

Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

2018

Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

For calendar year **2018** or tax year beginning _____, and ending _____

Name of foundation WILLIAM E. SIMON FOUNDATION INC.		A Employer identification number 13-6217788
Number and street (or P O box number if mail is not delivered to street address) 140 EAST 45TH STREET	Room/suite 14D	B Telephone number 212-661-8366
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10017		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 44,503,779.	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))</small>	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received			N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	59,971.	59,971.		
4 Dividends and interest from securities	790,486.	685,991.		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	4,525,721.			
b Gross sales price for all assets on line 6a 8,362,887.				
7 Capital gain net income (from Part IV, line 2)		4,643,225.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income	91,163.	91,163.		
12 Total. Add lines 1 through 11	5,467,341.	5,480,350.		
13 Compensation of officers, directors, trustees, etc	242,000.	0.		242,000.
14 Other employee salaries and wages	523,832.	0.		523,832.
15 Pension plans, employee benefits	207,535.	0.		208,777.
16a Legal fees Stmt 2	4,680.	4,680.		0.
b Accounting fees Stmt 3	16,500.	8,250.		0.
c Other professional fees Stmt 4	766,976.	337,892.		304,084.
17 Interest	66,386.	66,386.		0.
18 Taxes Stmt 5	-33,096.	32,108.		1,500.
19 Depreciation and depletion				
20 Occupancy	280,762.	0.		281,072.
21 Travel, conferences, and meetings	42,415.	0.		46,869.
22 Printing and publications	1,100.	0.		1,100.
23 Other expenses Stmt 6	420,728.	337,932.		81,577.
24 Total operating and administrative expenses. Add lines 13 through 23	2,539,818.	787,248.		1,690,811.
25 Contributions, gifts, grants paid	6,546,682.			6,837,275.
26 Total expenses and disbursements. Add lines 24 and 25	9,086,500.	787,248.		8,528,086.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-3,619,159.			
b Net investment income (if negative, enter -0-)		4,693,102.		
c Adjusted net income (if negative, enter -0-)			N/A	

SCANNED DEC 05 2019 Operating and Administrative Expenses 2019

RECEIVED
NOV 05 2019
OGDEN, UT
STATEMENT 1

669

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		4,296,081.	2,554,600.	2,554,600.
	3	Accounts receivable ▶ 2,025.				
		Less: allowance for doubtful accounts ▶		496.	2,025.	2,025.
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		8,998.	19,008.	19,008.
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock Stmt 7		13,935,507.	12,746,916.	12,746,916.
	c	Investments - corporate bonds				
	Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other Stmt 8		38,279,901.	29,101,414.	29,101,414.
14		Land, buildings, and equipment basis ▶				
		Less accumulated depreciation ▶				
15		Other assets (describe ▶ Statement 9)		124,867.	79,816.	79,816.
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		56,645,850.	44,503,779.	44,503,779.
17		Accounts payable and accrued expenses		27,500.	146,837.	
18		Grants payable		2,486,936.	2,196,343.	
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶ Statement 10)		236,993.	8,039.	
	23	Total liabilities (add lines 17 through 22)		2,751,429.	2,351,219.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	and complete lines 24 through 26, and lines 30 and 31.					
	24	Unrestricted		53,894,421.	42,152,560.	
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>					
	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		53,894,421.	42,152,560.		
31	Total liabilities and net assets/fund balances		56,645,850.	44,503,779.		

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	53,894,421.
2	Enter amount from Part I, line 27a	2	-3,619,159.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	50,275,262.
5	Decreases not included in line 2 (itemize) ▶ CHANGE IN UNREALIZED APPRECIATION	5	8,122,702.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	42,152,560.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES	P	Various	Various
b PARTNERSHIPS & OTHER INVESTMENTS	P	Various	Various
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 5,786,083.		3,416,401.	2,369,682.
b 2,576,804.		303,261.	2,273,543.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			2,369,682.
b			2,273,543.
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	4,643,225.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

Yes No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	10,583,231.	56,921,566.	.185927
2016	11,587,779.	60,523,324.	.191460
2015	13,081,025.	69,308,976.	.188735
2014	13,614,066.	70,759,513.	.192399
2013	13,234,055.	67,679,976.	.195539

2 Total of line 1, column (d)	2	.954060
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	.190812
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	52,788,404.
5 Multiply line 4 by line 3	5	10,072,661.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	46,931.
7 Add lines 5 and 6	7	10,119,592.
8 Enter qualifying distributions from Part XII, line 4	8	8,528,086.

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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	93,862.
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	93,862.
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	93,862.
6	Credits/Payments:		
6a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	111,530.
6b	Exempt foreign organizations - tax withheld at source	6b	0.
6c	Tax paid with application for extension of time to file (Form 8868)	6c	20,000.
6d	Backup withholding erroneously withheld	6d	0.
7	Total credits and payments. Add lines 6a through 6d	7	131,530.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	37,668.
11	Enter the amount of line 10 to be: Credited to 2019 estimated tax <input type="checkbox"/> 37,668. Refunded <input type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a	X	
4b	X	
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		X

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions See Statement 11	X	
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>www.wesimonfoundation.org</u>	X	
14 The books are in care of ► <u>MASSEY QUICK SIMON & CO., LLC</u> Telephone no. ► <u>973-898-0290</u> Located at ► <u>310 SOUTH STREET, MORRISTOWN, NJ</u> ZIP+4 ► <u>07962-1913</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A		
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 ►		X

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

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

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

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

		Yes	No
5a During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 Organizations relying on a current notice regarding disaster assistance, check here	N/A <input checked="" type="checkbox"/>	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).	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	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(s) during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

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

1 List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 14-1				

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 14-2				

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

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	49,992,160.
b	Average of monthly cash balances	1b	3,499,279.
c	Fair market value of all other assets	1c	100,849.
d	Total (add lines 1a, b, and c)	1d	53,592,288.
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	53,592,288.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	803,884.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	52,788,404.
6	Minimum investment return. Enter 5% of line 5	6	2,639,420.

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	2,639,420.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	93,862.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	93,862.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,545,558.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,545,558.
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	2,545,558.

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	8,528,086.
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	8,528,086.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	8,528,086.

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				2,545,558.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013	9,923,782.			
b From 2014	10,195,014.			
c From 2015	9,733,824.			
d From 2016	8,628,569.			
e From 2017	7,833,603.			
f Total of lines 3a through e	46,314,792.			
4 Qualifying distributions for 2018 from Part XII, line 4: ▶ \$ 8,528,086.				
a Applied to 2017, but not more than line 2a			0.	
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				2,545,558.
e Remaining amount distributed out of corpus	5,982,528.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (e))				0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	52,297,320.			
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 instr.			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	9,923,782.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	42,373,538.			
10 Analysis of line 9:				
a Excess from 2014	10,195,014.			
b Excess from 2015	9,733,824.			
c Excess from 2016	8,628,569.			
d Excess from 2017	7,833,603.			
e Excess from 2018	5,982,528.			

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

4942(j)(3) or 4942(j)(5)

b Check box to indicate whether the foundation is a private operating foundation described in section

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities.

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

None

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

None

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

Check here 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

Other Income

Statement 1

Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
MISCELLANEOUS INCOME	91,163.	91,163.	
Total to Form 990-PF, Part I, line 11	91,163.	91,163.	

Form 990-PF

Legal Fees

Statement 2

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
JONES & DRAKE PLLC	4,680.	4,680.		0.
To Fm 990-PF, Pg 1, ln 16a	4,680.	4,680.		0.

Form 990-PF

Accounting Fees

Statement 3

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
OWEN J. FLANAGAN & COMPANY	16,500.	8,250.		0.
To Form 990-PF, Pg 1, ln 16b	16,500.	8,250.		0.

Form 990-PF	Other Professional Fees			Statement 4
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
ACCOUNTING & INVESTMENT ADVISORY FEES	159,000.	159,000.		0.
STAFF & OVERHEAD FEES	391,000.	0.		266,000.
CONSULTANT FEES	38,084.	0.		38,084.
CUSTODY/MGMT FEES - GOLDMAN SACHS - DELAWARE	20,779.	20,779.		0.
CUSTODY/MGMT FEES - GOLDMAN SACHS - EAGLE	70,414.	70,414.		0.
CUSTODY/MGMT FEES - GOLDMAN SACHS - HARRIS ASSOC.	69,453.	69,453.		0.
CUSTODY/MGMT FEES - US TRUST COMPANY	18,246.	18,246.		0.
To Form 990-PF, Pg 1, ln 16c	766,976.	337,892.		304,084.

Form 990-PF

Taxes

Statement 5

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
FEDERAL EXCISE TAXES	95,500.	0.		0.
RECOVERY OF DEFERRED				
FEDERAL EXCISE TAXES	-162,454.	0.		0.
NEW YORK FILING FEE	1,500.	0.		1,500.
FOREIGN TAXES	32,108.	32,108.		0.
UNRELATED BUSINESS INCOME				
TAXES	250.	0.		0.
To Form 990-PF, Pg 1, ln 18	-33,096.	32,108.		1,500.

Form 990-PF

Other Expenses

Statement 6

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
MISCELLANEOUS EXPENSE	43,958.	0.		43,647.
MEALS	14,343.	0.		13,945.
POSTAGE & DELIVERY	2,608.	0.		2,644.
PORTFOLIO DEDUCTIONS	343,799.	332,913.		0.
INSURANCE	11,001.	0.		21,341.
BANK FEES	375.	375.		0.
OTHER INVESTMENT EXPENSES	4,644.	4,644.		0.
To Form 990-PF, Pg 1, ln 23	420,728.	337,932.		81,577.

