875,726				
a Applied to 2017, but not more than line 2a			257	
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 2018 distributable amount.				312,648
e Remaining amount distributed out of corpus	562,821			
5 Excess distributions carryover applied to 2018 (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	562,821			
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 2017 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				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 2013 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	562,821			
10 Analysis of line 9				
a Excess from 2014.				
b Excess from 2015.				
c Excess from 2016.				
d Excess from 2017.				
e Excess from 2018.	562,821			

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

1a 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 organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
2a 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))

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

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

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

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

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

c Any submission deadlines

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

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

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

Enter gross amounts unless otherwise indicated

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
Enter gross amounts unless otherwise indicated				
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		30	305	
4 Dividends and interest from securities. . . .		30	25,544	
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.		30	113,028	
8 Gain or (loss) from sales of assets other than inventory		30	10,000	
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		148,877	0
13 Total. Add line 12, columns (b), (d), and (e).		13		148,877

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

[illegible]

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

	Yes	No
--	-----	----

--	--	--

1a(1)	No
1a(2)	No

--	--	--

1b(1)	No
--------------	-----------

1b(2)	No
--------------	-----------

1b(3)		No
--------------	--	-----------

1b(4)		No
--------------	--	-----------

1b(5)		No
--------------	--	-----------

1b(6)		No
--------------	--	-----------

1c		No
----	--	----

value
ue

[illegible]

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

**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.

2019-11-13

* * * * *

May the IRS discuss this
return
with the preparer shown
below

(see instr)? ☒ Yes ☐ No

Signature of officer or trustee

Date _____

Title

**Paid
Preparer
Use Only**

Print/Type preparer's name PHILLIP A BOTTARI	Preparer's Signature	Date 2019-11-12	Check if self-employed ☐	PTIN P00541720
Firm's name ▶ FRIEDMAN LLP				Firm's EIN ▶ 13-1610809
Firm's address ▶ ONE LIBERTY PLAZA 165 BROADWAY 21ST FL NEW YORK, NY 10006				Phone no (212) 842-7000

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

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 CS REVIEW NOTE SPX	P	2018-05-25	2018-09-11
1 JPM PRIME MM FD	P	2018-06-01	2018-06-01
JPM PRIME MM FD	P	2018-06-11	2018-06-12
JPM PRIME MM FD	P	2018-06-20	2018-06-20
JPM PRIME MM FD	P	2018-04-30	2018-04-30
JPM PRIME MM FD	P	2018-08-31	2018-08-31
JPM PRIME MM FD	P	2018-09-26	2018-09-26
JPM PRIME MM FD	P	2018-11-30	2018-11-30

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
510,000		500,000	10,000
500,000		500,000	0
300,000		300,000	0
1,000,000		1,000,000	0
200,000		200,000	0
1,000,000		1,000,000	0
100,000		100,000	0
100,000		100,000	0

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

[illegible]