Form 990-PF

Corporate Stock

Statement 7

<u>Description</u>	<u>Book Value</u>	<u>Fair Market Value</u>
BERKSHIRE HATHAWAY - A	4,590,000.	4,590,000.
GOLDMAN SACHS - DELAWARE LCG	1,487,379.	1,487,379.
GOLDMAN SACHS - EAGLE DYNAMIC EQUITY	3,459,501.	3,459,501.
GOLDMAN SACHS - HARRIS ASSOCIATES: DYNAMIC EQUITY	3,210,036.	3,210,036.
Total to Form 990-PF, Part II, line 10b	12,746,916.	12,746,916.

Form 990-PF

Other Investments

Statement 8

Description	Valuation Method	Book Value	Fair Market Value
DREYFUS STRATEGIC GLOBAL FUND	FMV	4,156,765.	4,156,765.
GS LOCAL EMERGING MKTS DEBT FD	FMV	2,697,549.	2,697,549.
VANGUARD ST CORP FUND	FMV	170,685.	170,685.
UBS 13D ACTIVIST FUND	FMV	1,082,200.	1,082,200.
ARTISAN DYNAMIC EQUITY (GLOBAL EQUITY) LLC	FMV	3,483,956.	3,483,956.
ELLIOTT INTERNATIONAL LIMITED	FMV	2,147,717.	2,147,717.
FIA TIMBER PARTNERS, LP	FMV	137,419.	137,419.
FIA TIMBER PARTNERS II, LP	FMV	1,861,956.	1,861,956.
OCM OPPORTUNITIES FUND VI	FMV	243.	243.
SINO FINANCE GROUP, LLC	FMV	590,897.	590,897.
SOUTH STREET CAPITAL, LP	FMV	10,014,782.	10,014,782.
SOUTH STREET CAPITAL II, LLC	FMV	2,744,514.	2,744,514.
SOWOOD ALPHA FUND, LP	FMV	12,731.	12,731.
Total to Form 990-PF, Part II, line 13		29,101,414.	29,101,414.

Form 990-PF

Other Assets

Statement 9

Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value
SECURITY DEPOSIT	61,816.	61,816.	61,816.
FEDERAL EXCISE TAX RECEIVABLE	63,051.	18,000.	18,000.
To Form 990-PF, Part II, line 15	124,867.	79,816.	79,816.

Form 990-PF

Other Liabilities

Statement 10

Description

BOY Amount

EOY Amount

DEFERRED FEDERAL EXCISE TAX
EXCISE TAXES PAYABLE

170,493.

8,039.

66,500.

0.

Total to Form 990-PF, Part II, line 22

236,993.

8,039.

Form 990-PF

Explanation Concerning Part VII-A, Line 12
Qualifying Distribution Statement

Statement 11

Explanation

During 2018 the Foundation made a contribution to a donor advised fund as part of its Director's Discretionary Program for Directors. This contribution was treated as a qualifying distribution. Contributions to this Fund are exclusively for charitable purposes under Section 170(c)(2)(B).

WILLIAM E. SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
1/5/2018	Sound Body Sound Mind 11100 Santa Monica Blvd Suite 1910 Los Angeles, California 90025	Pledge - Program Support for 2018, 2019, and 2020	\$65,000.00	Others
1/12/2018	From Houses to Homes - Guatemala Inc 12 Farmhouse Lane Morristown, New Jersey 07960	2018 Director's Designated Gift, Program Support	\$2,000.00	Others
1/12/2018	Court Appointed Special Advocates of Morris and Sussex Counties, Inc. 18 Cattano Avenue Morristown, New Jersey 07963-0264	Pledge - Challenge grant for program support for clients in Morristown	\$10,000.00	Family
1/12/2018	Wake Forest University 1834 Wake Forest Road Winston-Salem, North Carolina 27106	2018 Director's Designated Gift, Magnolia Scholars Program	\$25,000.00	Education
1/12/2018	Wake Forest University 1834 Wake Forest Road Winston-Salem, North Carolina 27106	2018 Director's Designated Gift, Annual Fund	\$5,000.00	Education
1/12/2018	Boston Winter Ball c/o KMC Productions, Inc. 150 Wood Road, Suite 300 Braintree, Massachusetts 02184	2018 Director's Designated Gift, Program Support (in lieu of the 10th Annual Boston Winter Ball, in memory of Corey Griffin)	\$25,000.00	Others
1/12/2018	Rocking the Boat 812 Edgewater Road Bronx, New York 10474	Pledge - Challenge grant for Job Skills Program	\$10,000.00	Family
1/12/2018	Richard Nixon Foundation 18001 Yorba Linda Boulevard Yorba Linda, California 92886	Pledge - Centennial Legacy Campaign	\$250,000.00	Others
1/12/2018	UCLA Foundation 10920 Wilshire Blvd, 11th Floor Los Angeles, California 90024	2018 Director's Designated Gift, Luskin School of Public Affairs Simon Fellowships	\$25,000.00	Education

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
1/12/2018	Big Brothers Big Sisters of Northern New Jersey 333 Rt. 46 West, Suite 205 Mountain Lakes, New Jersey 07046	Pledge - Challenge grant for support for site-based mentoring in Morristown in the 2017-18 school year	\$20,000.00	Family
1/12/2018	First Presbyterian Church of New Vernon PO Box 218 New Vernon, New Jersey 07976	2018 Director's Designated Gift, Annual Fund	\$5,000.00	Faith
1/12/2018	Canal Alliance 91 Larkspur Street San Rafael, California 94901	Support for the University Prep program	\$5,000.00	Family
1/12/2018	Women Rising, Inc. 270 Fairmount Avenue Jersey City, New Jersey 07306	Pledge - challenge grant for general support	\$20,000.00	Family
1/12/2018	Donors Trust 1800 Diagonal Road Suite 280 Alexandria, Virginia 22314	2018 Director's Designated Gifts, Program Support	\$100,000.00	Others
1/12/2018	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	Pledge - Support for Project Independence in 2018	\$200,000.00	Family
1/12/2018	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2018 Director's Designated Gift, Breast Center Expansion Campaign	\$10,000.00	Others
1/12/2018	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2018 Director's Designated Gift, Breast Center Expansion Campaign	\$10,000.00	Others
1/12/2018	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2018 Director's Designated Gift, Breast Center Expansion Campaign	\$10,000.00	Others

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
1/12/2018	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2018 Director's Designated Gift, Women's Health Clinic	\$10,000.00	Others
1/12/2018	Morristown-Bearde School 70 Whippany Road Morristown, New Jersey 07960	2018 Director's Designated Gift, "Transforming Our Future" Capital Campaign	\$15,000.00	Education
1/12/2018	Newark Academy 91 South Orange Avenue Livingston, New Jersey 07039	2018 Director's Designated Gift, Alex Bloom Scholarship Fund	\$8,450.00	Education
1/12/2018	Episcopal High School 1200 North Quaker Lane Alexandria, Virginia 22302	2018 Director's Designated Gift, Annual Fund	\$2,500.00	Education
1/12/2018	Saving Teens In Crisis Collaborative PO Box 193 Wallingford, Connecticut 06492	2018 Director's Designated Gift, Program Support	\$2,500.00	Family
1/12/2018	Middlebridge School 333 Ocean Road Narragansett, Rhode Island 02882	2018 Director's Designated Gift, Program Support	\$10,000.00	Education
1/12/2018	Peck School 247 South Street Morristown, New Jersey 07960	2018 Director's Designated Gift, Capital Campaign	\$25,000.00	Education
1/12/2018	Red Oaks School 21 Cutler Street Morristown, New Jersey 07960	2018 Director's Designated Gift, "Phantom" Capital Campaign	\$25,000.00	Education
1/12/2018	Red Oaks School 21 Cutler Street Morristown, New Jersey 07960	2018 Director's Designated Gift, Annual Fund	\$25,000.00	Education
1/19/2018	Sky's the Limit Fund Sobrato Center for Nonprofits 510A Valley Way Milpitas, California 95035	2018 Director's Designated Gift, Support for True North Wilderness Program	\$1,500.00	Others
1/19/2018	Liberty in North Korea 236 E 3rd St, Ste 210 Long Beach, California 90802	2017 Employee Matching Gift, Program Support	\$895.00	Others
1/19/2018	Exodus Road P O. Box 1681 Colorado Springs, Colorado 80901	2017 Employee Matching Gift, Program Support	\$250.00	Others