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEPHARDIC BIKUR HOLIM 200 NORWEED AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	8,000
SEPHARDIC FOOD FUND8 W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	10,000
CONGREGATION BETH TORAH 1061 OCEAN PKWY BROOKLYN, NY 11230		PC	BENEFIT OF THE COMMUNITY	11,994
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
QHEL YAACOB CONGREGATION 4 OCEAN AVE DEAL, NJ 07723		PC	BENEFIT OF THE COMMUNITY	7,800
YESHIVAT KETER TORAH 1 MEDRIDIAN RD EATONTOWN, NJ 07724		PC	BENEFIT OF THE COMMUNITY	501
SEPHARDIC PRESS 2201 NE 65TH STREET SEATTLE, WA 98115		PC	BENEFIT OF THE COMMUNITY	2,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
YAD YOSEF1036 OCEAN PKWY BROOKLYN, NY 11230		PC	BENEFIT OF THE COMMUNITY	1,800
SEPHARDIC COMMUNITY CENTER 1901 OCEAN PKWY BROOKLYN, NY 11223		PC	BENEFIT OF THE COMMUNITY	10,000
SEPHARDIC FOOD FUNDS 8 W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	10,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MITZVAH MAN FOUNDATION PO BOX 290690 BROOKLYN, NY 11229		PC	BENEFIT OF THE COMMUNITY	2,600
FRIENDS OF UNITED HATZALAH 208 E 51ST ST SUITE 303 NEW YORK, NY 10022		PC	BENEFIT OF THE COMMUNITY	1,800
THE MIDRASH OF WEST LONG BRANCH 479 MONMOUTH RD WEST LONG BRANCH, NJ 07764		PC	BENEFIT OF THE COMMUNITY	1,800
Total ► 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
RONALD MCDONALD HOUSE NEW YORK 405 E 73RD ST NEW YORK, NY 10026		PC	BENEFIT OF THE COMMUNITY	11,500
ST MARY'S FOOD PANTRY 747 WEST BAY AVE BARNEGAT, NJ 08005		PC	BENEFIT OF THE COMMUNITY	100
YESHIVAH OF FALTBUSH1609 AVE J BROOKLYN, NJ 11230		PC	BENEFIT OF THE COMMUNITY	20,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BRIDGE ACADEMY570 OLIVE ST 578 COATESVILLE, PA 19320		PC	BENEFIT OF THE COMMUNITY	3,000
SEPHARDIC BIKUR HOLIM 200 NORWEED AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	4,000
SEPHARDIC FOOD FUNDS 8 W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	10,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
OHEL SIMHA SUPPER FUND 4 OCEAN AVE DEAL, NJ 07723		PC	BENEFIT OF THE COMMUNITY	1,000
CHABAD OF GRAMERCY PARK 121 W 19TH ST NEW YORK, NY 10011		PC	BENEFIT OF THE COMMUNITY	1,800
LEV ECHAD INC460 BAYVIEW AVE INWOOD, NY 110961702		PC	BENEFIT OF THE COMMUNITY	3,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AHI EZER YESHIVA2433 OCEAN PKWY BROOKLYN, NY 11235		PC	BENEFIT OF THE COMMUNITY	1,800
SEPHARDIC FOOD FUND8 W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	10,000
SEPHARDIC BIKUR HOLIM 200 NORWEED AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	4,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MAGEN DAVID YESHIVAH 2130 MCDONALD AVENUE BROOKLYN, NY 11223		PC	BENEFIT OF THE COMMUNITY	100,000
CONGREGATION BETH TORAH 1061 OCEAN PKWY BROOKLYN, NY 11230		PC	BENEFIT OF THE COMMUNITY	1,001
MESILA INTERNATIONAL INC 1215 40TH ST BROOKLYN, NY 11218		PC	BENEFIT OF THE COMMUNITY	1,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HATZALAH167 MONMOUTH ROAD STE 4 OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	4,000
RENEWAL5904 13TH AVE BROOKLYN, NY 11002		PC	BENEFIT OF THE COMMUNITY	1,800
BARKAI FOUNDATION5302 21ST AVE BROOKLYN, NY 11204		PC	BENEFIT OF THE COMMUNITY	5,200
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SERENDIPITY CENTER INC PO BOX 33350 PORTLAND, OR 97292		PC	BENEFIT OF THE COMMUNITY	10,000
TEACH NYS - OTHODOX UNION ADVOCACY CENTER 11 BROADWAY NEW YORK, NY 10004		PP	BENEFIT OF THE COMMUNITY	10,000
SEPHARDIC BIKUR HOLIM 200 NORWEED AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	4,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEPHARDIC FOOD FUNDS 8 W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	10,000
MAGEN DAVID YESHIVAH 2130 MCDONALD AVENUE BROOKLYN, NY 11223		PC	BENEFIT OF THE COMMUNITY	20,000
CONGREGATION BETH TORAH 1061 OCEAN PKWY BROOKLYN, NY 11230		PC	BENEFIT OF THE COMMUNITY	40,000
Total  3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CONGREGATION BETH TORAH 1061 OCEAN PKWY BROOKLYN, NY 11230		PC	BENEFIT OF THE COMMUNITY	1,000
MAGEN DAVID YESHIVAH 2130 MCDONALD AVENUE BROOKLYN, NY 11223		PC	BENEFIT OF THE COMMUNITY	18,000
YAD YOSEF1036 OCEAN PKWY BROOKLYN, NY 11230		PC	BENEFIT OF THE COMMUNITY	1,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEPHARDIC BOKUR HOLIM 200 NORWEED AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	4,000
SEPHARDIC FOOD FUND8 W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	10,000
UNIVERSITY OF PENNSYLVANIA 3451 WALNUT STREET SUITE 305 PHILADELPHIA, PA 19104		PC	BENEFIT OF THE COMMUNITY	20,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEPHARDIC COMMUNITY CENTER 1901 OCEAN PKWY BROOKLYN, NY 11223		PC	BENEFIT OF THE COMMUNITY	100,000
DEAL PBA190 NORWOOD AVENUE DEAL, NJ 07723		PC	BENEFIT OF THE COMMUNITY	500
NEW YORK CANCER CENTER 160 E 34TH ST NEW YORK, NY 10016		PC	BENEFIT OF THE COMMUNITY	10,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEPHARDIC FOOD FUND8 W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	12,000
SEPHARDIC BIKUR HOLIM 200 NORWEED AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	4,000
DSN COMM CENTER 244 NORWOOD AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	3,600
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CARE FOUNDATION FOR SPECIAL CHILDREN 4609 W PONKAN RD APOPKA, FL 32712		PC	BENEFIT OF THE COMMUNITY	5,000
THE SPECIAL CHILDREN'S CENTER 1400 PROSPECT ST LAKEWOOD, NJ 08701		PC	BENEFIT OF THE COMMUNITY	5,000
SEPHARDIC COMMUNITY CENTER 1901 OCEAN PKWY BROOKLYN, NY 11223		PC	BENEFIT OF THE COMMUNITY	7,840
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SBH COMMUNITY SERVICE NETWORK 200 NORWOOD AVE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	1,000
MOUNT SINAI25-10 30TH AVE LONG ISLAND CITY, NY 11102		PC	BENEFIT OF THE COMMUNITY	20,000
SEPHARDIC FOOD FUNDS W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	12,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEPHARDIC BIKUR HOLIM 200 NORWEED AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	4,000
THE KESHER ORG 1000 POTTSTOWN PIKE WEST CHESTER, PA 19380		PC	BENEFIT OF THE COMMUNITY	2,600
NEW YORK UNIVERSITY 70 WASHINGTON SQ S NEW YORK, NY 10012		PC	BENEFIT OF THE COMMUNITY	20,000
Total ► 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PROPEL NETWORK1125 MISSION ST SAN FRANCISCO, CA 94104		PC	BENEFIT OF THE COMMUNITY	3,100
DEAL FIRE COMPANY 110 BRIGHTON AVE DEAL, NJ 07723		PC	BENEFIT OF THE COMMUNITY	200
HILLEL YESHIVA1025 DEAL RD OCEAN, NJ 07712		PC	BENEFIT OF THE COMMUNITY	10,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SHUVI NAFSHI FOUNDATION 447 AVENUE P BROOKLYN, NY 112231914		PC	BENEFIT OF THE COMMUNITY	26,000
SEPHARDIC RABBINICAL COLLEGE 730 AVENUE S BROOKLYN, NY 11223		PC	BENEFIT OF THE COMMUNITY	3,000
ISRAEL CANCER RESEARCH FUND INC 52 VANDERBILT AVENUE SUITE 1510 NEW YORK, NY 10017		PC	BENEFIT OF THE COMMUNITY	5,000
Total ► 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEPHARDIC FOOD FUND8 W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	12,000
SEPHARDIC BIKUR HOLIM 200 NORWEED AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	4,000
AHZHEIMER'S ASSOCIATION 225 N MICHIGAN AVE CHICAGO, IL 60601		PC	BENEFIT OF THE COMMUNITY	500
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MONMOUTH MEDICAL CENTER 300 2ND AVENUE LONG BRANCH, NJ 07740		PC	BENEFIT OF THE COMMUNITY	20,000
CONGREGATION BETH TORAH 1061 OCEAN PKWY BROOKLYN, NY 11230		PC	BENEFIT OF THE COMMUNITY	1,800
OHEL SIMHA SUPPER FUND 4 OCEAN AVE DEAL, NJ 07723		PC	BENEFIT OF THE COMMUNITY	14,000
Total ► 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
EXCEED NETWORK404 5TH AVE NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	10,000
AMERICAN DIABETES ASSOCIATION PO BOX 15829 ARLINGTON, VA 22215		PC	BENEFIT OF THE COMMUNITY	1,000
GESHER YEHUDA49 AVENUE T BROOKLYN, NY 11223		PC	BENEFIT OF THE COMMUNITY	2,500
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
RENEWAL5904 13TH AVE BROOKLYN, NY 11002		PC	BENEFIT OF THE COMMUNITY	3,600
SEPHARDIC BIKUR HOLIM 200 NORWEED AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	4,000
SEPHARDIC FOOD FUNDS 8 W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	12,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LONG BEACH FIRE DEPARTMENT 1 WEST CHESTER ST LONG BEACH, NY 11561		PC	BENEFIT OF THE COMMUNITY	1,000
ILAN HIGH SCHOOL1200 ROSELD AVE OCEAN TOWNSHIP, NJ 07712		GOV	BENEFIT OF THE COMMUNITY	10,000
BARKAI FOUNDATION5302 21ST AVE BROOKLYN, NY 11204		PC	BENEFIT OF THE COMMUNITY	5,200
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
EZER MIZION 5225 NEW UTRECHT AVE 3 BROOKLYN, NY 11219		PC	BENEFIT OF THE COMMUNITY	2,000
SEPHARDIC FOOD FUND8 W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	12,000
SEPHARDIC BIKUR HOLIM 200 NORWEED AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	4,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CONGREGATION BETH TORAH 1061 OCEAN PKWY BROOKLYN, NY 11230		PC	BENEFIT OF THE COMMUNITY	40,000
CONGREGATION BETH TORAH 1061 OCEAN PKWY BROOKLYN, NY 11230		PC	BENEFIT OF THE COMMUNITY	1,000
YMA FASHION SCHOLARSHIP FUND 1501 BROADWAY SUITE 2001 NEW YORK, NY 10036		PC	BENEFIT OF THE COMMUNITY	17,750
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEPHARDIC BIKUR HOLIM8 W 40TH ST NEW YORK, NY 10018		PC	BENEFIT OF THE COMMUNITY	4,000
SEPHARDIC FOOD FUND 200 NORWEED AVENUE OAKHURST, NJ 07755		PC	BENEFIT OF THE COMMUNITY	12,000
NEW YORK UNIVERSITY 70 WASHINGTON SQ S NEW YORK, NY 10012		PC	BENEFIT OF THE COMMUNITY	20,000
Total ▶ 3a				873,686