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
1/19/2018	Dominican Foundation 141 E. 65th Street New York, New York 10065	2018 Staff Designated Gift, Father John McGuire Memorial Scholarship Fund	\$500.00	Faith
1/19/2018	Darien Library 1441 Post Road Darien, Connecticut 06820	2018 Staff Designated Gift, Program Support	\$500.00	Others
1/19/2018	World Vision, Inc. P O Box 9716 Federal Way, Washington 98063	2017 Employee Matching Gift, Program Support	\$668.00	Others
1/19/2018	Summer Search 90 Broad Street Suite 701 New York, New York 10004	2017 Employee Matching Gift, Program Support	\$100.00	Family
1/19/2018	Malta House 5 Prowitt Street Norwalk, Connecticut 06855	2018 Staff Designated Gift, Program Support	\$500.00	Family
1/19/2018	Our Lady of Good Counsel Church 155 West Parkway P.O Box 218 Pompton Plains, New Jersey 07444	2017 Employee Matching Gift, Program Support	\$150.00	Faith
1/19/2018	Saint Joseph Church 216 Comly Road Lincoln Park, New Jersey 07035	2017 Employee Matching Gift, Program Support	\$75.00	Faith
1/19/2018	Little Sisters of the Poor 140 Shepherd Lane Totowa, New Jersey 07512-2170	2017 Employee Matching Gift, Program Support	\$100.00	Faith
1/19/2018	Saint Joseph's Indian School 1301 North Main Street Chamberlain, South Dakota 57326	2017 Employee Matching Gift, Program Support	\$50.00	Education
1/19/2018	Hill House 10 Riverside Avenue Riverside, Connecticut 06878	2017 Employee Matching Gift, Program Support	\$100.00	Others
1/19/2018	Building One Community 75 Selleck Street Stamford, Connecticut 06905	2017 Employee Matching Gift, Program Support	\$125.00	Family
1/19/2018	Meals-on-Wheels, Inc 89 Maple Avenue Greenwich, Connecticut 06830	2017 Employee Matching Gift, Program Support	\$100.00	Others

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
1/19/2018	Spring Street Community Development Corp 65 Spring St. Morristown, New Jersey 07960	Pledge - Challenge grant for Program Support	\$4,000.00	Family
1/19/2018	Goucher College 1021 Dulaney Valley Road Baltimore, Maryland 21204	2017 Employee Matching Gift, Program Support	\$500.00	Education
1/19/2018	Luther College 700 College Drive Decorah, Iowa 52101	2017 Employee Matching Gift, Program Support	\$75.00	Education
1/19/2018	International Justice Mission P O. Box 96961 Washington, District of Columbia 20090-6961	2017 Employee Matching Gift, Program Support	\$750.00	Others
1/29/2018	Moving Picture Institute Tribeca Film Center 375 Greenwich Street New York, New York 10013	Support for the "Miss Virginia" film project	\$5,000.00	Education
1/29/2018	New York Botanical Garden 2900 Southern Blvd Bronx, New York 10458	2018 Employee Matching Gift, Program Support	\$135.00	Others
1/29/2018	Seeing Eye P O. Box 375 Morristown, New Jersey 07963-0375	Program Support	\$5,000.00	Others
2/5/2018	Marist Brothers Center Esopus PO Box 197 Esopus, New York 12429	Support for the Mid- Hudson Valley Camp's Sacred Heart Camp	\$2,500.00	Faith
2/5/2018	Marist Brothers Center Esopus PO Box 197 Esopus, New York 12429	2018 Director's Designated Gift, Support for the Mid- Hudson Valley Camp's Sacred Heart Camp	\$2,500.00	Faith
2/5/2018	Washington Association of New Jersey P.O. Box 1473 Morristown, New Jersey 07962	Program Support	\$3,000.00	Others
2/12/2018	Boy Scouts of America Patriots' Path Council 1 Saddle Rd. Cedar Knolls, New Jersey 07927	2018 Staff Designated Gift, Program Support	\$500.00	Family

WILLIAM E SIMON FOUNDATION

EIN 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
2/12/2018	Family Life Academy Charter School 296 East 140th Street Bronx, New York 10454	Pledge - Challenge grant for wellness program in the 2017-18 school year	\$10,000.00	Family
2/12/2018	Greenwich Town Party P O Box 59 Old Greenwich, Connecticut 06870	2018 Director's Designated Gift, Program Support	\$5,000.00	Others
2/12/2018	Mendham Borough HSA 12 Hilltop Road Mendham, New Jersey 07945	2018 Staff Designated Gift, Program Support	\$500.00	Education
2/12/2018	Huntsman Cancer Foundation 500 Huntsman Way Salt Lake City, Utah 84108	Program Support, in memory of Jon M. Huntsman, Sr	\$2,500.00	Others
2/12/2018	Philanthropy Roundtable 1120 20th Street NW Suite 550 South Washington, District of Columbia 20036	Pledge - William E. Simon Prize for Philanthropic Leadership in 2018 and 2019	\$270,000.00	WES Prizes\Philanthropic Leadership
2/12/2018	Paper Mill Playhouse 22 Brookside Drive Millburn, New Jersey 07041	Program Support (in lieu of the Annual Gala on May 11, 2018)	\$1,000.00	Others
2/12/2018	Morris Educational Foundation P.O. Box 1224 Morristown, New Jersey 07962-1224	Program Support (in lieu of the Morristown ONSTAGE event on February 28, 2018)	\$350.00	Education
2/20/2018	Epiphany School Foundation 234 East 22nd Street New York, New York 10010	2018 Employee Matching Gift, Program Support	\$100.00	Education
2/20/2018	Loyola School 980 Park Avenue New York, New York 10028	2018 Employee Matching Gift, Program Support	\$100.00	Education
2/26/2018	Mercy Center 377 East 145th Street Bronx, New York 10454	Pledge - Challenge grant for Program Support	\$25,000.00	Family
2/26/2018	Police Athletic League Inc. 34 1/2 East 12th Street New York, New York 10003	Program Support (in lieu of the 20th Annual Professional Luncheon on April 12, 2018)	\$500.00	Others
2/26/2018	Institute for Justice 901 N Glebe Road Suite 900 Arlington, Virginia 22203	Support for litigation work on school choice issues	\$15,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
2/26/2018	Foundation for Cultural Review, Inc 900 Broadway New York, New York 10003	Program Support (in lieu of the 6th Annual Edmund Burke Award for Service to Culture and Society Dinner on April 25, 2018)	\$2,500.00	Education
2/26/2018	World Vision, Inc P.O. Box 9716 Federal Way, Washington 98063	2017 Employee Matching Gift, Program Support	\$420.00	Others
3/5/2018	Part of the Solution 2759 Webster Avenue Bronx, New York 10458-3708	Support for distribution of fresh produce	\$10,000.00	Others
3/5/2018	Student Partner Alliance 561 Springfield Avenue Summit, New Jersey 07901	Support for scholarships and mentoring for high school students in Jersey City in the 2018-19 school year (outright)	\$7,500.00	Education\Scholarship / Tuition Asst.
3/5/2018	Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, New York 10017	Pledge - Support for the 2018 William E. Simon Forum	\$35,000.00	WES Prizes\Social Entrepreneurship
3/5/2018	Assumption College for Sisters 200 A Morris Avenue Denville, New Jersey 07834	Program Support (in lieu of the Caring Basket Gala on March 22, 2018)	\$500.00	Education
3/5/2018	Karen Ann Quinlan Hospice 99 Sparta Avenue Newton, New Jersey 07860	2018 Employee Matching Gift, Program Support	\$25.00	Others
3/5/2018	South Bronx United 594 Grand Concourse, Suite 2 Bronx, New York 10451	Program Support (outright)	\$15,000.00	Family
3/5/2018	National Eating Disorders Association 165 West 46th Street, Suite 1211 New York, New York 10036	Program Support (in lieu of the Annual Gala on May 16, 2018)	\$250.00	Others
3/5/2018	National Kidney Foundation 30 E. 33rd Street New York, New York 10016	2018 Employee Matching Gift, 2018 St. Louis Kidney Walk (in support of Anne Allred - 5 On Your Side)	\$100.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
3/12/2018	Safe Passage Project 185 W. Broadway New York, New York 10013	Program Support	\$5,000.00	Family
3/12/2018	New Jersey SEEDS 494 Broad Street, Suite 105 Newark, New Jersey 07102	Support for Jersey City students in the 2017-18 school year	\$15,000.00	Education\Scholarship / Tuition Asst
3/12/2018	Good Grief 38 Elm Street Morristown, New Jersey 07960	2018 Director's Designated Gift, Program Support	\$25,000.00	Family
3/12/2018	50CAN 1625 K Street NW Suite 400 Washington, District of Columbia 20006	Support for NYCAN: The New York Campaign for Achievement Now	\$25,000.00	Education
3/12/2018	Covenant House New Jersey 330 Washington Street Newark, New Jersey 07102	Pledge - Challenge Grant for Jersey City Site in 2017	\$50,000.00	Family
3/12/2018	Boys and Girls Clubs of Newark 1 Avon Avenue Newark, New Jersey 07108	Program Support (in lieu of the Evening of the Stars on April 26, 2018)	\$500.00	Family
3/12/2018	Women for Women International 2000 M Street, NW Suite 200 Washington, District of Columbia 20036	2018 Director's Designated Gift, Program Support (in lieu of the 2018 Annual Luncheon on May 1, 2018)	\$5,000.00	Others
3/12/2018	Saint Peter's University 2641 Kennedy Blvd. Jersey City, New Jersey 07306	Support for Campus Ministry kitchen renovations (outright)	\$10,000.00	Faith
3/12/2018	Freedom Institute 515 Madison Avenue New York, New York 10022	2018 Director's Designated Gift, Program Support	\$5,000.00	Others
3/19/2018	Saint Peter's Episcopal Church 70 Maple Avenue Morristown, New Jersey 07960	Pledge - Challenge grant for bilingual summer camp in summer 2017	\$5,000.00	Faith
3/19/2018	Massachusetts Audubon Society 208 South Great Road Lincoln, Massachusetts 01773	2018 Director's Designated Gift, Program Support	\$20,000.00	Others
3/19/2018	Chatham Food Pantry 625 Main Street Chatham, Massachusetts 02633	2018 Director's Designated Gift, Chatham Food Pantry	\$10,000.00	Others