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEPHARDIC COMMUNITY ALLIANCE 1061 OCEAN PKWY BROOKLYN, NY 11230		PC	BENEFIT OF THE COMMUNITY	5,000
Total  3a				873,686

TY 2018 Accounting Fees Schedule**Name:** HADDAD BRANDS FAMILY FOUNDATION**EIN:** 13-6126372

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION	1,040	0	0	1,040

TY 2018 Investments Corporate Stock Schedule**Name:** HADDAD BRANDS FAMILY FOUNDATION**EIN:** 13-6126372**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
495,281 SH BNP PHOENIX BAC	500,000	429,679
11.5% AUTO CALL ON BABA	1,000,000	727,000
10.25% AUTO CALL ON LULU	500,000	455,250
8.3% AUTO CALL ON AAPL	500,000	343,750
8.5% AUTO CALL ON JPM	500,000	419,500
10.5% AUTO CALL ON NVDA	500,000	368,750
8.25% AUTO CALL ON C	500,000	416,000
13.75% AUTO CALL ON NFLX	1,000,000	568,927

TY 2018 Other Income Schedule

Name: HADDAD BRANDS FAMILY FOUNDATION

EIN: 13-6126372

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME	113,028	113,028	0

TY 2018 Other Professional Fees Schedule**Name:** HADDAD BRANDS FAMILY FOUNDATION**EIN:** 13-6126372

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MISC EXPENSES	1,000	0	0	1,000

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Go to <u>www.irs.gov/Form990</u> for the latest information	OMB No 1545-0047 2018
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Name of the organization HADDAD BRANDS FAMILY FOUNDATION	Employer identification number 13-6126372
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . ▶ \$ _____

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

Name of organization HADDAD BRANDS FAMILY FOUNDATION	Employer identification number 13-6126372
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Part I **Contributors** (See instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	THE HADDAD ORGANIZATION LTD 131 DOCKS CORNER DAYTON, NJ 08810	\$ 6,000,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Employer identification number

13-6126372

Part II	Noncash Property
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Schedule B (Form 990, 990-EZ, or 990-PF) (2018)

Name of organization HADDAD BRANDS FAMILY FOUNDATION	Employer identification number 13-6126372
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	