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
3/19/2018	Harwich Conservation Trust PO Box 101 South Harwich, Massachusetts 02661	2018 Director's Designated Gift, Program Support	\$10,000.00	Others
3/19/2018	Cape Cod Symphony Orchestra 1060 Falmouth Road, Suite A Hyannis, Massachusetts 02601	2018 Director's Designated Gift, Program Support	\$20,000.00	Others
3/19/2018	Frost Valley YMCA 2000 Frost Valley Road Claryville, New York 12725	2018 Director's Designated Gift, Program Support	\$20,000.00	Others
3/19/2018	Saint Ignatius School 740 Manida Street Bronx, New York 10474	Pledge - challenge grant for operating support in the 2014-15, 2015-16, 2016-17, and 2017-18 school years	\$20,000.00	Education
3/19/2018	Yogi Berra Museum and Learning Center 8 Yogi Berra Drive Little Falls, New Jersey 07424	Program Support (in lieu of the 2nd Annual Yogi Berra Museum Awards Dinner on April 20, 2018)	\$1,000.00	Others
3/19/2018	Newark Academy 91 South Orange Avenue Livingston, New Jersey 07039	2018 Director's Designated Gift, Program Support	\$20,000.00	Education
3/19/2018	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2018 Director's Designated Gift, Women's Health Philanthropy Council	\$10,000.00	Others
3/26/2018	John Fisher Seminary 894 Newfield Avenue Stamford, Connecticut 06905	2018 Employee Matching Gift, Program Support	\$100.00	Faith
3/26/2018	Mayo Performing Arts Center 100 South Street Morristown, New Jersey 07960	Program Support for the Paterson After-School Arts Enrichment Program	\$1,500.00	Education
3/26/2018	Freedom Institute 515 Madison Avenue New York, New York 10022	2018 Director's Designated Gift, Program Support	\$5,000.00	Others
4/2/2018	Loyola School 980 Park Avenue New York, New York 10028	2018 Staff Designated Gift, Program Support	\$1,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
4/2/2018	Interfaith Food Pantry 2 Executive Drive Morris Plains, New Jersey 07950	Pledge - Challenge grant for program Support	\$5,000 00	Others
4/2/2018	National Council for Adoption 225 North Washington Street Alexandria, Virginia 22314-2520	Pledge - Challenge Grant for Program Support	\$50,000.00	Family
4/2/2018	Epiphany School Foundation 234 East 22nd Street New York, New York 10010	2018 Staff Designated Gift, Program Support	\$1,000 00	Education
4/9/2018	Caron New York 244 East 58th Street New York, New York 10022	Program Support (in lieu of the 2018 Annual Gala on May 9, 2018 honoring Elaine and Anthony Grillo)	\$500.00	Others
4/9/2018	Summit Medical Group Foundation 150 Floral Avenue New Providence, New Jersey 07974	2018 Staff Designated Gift, Program Support	\$1,000.00	Others
4/9/2018	Preschool Advantage 25 Lindsley Drive Suite 307 Morristown, New Jersey 07960	Program Support for the 2018-19 school year (in lieu of the Turning Leaves Annual Benefit on Wednesday, October 17, 2018 honoring Massey Quick Simon)	\$8,850.00	Education
4/9/2018	Cristo Rey Newark 239 Woodside Avenue Newark, New Jersey 07104-3113	Support for the Corporate Work Study Program in the 2018-19 year	\$7,500 00	Education
4/9/2018	Squash and Education Alliance 555 Eighth Avenue Suite 1102 New York, New York 10018	Program Support in the 2017-18 school year	\$20,000.00	Family
4/9/2018	Franciscan Missionaries of the Eternal Word 5821 Old Leeds Road Irontdale, Alabama 35210-2164	2018 Employee Matching Gift, Program Support	\$125.00	Faith
4/9/2018	University of Virginia Office of Sponsored Programs P O. Box 400195 Charlottesville, Virginia 22904-4195	Support for the National Marriage Project	\$35,000 00	Family

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
4/9/2018	Madison Area YMCA 111 Kings Road Madison, New Jersey 07940	Capital Campaign	\$25,000.00	Others
4/9/2018	Good Counsel 411 Clinton Street P.O. Box 6068 Hoboken, New Jersey 07030-2780	Support for the South Bronx home (outright)	\$7,500.00	Family
4/16/2018	Our Lady of Good Counsel Church 155 West Parkway P.O. Box 218 Pompton Plains, New Jersey 07444	2018 Employee Matching Gift, Program Support	\$150.00	Faith
4/16/2018	New City Kids 240 Fairmount Avenue Jersey City, New Jersey 07306	Pledge - Challenge Grant for capital project	\$81,000.00	Faith
4/16/2018	Georgetown University 3307 M Street Suite 200 Washington, District of Columbia 20057	Support for the Berkley Center's Religious Freedom Research Project in 2018	\$35,000.00	Faith
4/16/2018	Tri-County Scholarship Fund 4 Century Drive 1st Floor Parsippany, New Jersey 07054	Pledge - Scholarship support for students in Morris County in the 2017-18 and 2018-19 school years (outright)	\$40,000.00	Education\Scholarship / Tuition Asst
4/16/2018	Tri-County Scholarship Fund 4 Century Drive 1st Floor Parsippany, New Jersey 07054	Pledge - Challenge grant for scholarship support for students in Morris County in the 2017-18 and 2018-19 school years	\$10,000.00	Education
4/16/2018	Church of the Holy Spirit 318 Newark-Pompton Turnpike Pequannock, New Jersey 07440	2018 Employee Matching Gift, Program Support	\$50.00	Faith
4/16/2018	Ramapo for Children 49 West 38th Street 5th Floor New York, New York 10018	Workshops in the South Bronx for parents and educators of special needs children in the 2018-19 school year (outright)	\$7,500.00	Family
4/16/2018	Ramapo for Children 49 West 38th Street 5th Floor New York, New York 10018	Workshops in Jersey City for parents and educators of special needs children in the 2018-19 school year (outright)	\$7,500.00	Family

WILLIAM E SIMON FOUNDATION

EIN 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
4/16/2018	Trustbridge Hospice Foundation 5300 East Avenue West Palm Beach, New York 33407	2018 Employee Matching Gift, Program Support	\$25 00	Others
4/16/2018	Shakespeare Theatre of New Jersey, Inc 36 Madison Avenue Madison, New Jersey 07940	Program Support	\$500 00	Education
4/23/2018	Morristown-Beard School 70 Whippany Road Morristown, New Jersey 07960	2018 Director's Designated Gift, Center for Innovation and Design	\$10,000 00	Education
4/23/2018	Saint Peter's University Hospital Child Life Program 254 Easton Avenue Brunswick, New Jersey 08901	2018 Staff Designated Gift, Child Life Program	\$1,500.00	Others
4/23/2018	Roots and Wings Foundation 75 Bloomfield Avenue Suite 303 Denville, New Jersey 07834	Program Support	\$13,000.00	Family
4/23/2018	Vroom Street Church 155 Vroom Street Jersey City, New Jersey 07306	Pledge - Challenge grant for faith-based summer youth program in 2017	\$5,000 00	Faith
4/23/2018	National Alliance for Public Charter Schools 1101 15th Street NW Suite 1010 Washington, District of Columbia 20005	Program Support (outright)	\$20,000 00	Education
4/23/2018	Ethical Community Charter School 95 Broadway Jersey City, New Jersey 07306-6304	Support for tutoring, the iReady toolbox, an ELA coach, and Math professional development in the 2018-19 school year (Outright)	\$40,000.00	Education
4/23/2018	Acton Institute for the Study of Religion and Liberty 98 Fulton Street E Grand Rapids, Michigan 49503	City FAVS Conference in 2018	\$45,000.00	Faith
4/23/2018	Renew International 1232 George Street Plainfield, New Jersey 07062-1717	Program Support in honor of 40th Anniversary	\$5,000 00	Faith

WILLIAM E. SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
4/23/2018	Saint Mary Abbey 230 Mendham Road Morristown, New Jersey 07960	Program Support (in lieu of the Abbot's Table Event on May 16, 2018 - in memory of Abbot Giles)	\$1,000.00	Faith
5/1/2018	Little Sisters of the Poor 140 Shepherd Lane Totowa, New Jersey 07512-2170	2018 Employee Matching Gift, Program Support	\$100.00	Faith
5/1/2018	Great Swamp Watershed Association P O. Box 300 New Vernon, New Jersey 07976	Program Support	\$500.00	Others
5/1/2018	United Way of Hudson County 857 Bergen Avenue Jersey City, New Jersey 07306	After-School Program	\$5,000 00	Family
5/1/2018	Saint Pius X Church 24 Changebridge Road Montville, New Jersey 07045	2018 Employee Matching Gift, Program Support	\$25.00	Faith
5/1/2018	All Saints Episcopal Church 151 South Ann Street Mobile, Alabama 36604	2018 Employee Matching Gift, Program Support	\$25 00	Faith
5/1/2018	New England College 7 Main Street Henniker, New Hampshire 03242-3293	2018 Director's Designated Gift, Annual Fund	\$10,000.00	Education
5/1/2018	Maryknoll Society P.O. Box 302 Maryknoll, New York 10545-0304	2018 Employee Matching Gift, Program Support	\$25 00	Faith
5/1/2018	Drexel Fund 606 E Juneau Ave, #510635 Milwaukee, Wisconsin 53203	Program Support	\$15,000.00	Education
5/2/2018	Parish Catalyst 11100 Santa Monica Blvd Suite 1910 Los Angeles, California 90025	Pledge - Program Support in 2018 and 2019	\$250,000.00	Faith
5/7/2018	Daytop New Jersey P.O. Box 310 80 West Main Street Mendham, New Jersey 07945	Program Support (in lieu of the 6th Annual Mary Mulholland Memorial Golf Classic on June 14, 2018)	\$150 00	Others

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
5/7/2018	Harvard University John F Kennedy School of Government 79 JF Kennedy Street, Taubman 304 Cambridge, Massachusetts 02138	Pledge - Support for the journal Education Next	\$35,000.00	Education
5/7/2018	LAMP Ministries 2704 Schurz Avenue Bronx, New York 10465- 3173	Pledge - Challenge grant for support for missionary work in the South Bronx	\$2,500.00	Faith
5/7/2018	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	Program support for the Morristown pregnancy support center in 2018 (outright)	\$17,500.00	Family
5/7/2018	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	Program support for the Jersey City pregnancy support center in 2018 (outright)	\$17,500.00	Family
5/7/2018	Witherspoon Institute 16 Stockton Street Princeton, New Jersey 08540	Pledge - William E and Carol G Simon Center on Religion and the Constitution in 2016, 2017 and 2018	\$100,000.00	Faith
5/7/2018	Summer Search 90 Broad Street Suite 701 New York, New York 10004	Support for South Bronx programs in the 2018- 19 year (outright)	\$40,000.00	Family
5/7/2018	Summer Search 90 Broad Street Suite 701 New York, New York 10004	Pledge - Challenge grant for South Bronx programs in the 2017- 18 school year	\$10,000.00	Family
5/14/2018	Ethics and Public Policy Center 1730 M Street, NW Suite 910 Washington, District of Columbia 20036	Support for the William E. Simon Chair in Catholic Studies and Simon Lecture	\$200,000.00	Faith
5/14/2018	Freedom Institute 515 Madison Avenue New York, New York 10022	2018 Director's Designated Gift, Program Support	\$5,000.00	Others
5/14/2018	Boys and Girls Clubs of Hudson County 225 Morris Blvd. Jersey City, New Jersey 07302	Support for Healthy Habits. Triple Play program in the 2017-18 school year (outright)	\$25,000.00	Family

WILLIAM E SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
5/14/2018	Stanford Law School Crown Quadrangle 559 Nathan Abbott Way Stanford, California 94305	Program support for the Religious Liberty Clinic	\$35,000.00	Faith
5/14/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Staff Designated Gift, Program Support	\$500.00	Family
5/14/2018	Matawan United Methodist Church 478 Atlantic Avenue Aberdeen, New Jersey 07747	2018 Staff Designated Gift, Program Support	\$1,500.00	Family
5/14/2018	Quill 55 Exchange Place, #405 New York, New York 10005	Program Support for their online writing curriculum	\$5,000.00	Education
5/22/2018	Friends of Learning Community Charter School 2495 Kennedy Boulevard Jersey City, New Jersey 07304	Pledge - Challenge grant for Math and Reading Middle School Intervention Program in the 2017-18 school year	\$10,000.00	Family
5/22/2018	Partnership for Inner- City Education 1011 First Avenue 18th Floor New York, New York 10022	Program Support for the Bronx schools in the 2017-18 school year (outright)	\$60,000.00	Education
5/22/2018	Leadership Network 12700 Park Central Drive Suite 500 Dallas, Texas 75251	In memory of Bob Buford	\$5,000.00	Faith
5/22/2018	Outward Bound California P.O. Box 29632 San Francisco, California 94129	2018 Director's Designated Gift, Pinnacle Scholarships	\$5,000.00	Education
5/22/2018	Hunts Point Alliance for Children P O. Box 740190 Bronx, New York 10474	Pledge - Challenge grant for program support in the 2017-18 school year	\$25,000.00	Family
5/22/2018	Seton Education Partners 7765 Orien Avenue La Mesa, California 91941	Support for planning grants for two more Brilla charter sites (outright)	\$60,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
5/22/2018	Soaring Heights Charter School 1 Romar Avenue Jersey City, New Jersey 07305	Pledge - Challenge grant for math intervention program and an after-school academic enrichment program in the 2017-18 school year	\$10,000.00	Education
5/22/2018	American Federation for Children Growth Fund 1020 19th Street, NW Suite 675 Washington, District of Columbia 20036	Program Support	\$100,000.00	Education
5/22/2018	Cornelia Connelly Center 220 East 4th Street New York, New York 10009	Program Support	\$5,000.00	Education
5/22/2018	Covenant House New Jersey 330 Washington Street Newark, New Jersey 07102	Program Support for Jersey City in 2018 (outright)	\$62,500.00	Family
5/22/2018	Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, New York 10017	Support for Kay Hymowitz as the William E. Simon Fellow in 2018	\$75,000.00	Family
5/29/2018	National Pancreas Foundation 3 Bethesda Metro Center Suite 700 Bethesda, Maryland 20814	Program Support	\$1,000.00	Others
5/29/2018	National Review Institute 19 W. 44th Street Suite 1701 New York, New York 10036	Support for the Center for Religion, Culture & Civil Society	\$7,500.00	Faith
5/29/2018	Good Grief 38 Elm Street Morristown, New Jersey 07960	2018 Director's Designated Gift, Kitchen Remodel	\$5,500.00	Family
5/29/2018	Church of Saint John Nepomucene 411 East 66th Street New York, New York 10065	2018 Staff Designated Gift, Program Support	\$1,000.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
5/29/2018	Hamilton Partnership for Paterson 72 McBride Avenue 2nd Floor Paterson, New Jersey 07501	Support for the Hamilton Visitor Center	\$10,000.00	Others
5/29/2018	Catholic Schools Foundation 67 Batterymarch Street 6th Floor Boston, Massachusetts 02110	Support for partial scholarships in the 2017- 18 year	\$10,000.00	Education\Scholarship / Tuition Asst.
5/29/2018	Elon University Johnston Hall 213 2300 Campus Box Elon, North Carolina 27244	2018 Director's Designated Gift, Odyssey Scholars	\$16,667.00	Education
5/29/2018	Raptor Trust 1390 White Bridge Road Millington, New Jersey 07946	2018 Director's Designated Gift, Program Support	\$1,000.00	Others
6/4/2018	Random Acts of Flowers 3500 Workman Road #101A Knoxville, Tennessee 37921	2018 Director's Designated Gift, Program Support	\$25,000.00	Others
6/4/2018	Heritage Foundation 214 Massachusetts Avenue, N E. Washington, District of Columbia 20002-4999	Support for Ryan Anderson as the William E. Simon Fellow in American Principals and Public Policy in 2018	\$75,000.00	Faith
6/4/2018	Big Brothers Big Sisters of Essex, Hudson, and Union Counties 500 Broad St., 2nd Floor Newark, New Jersey 07102	Mentoring programs for youth in Jersey City (outright)	\$100,000.00	Family
6/4/2018	Classical Charter Schools 977 Fox Street Bronx, New York 10459	Pledge - Challenge grant for the 2017 Summer Learning Academy, including the Kindergarten Preparatory Program	\$15,000.00	Education
6/4/2018	Children's Scholarship Fund 8 West 38th Street, 9th Floor New York, New York 10018-6229	2018 Employee Matching Gift, Program Support	\$100.00	Education

WILLIAM E. SIMON FOUNDATION

EIN 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
6/4/2018	GuideStar 4801 Courthouse Street Suite 220 Williamsburg, Virginia 23188	Program Support	\$1,000.00	Others
6/4/2018	Community Foundation of New Jersey P.O. Box 338 35 Knox Hill Road Morristown, New Jersey 07963-0317	Support for the Morristown Festival of Books	\$5,000.00	Education
6/11/2018	Community Soup Kitchen 36 South Street Morristown, New Jersey 07960	Support for the Breakfast Program	\$7,500.00	Others
6/11/2018	Saint Peter's Episcopal Church 70 Maple Avenue Morristown, New Jersey 07960	Support for bilingual summer camp in summer 2018 (outright)	\$15,000.00	Faith
6/11/2018	Classical Charter Schools 977 Fox Street Bronx, New York 10459	Support for the 2018 Summer Learning Academy, including the Kindergarten Preparatory Program (outright)	\$30,000.00	Education
6/11/2018	Interfaith Food Pantry 2 Executive Drive Morris Plains, New Jersey 07950	Program Support (outright)	\$7,500.00	Others
6/11/2018	New Jersey Special Olympics P O Box 3589 Princeton, New Jersey 08543	2018 Employee Matching Gift, Program Support	\$25.00	Others
6/11/2018	Homeless Solutions, Inc. 3 Wing Drive, Suite 245 Cedar Knolls, New Jersey 07927	Program Support	\$10,000.00	Others
6/11/2018	Philanthropy Roundtable 1120 20th Street NW Suite 550 South Washington, District of Columbia 20036	Support for the K-12 education prize in 2019	\$30,000.00	WES Prizes\Social Entrepreneurship
6/18/2018	Passages America Israel 218 South Main Street Naperville, Illinois 60540	2018 Director's Designated Gift, Program Support	\$5,000.00	Faith

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
6/18/2018	New City Kids 240 Fairmount Avenue Jersey City, New Jersey 07306	Pledge - Challenge Grant for General Operating Support for Jersey City in 2018	\$85,000.00	Family
6/18/2018	Girls Educational and Mentoring Services, Inc 201 West 148th Street, Ground Fl. New York, New York 10039	Program Support for the South Bronx site (outright)	\$10,000.00	Family
6/26/2018	Corpus Christi Parish 880 Toyopa Drive Pacific Palisades, California 90272	2018 Director's Designated Gift, Program Support	\$7,000.00	Faith
6/26/2018	South Bronx Educational Foundation Inc. 843 Crotona Park North Bronx, New York 10460	Pledge - Challenge grant for Program Support	\$10,000.00	Family
6/26/2018	JerseyCAN 11 Commerce Drive, Suite 310 Cranford, New Jersey 07016	Pledge - Challenge grant for Program Support	\$5,000.00	Education
6/26/2018	Elon University Johnston Hall 213 2300 Campus Box Elon, North Carolina 27244	2018 Director's Designated Gift, Leo and Laurie Lambert Odyssey Scholarship Fund	\$10,000.00	Education
7/2/2018	Catholic Education Partners Sagamore Institute 2902 N. Meridian Street Indianapolis, Indiana 46208	Program Support (outright)	\$40,000.00	Education
7/2/2018	FIRST 200 Bedford Street Manchester, New Hampshire 03101-1132	2018 Staff Designated Gift, Program Support	\$1,000.00	Education
7/2/2018	Brilla College Preparatory Charter Schools 413 E. 144th Street Bronx, New York 10454	Pledge - Support for an ELL teacher in the 2018- 19 school year	\$50,000.00	Education
7/2/2018	Cauz for Pawz 333 1st Avenue New York, New York 10003	2018 Staff Designated Gift, Program Support	\$500.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
7/2/2018	Success Academy Charter Schools 95 Pine Street, 6th Floor New York, New York 10005	Pledge - Support for the South Bronx schools in the 2018-19 school year (outright)	\$100,000.00	Education
7/2/2018	Soaring Heights Charter School 1 Romar Avenue Jersey City, New Jersey 07305	Pledge - Support for math intervention program and academic enrichment programs in the 2018-19 school year (outright)	\$60,000.00	Education
7/2/2018	Saint Ignatius School 740 Manida Street Bronx, New York 10474	Support for the Graduate Support Program in the 2018-19 school year (outright)	\$35,000.00	Education\Academic Enhancement
7/2/2018	Assumption College for Sisters 200 A Morris Avenue Denville, New Jersey 07834	Pledge - Scholarship support for one sister in the 2018-19, 2019-20 and 2020-21 school years	\$10,000.00	Education
7/9/2018	Jersey Battered Women's Services P O Box 1437 Morristown, New Jersey 07962	Program Support (in lieu of the 19th Annual Hope Classic on July 16, 2018)	\$500.00	Family
7/10/2018	Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, New York 10017	Pledge - Support for the 2018 William E. Simon Forum	-\$35,000.00	WES Prizes\Social Entrepreneurship
7/17/2018	Dartmouth College 6066 Development Office Hanover, New Hampshire 03755-4400	2018 Employee Matching Gift, Program Support	\$100.00	Education
7/17/2018	BlinkNow Foundation P.O. Box 453 Mendham, New Jersey 07945	Program Support	\$5,000.00	Others
7/17/2018	Rising Tide Capital 384 Martin Luther King Drive Jersey City, New Jersey 07305	Program Support (in lieu of the "Start Something RISE Event" on November 8, 2018)	\$1,000.00	Others
7/17/2018	Vroom Street Church 155 Vroom Street Jersey City, New Jersey 07306	Support for the 2018 July Jamboree (outright)	\$35,000.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
7/23/2018	National Alliance for Public Charter Schools 1101 15th Street NW Suite 1010 Washington, District of Columbia 20005	Pledge - Challenge grant for program support	\$20,000.00	Education
7/23/2018	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	Pledge - Challenge grant to support the Morristown pregnancy support center in 2018	\$7,500.00	Family
7/23/2018	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	Pledge - Challenge grant to support the Jersey City pregnancy support center in 2018	\$7,500.00	Family
7/23/2018	Children's Scholarship Fund 8 West 38th Street, 9th Floor New York, New York 10018-6229	Pledge - Scholarships for students to attend private schools in Jersey City in 2016-17, 2017-18, 2018-19, and 2019-20	\$236,250.00	Education\Scholarship / Tuition Asst.
7/23/2018	Binnacle House P O Box 2397 Flemington, New Jersey 08822	2018 Staff Designated Gift, Program Support	\$1,000.00	Family
7/23/2018	Morris Arts 14 Maple Avenue, Suite 301 Morristown, New Jersey 07960	Pledge - Challenge grant for support of the "Girls Surviving" mentoring program in the 2017-18 school year	\$2,500.00	Family
8/1/2018	New England College 7 Main Street Henniker, New Hampshire 03242-3293	2018 Director's Designated Gift, Annual Fund	\$25,000.00	Education
8/1/2018	New England College 7 Main Street Henniker, New Hampshire 03242-3293	2018 Director's Designated Gift, Capital Campaign for Performing Arts Building	\$25,000.00	Education
8/1/2018	Student Partner Alliance 561 Springfield Avenue Summit, New Jersey 07901	Pledge - Challenge grant for support for scholarships and mentoring for high school students in Jersey City in the 2018-19 school year	\$2,500.00	Education\Scholarship / Tuition Asst.

WILLIAM E. SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
8/1/2018	Sound Body Sound Mind 11100 Santa Monica Blvd Suite 1910 Los Angeles, California 90025	Program Support	\$10,000.00	Others
8/6/2018	Blacks in Law Enforcement Servicing the Community 155 Woodlawn Avenue Jersey City, New Jersey 07305	Program Support (in lieu of the 3rd Annual Fundraiser on August 11, 2018)	\$1,000.00	Family
8/13/2018	Commonweal 475 Riverside Drive, Room 405 New York, New York 10115	Support for "Ordinary Sunday" project for Fall 2019	\$20,000.00	Faith
8/13/2018	Pan Mass Challenge 77 Fourth Avenue Needham, Massachusetts 02194	2018 Director's Designated Gift, Sponsoring Seldon Clarke	\$1,000.00	Others
8/13/2018	Ethical Community Charter School 95 Broadway Jersey City, New Jersey 07306-6304	Pledge - Challenge grant for tutoring, the iReady Teacher Toolbox, an ELA coach, and Math professional development in the 2018-19 school year (Challenge)	\$10,000.00	Education
8/13/2018	Big Brothers Big Sisters of Essex, Hudson, and Union Counties 500 Broad St., 2nd Floor Newark, New Jersey 07102	Program Support (in lieu of the 10th Anniversary Celebration Gala on Nov 3, 2018)	\$5,000.00	Family
8/13/2018	Semper Fi Fund 825 College Blvd Suite 102, PMB 609 Oceanside, California 92057	Support for programs in New York and New Jersey	\$20,000.00	Family
8/13/2018	Court Appointed Special Advocates of Morris and Sussex Counties, Inc 18 Cattano Avenue Morristown, New Jersey 07963-0264	Program Support for clients in Morristown (outright)	\$10,000.00	Family
8/13/2018	Girls Educational and Mentoring Services, Inc. 201 West 148th Street, Ground FI New York, New York 10039	Pledge - Challenge grant for support of the South Bronx site	\$10,000.00	Family

WILLIAM E. SIMON FOUNDATION

EIN- 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
8/13/2018	Children's Scholarship Fund 8 West 38th Street, 9th Floor New York, New York 10018-6229	Pledge - Scholarships for students to attend private schools in the South Bronx in the 2017-18 and 2018-19 school years	\$250,000.00	Education\Scholarship / Tuition Asst.
8/13/2018	Team Walker 373 Communipaw Avenue Jersey City, New Jersey 07304	Pledge - Challenge grant to support the After-School Program for students in grades Pre-K - 3 in the 2017-18 school year	\$10,000.00	Education
8/20/2018	Community Soup Kitchen 36 South Street Morristown, New Jersey 07960	Pledge - Challenge grant to support the Breakfast Program	\$2,500.00	Others
8/20/2018	Stepping Stones Museum for Children 303 West Avenue Norwalk, Connecticut 06850	2018 Employee Matching Gift, Program Support	\$165.00	Others
8/20/2018	Educators for Excellence 80 Pine Street, 28th Floor New York, New York 10005	Program Support for New York programs	\$20,000.00	Education
8/20/2018	Sisters of Saint Francis of Peace 20 Ridge Street Haverstraw, New York 10927-1198	2018 Employee Matching Gift, Program Support	\$25.00	Faith
8/20/2018	Big Brothers Big Sisters of Essex, Hudson, and Union Counties 500 Broad St., 2nd Floor Newark, New Jersey 07102	Pledge - Challenge grant for mentoring programs in Jersey City	\$25,000.00	Family
8/20/2018	Saint John Church 1986 Post Road Darien, Connecticut 06820	2018 Employee Matching Gift, Program Support	\$312.50	Faith
8/20/2018	Yale New Haven Hospital PO Box 1849 New Haven, Connecticut 06508	2018 Employee Matching Gift, Program Support	\$40.00	Others
8/27/2018	Morris Museum 6 Normandy Heights Road Morristown, New Jersey 07960	Program Support (in lieu of the "Boisterous, Beautiful Brass" Gala on October 6, 2018)	\$750.00	Education

WILLIAM E SIMON FOUNDATION

EIN 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
8/27/2018	Center Nursery School 11 Center Street Manchester, Connecticut 06040	2018 Staff Designated Gift, Program Support	\$1,000 00	Education
8/27/2018	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$2,500 00	Others
8/27/2018	Seton Education Partners 7765 Orien Avenue La Mesa, California 91941	Pledge - Challenge grant for support for planning grants for two more Brilla charter sites	\$20,000 00	Education
8/27/2018	Good Grief 38 Elm Street Morristown, New Jersey 07960	Program Support (in lieu of "A Night Among Our Stars" Gala on October 11, 2018)	\$1,000.00	Family
8/27/2018	Sound Body Sound Mind 11100 Santa Monica Blvd Suite 1910 Los Angeles, California 90025	2018 Staff Designated Gift, Program Support	\$1,000 00	Others
8/27/2018	Buoniconti Fund to Cure Paralysis, Inc 1095 NW 14th Terrace Miami, Florida 33136	Program Support (in lieu of the 33rd Annual Great Sports Legends Dinner on September 24, 2018)	\$1,000.00	Others
9/11/2018	Community Foundation of New Jersey P O. Box 338 35 Knox Hill Road Morristown, New Jersey 07963-0317	Pledge - Partial scholarship support for students attending select schools in and around Morristown for 12/13, 13/14, 14/15, 15/16, 16/17, 17/18 and 18/19 school years	\$52,737 50	Education\Scholarship / Tuition Asst.
9/11/2018	Sound Body Sound Mind 11100 Santa Monica Blvd Suite 1910 Los Angeles, California 90025	2018 Staff Designated Gift, Program Support	\$500.00	Others
9/11/2018	Marine Corps Scholarship Foundation 909 N. Washington Street, Suite 400 Alexandria, Virginia 22314	Program Support (in lieu of the Golf Tournament on October 4, 2018)	\$500.00	Education

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
9/11/2018	Epiphany School Foundation 234 East 22nd Street New York, New York 10010	2018 Staff Designated Gift, Program Support	\$500.00	Education
9/11/2018	Jersey City Firefighters Italian American Society 16 Matawan Green Lane Matawan, New Jersey 07748	2018 Staff Designated Gift, Program Support	\$1,500.00	Others
9/17/2018	Phillipsburg Hs Soccer Booster Club c/o Yvonne Reitemeyer 27 Browning Court Phillipsburg, New Jersey 08865	2018 Staff Designated Gift, Program Support	\$1,000.00	Others
9/17/2018	Homes for Our Troops 6 Main Street Taunton, Massachusetts 02780	2018 Staff Designated Gift, Program Support	\$500.00	Others
9/17/2018	Friends of the Children New York P.O. Box 1649 New York, New York 10026	Pledge - Challenge grant for programs in the South Bronx during the 2017-18 school year	\$10,000.00	Family
9/17/2018	Future Five 135 Atlantic Street Stamford, Connecticut 06901	Pledge - Challenge grant for Program Support	\$10,000.00	Family
9/17/2018	Tri-County Scholarship Fund 4 Century Drive 1st Floor Parsippany, New Jersey 07054	Program Support (in lieu of the 37th Annual Awards Dinner on October 22, 2018)	\$3,000.00	Education
9/17/2018	Loyola School 980 Park Avenue New York, New York 10028	2018 Staff Designated Gift, Program Support	\$1,000.00	Education
9/24/2018	Saint Labre Indian School P.O. Box 216 Ashland, Montana 59003	2018 Employee Matching Gift, Program Support	\$25.00	Education
9/24/2018	Sound Body Sound Mind 11100 Santa Monica Blvd Suite 1910 Los Angeles, California 90025	2018 Director's Designated Gift, Program Support	\$7,000.00	Others

WILLIAM E. SIMON FOUNDATION				
EIN: 13-6211778				
2018 FORM 990-PF				
Payment Date	Payee Organization	Request Project Title	Amount	Program Area
10/1/2018	Partnership for Inner-City Education 1011 First Avenue 18th Floor New York, New York 10022	Pledge - Challenge grant for support of Bronx schools in the 2017-18 school year	\$20,000.00	Education
10/1/2018	Mayo Performing Arts Center 100 South Street Morristown, New Jersey 07960	2018 Director's Designated Gift, Program Support	\$2,500.00	Education
10/1/2018	UCLA Foundation 10920 Wilshire Blvd, 11th Floor Los Angeles, California 90024	Pledge - Support for the Value Investing Program in the 2017-18 and 2018-19 school years	\$20,000.00	Education
10/1/2018	Preschool Advantage 25 Lindsley Drive Suite 307 Morristown, New Jersey 07960	2018 Director's Designated Gift, Program Support	\$2,500.00	Education
10/8/2018	New City Kids 240 Fairmount Avenue Jersey City, New Jersey 07306	Pledge - Challenge Grant for capital project	\$70,140.00	Faith
10/8/2018	Sound Body Sound Mind 11100 Santa Monica Blvd Suite 1910 Los Angeles, California 90025	2018 Employee Matching Gift, Program Support	\$150.00	Others
10/8/2018	LAMP Ministries 2704 Schurz Avenue Bronx, New York 10465-3173	Program Support, in memory of Lyn Scheuring	\$500.00	Faith
10/12/2018	Good Grief 38 Elm Street Morristown, New Jersey 07960	2018 Director's Designated Gift, Program Support	\$5,000.00	Family
10/12/2018	South Bronx United 594 Grand Concourse, Suite 2 Bronx, New York 10451	Pledge - Challenge grant for Program Support	\$10,000.00	Family
10/12/2018	Institute on Religion and Public Life 35 East 21st Street 6th Floor New York, New York 10010	Program Support, including the journal First Things	\$40,000.00	Faith
10/12/2018	Federalist Society for Law & Public Policy Studies 1776 I Street NW Suite # 300 Washington, District of Columbia 20006	William E. Simon Lectures in Law Series discussing religion in the public square in the 2018-19 school year	\$35,000.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
10/12/2018	Intercollegiate Studies Institute 3901 Centerville Road Wilmington, Delaware 19807-1431	Support for the William E. Simon Lecture Series on Religion and Public Life in the 2018-19 school year	\$25,000.00	Faith
10/12/2018	National Right to Work Legal Defense Foundation 8001 Braddock Road Springfield, Virginia 22160	Charter School Legal Defense Program	\$15,000.00	Education
10/12/2018	Pohatcong Township PTA 240 Route 519 Phillipsburg, New Jersey 08865	2018 Staff Designated Gift, Program Support	\$1,000.00	Education
10/12/2018	Garden State Initiative P O. Box 9180 Morristown, New Jersey 07963	Program Support	\$25,000.00	Others
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$25.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$25.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$50.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$50.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$25.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$100.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$50.00	Family

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Fit, Program Support	\$400.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$50.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$50.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$50.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$25.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$25.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$25.00	Family
10/12/2018	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	2018 Employee Matching Gift, Program Support	\$100.00	Family
10/12/2018	Morris Arts 14 Maple Avenue, Suite 301 Morristown, New Jersey 07960	Support for the "Girls Surviving" mentoring program in the 2018-19 school year (outright)	\$4,000.00	Family
10/12/2018	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2018 Director's Designated Gift, Women's Health Philanthropy Council, Behavioral Health Program	\$12,000.00	Others
10/23/2018	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2018 Director's Designated Gift, Cancer Center	\$10,000.00	Others

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
10/23/2018	Mayo Performing Arts Center 100 South Street Morristown, New Jersey 07960	2018 Director's Designated Gift, Program Support (in lieu of the 20th Annual Starlight Ball on November 16, 2018)	\$1,000.00	Education
10/23/2018	Boy Scouts of America Greater New York Councils The Empire State Building 350 Fifth Avenue Suite 7820 New York, New York 10118-0199	Support for the traditional troops in the South Bronx	\$5,000.00	Family
10/23/2018	Sovereign Military Order of Malta Western Association 610 16th Street, Suite 410 Oakland, California 94612	2018 Director's Designated Gift, Annual Appeal	\$5,000.00	Faith
10/23/2018	Women for Women International 2000 M Street, NW Suite 200 Washington, District of Columbia 20036	2018 Director's Designated Gift, Program Support	\$5,000.00	Others
10/23/2018	Future Five 135 Atlantic Street Stamford, Connecticut 06901	2018 Director's Designated Gift, Program Support	\$5,000.00	Family
10/23/2018	Good Grief 38 Elm Street Morristown, New Jersey 07960	2018 Director's Designated Gift, "Fund a Need"	\$10,000.00	Family
10/30/2018	Good Grief 38 Elm Street Morristown, New Jersey 07960	2018 Director's Designated Gift, Program Support	\$9,000.00	Family
10/30/2018	Deerfield Academy 7 Boyden Lane PO Box 87 Deerfield, Massachusetts 01342	2018 Director Designated Gift, Annual Fund	\$50,000.00	Education
10/30/2018	Sisters of Saint Joseph of Springfield 34 Lower Westfield Road Holyoke, Massachusetts 01040	2018 Staff Designated Gift, Program Support	\$500.00	Faith
10/30/2018	University of Southern California Sol Price School of Public Policy 650 Childs Way, RGL 312 Los Angeles, California 90089-0626	2018 Director's Designated Gift, Support for the Center on Philanthropy and Public Policy	\$10,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
10/30/2018	DREAM 333 East 100th Street New York, New York 10029	Program Support for South Bronx site in the 2018-19 school year	\$5,000.00	Family
10/30/2018	UMS-Wright Preparatory School 65 Mobile Street Mobile, Alabama 36607	2018 Staff Designated Gift, Program Support	\$500.00	Education
10/30/2018	Gunston Hall 10709 Gunston Road Mason Neck, Virginia 22079	2018 Staff Designated Gift, Program Support	\$500.00	Others
10/30/2018	City Gardens Club of New York City 755 Park Avenue New York, New York 10021	2018 Staff Designated Gift, Program Support	\$500.00	Others
10/30/2018	Greenwich Hospital Association 5 Perryridge Road Greenwich, Connecticut 06830-4697	2018 Director's Designated Gift, Program Support	\$5,000.00	Others
10/30/2018	Thomas B. Fordham Institute 1016 16th Street, NW 8th Floor Washington, District of Columbia 20036	Program Support (as a token of our appreciation for Robert Pondiscio speaking at our Board meeting)	\$2,500.00	Education
10/30/2018	Madison Square Boys and Girls Club 733 Third Avenue Floor 2 New York, New York 10017	2018 Director's Designated Gift, Annual Support	\$35,000.00	Family
10/30/2018	Dominican Academy 44 East 68th Street New York, New York 10021	2018 Staff Designated Gift, Program Support	\$500.00	Education
10/30/2018	Greenwich Country Day School P.O. Box 623 Greenwich, Connecticut 06836	2018 Director's Designated Gift, Headmaster's Discretionary Fund	\$10,000.00	Education
10/30/2018	Fordham University Rose Hill Campus Bronx, New York 10458	2018 Staff Designated Gift, Program Support	\$500.00	Education
10/30/2018	Steven McDonald Memorial Corporation P O Box 282 Malverne, New York 11565	2018 Staff Designated Gift, Program Support	\$1,000.00	Others

WILLIAM E SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
11/5/2018	Catholic Education Partners Sagamore Institute 2902 N. Meridian Street Indianapolis, Indiana 46208	Pledge - Challenge grant for program support	\$10,000.00	Education
11/5/2018	Blair Academy 2 Park Street P O Box 600 Blairstown, New Jersey 07825	2018 Director's Designated Gift, Financial Aid	\$15,000.00	Education
11/5/2018	University of Vermont Grasse Mount 411 Main Street Burlington, Vermont 05401-3470	2018 Director's Designated Gift, Events Center	\$20,000.00	Education
11/12/2018	All Hallows High School 111 East 164th Street Bronx, New York 10452	Pledge - Tuition Assistance for ten students in the 2018-19 and 2019-20 school years	\$20,000.00	Education\Scholarship / Tuition Asst.
11/12/2018	Parents Television Council 707 Wilshire Boulevard Suite 2075 Los Angeles, California 90017	Support for their media research	\$30,000.00	Family
11/12/2018	New City Kids 240 Fairmount Avenue Jersey City, New Jersey 07306	General Operating Support for Jersey City in 2018-19 (outright)	\$65,000.00	Family
11/12/2018	Good Grief 38 Elm Street Morristown, New Jersey 07960	Program Support for Morristown (outright)	\$30,000.00	Family
11/12/2018	Good Grief 38 Elm Street Morristown, New Jersey 07960	Program Support for Jersey City	\$35,000.00	Family
11/12/2018	EdChoice 111 Monument Circle Suite 2650 Indianapolis, Indiana 46250	Support for Research Program	\$5,000.00	Education
11/20/2018	Memories Live Foundation 55 Union Place, Box 164 Summit, New Jersey 07901	Support for Morristown Project	\$5,000.00	Others
11/20/2018	Elon University Johnston Hall 213 2300 Campus Box Elon, North Carolina 27244	2018 Director's Designated Gift, Program Support	\$5,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
11/20/2018	Bound for College 1730 S. Federal Highway #297 Delray Beach, Florida 33483	Staff Designated Gift, Program Support	\$500 00	Family
11/20/2018	Friends of Learning Community Charter School 2495 Kennedy Boulevard Jersey City, New Jersey 07304	Pledge - Challenge grant to support Middle School intervention program in reading and math	\$10,000 00	Education
11/20/2018	Charter School Growth Fund 10901 W. 120th Ave Suite 450 Broomfield, Colorado 80021	Fund III support to grow high quality charter networks in New York	\$175,000.00	Education
11/20/2018	Luther College 700 College Drive Decorah, Iowa 52101	Staff Designated Gift, Program Support	\$500.00	Education
11/20/2018	Summer Search 90 Broad Street Suite 701 New York, New York 10004	2018 Director's Designated Gift, Program Support for Summer Search North Bay	\$5,000 00	Family
11/20/2018	Saint Peter's University 2641 Kennedy Blvd. Jersey City, New Jersey 07306	Pledge - Challenge grant to support Campus Ministry kitchen renovations	\$10,000 00	Faith
11/26/2018	Pacific Research Institute for Public Policy 101 Montgomery Street Suite 1300 San Francisco, California 94104	Support for Education Research	\$50,000 00	Education
11/26/2018	New City Kids 240 Fairmount Avenue Jersey City, New Jersey 07306	Pledge - Challenge Grant for capital project	\$92,047 00	Faith
11/26/2018	Rocking the Boat 812 Edgewater Road Bronx, New York 10474	Job Skills Program (outright)	\$10,000.00	Family
12/10/2018	JerseyCAN 11 Commerce Drive, Suite 310 Cranford, New Jersey 07016	Program Support (outright)	\$5,000 00	Education
12/10/2018	JerseyCAN 11 Commerce Drive, Suite 310 Cranford, New Jersey 07016	Pledge - Challenge grant for Program Support	\$5,000.00	Education

WILLIAM E SIMON FOUNDATION

EIN 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
12/10/2018	Dollies Making A Difference 440 Toyopa Drive Pacific Palisades, California 90272	2018 Director's Designated Gift, Program Support	\$2,500.00	Others
12/10/2018	Spring Street Community Development Corp 65 Spring St. Morristown, New Jersey 07960	Program Support (outright)	\$5,000.00	Family
12/10/2018	Jersey Battered Women's Services P O. Box 1437 Morristown, New Jersey 07962	Support for the Carol G Simon House and general support in honor of the 2018 MQS Charitable Golf Outing	\$25,000.00	Family
12/10/2018	Indiana University P O. Box 500 Bloomington, Indiana 47402	2018 Director's Designated Gift, Dean's Council Fund at the School of Public and Environmental Affairs	\$15,000.00	Education
12/10/2018	American Cancer Society 7 Ridgedale Avenue, Suite 103 Cedar Knolls, New Jersey 07927	Program Support (in lieu of the Starry Night Gala on May 18, 2019 - Peter declined being the honoree)	\$5,000.00	Others
12/10/2018	Foundation for Excellence in Education P.O. Box 10691 Tallahassee, Florida 32302	Program Support	\$20,000.00	Education
12/10/2018	Friends of the Children New York P O. Box 1649 New York, New York 10026	Support for programs in the South Bronx in the 2018-19 school year (outright)	\$10,000.00	Family
12/10/2018	Hyde Leadership Charter School 730 Bryant Avenue Bronx, New York 10474	Support for the College Counseling and Post-Secondary Success Program in the 2018-19 school year	\$7,500.00	Education
12/10/2018	LAMP Ministries 2704 Schurz Avenue Bronx, New York 10465-3173	Support for missionary work in the South Bronx (outright)	\$6,500.00	Faith
12/10/2018	BlinkNow Foundation P O Box 453 Mendham, New Jersey 07945	2018 Staff Designated Gift, Program Support	\$500.00	Others

WILLIAM E. SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
12/10/2018	Hunts Point Alliance for Children P O. Box 740190 Bronx, New York 10474	Program Support in the 2018-19 school year (outright)	\$50,000.00	Family
12/10/2018	Family Life Academy Charter School 296 East 140th Street Bronx, New York 10454	Wellness program in the 2018-19 school year (outright)	\$10,000.00	Family
12/10/2018	Grace Church Van Vorst 39 Erie Street Jersey City, New Jersey 07302	Pledge - Challenge grant for support of the OIKOS Family Programs	\$15,000.00	Faith
12/10/2018	Women for Women International 2000 M Street, NW Suite 200 Washington, District of Columbia 20036	Program Support	\$20,000.00	Others
12/10/2018	Gladney Center for Adoption 6300 John Ryan Drive Fort Worth, Texas 76132-4122	Program Support	\$7,500.00	Family
12/10/2018	Civic Builders 304 Hudson Street, 3rd Floor New York, New York 10013	Program Support for South Bronx Classical Charter School IV (outright)	\$125,000.00	Education
12/10/2018	Saint Vincent de Paul Society - San Rafael 820 B Street PO Box 150527 San Rafael, California 94915	2018 Director's Designated Gift, Vincentian Desk	\$15,000.00	Faith
12/10/2018	P.G. Chambers School 15 Halko Drive Cedar Knolls, New Jersey 07927	2018 Director's Designated Gift, Program Support	\$2,500.00	Education
12/10/2018	Saint Peter's Episcopal Church 70 Maple Avenue Morristown, New Jersey 07960	Pledge - Challenge grant for bilingual summer camp in 2018	\$10,000.00	Family
12/10/2018	Saint Peter's Episcopal Church 70 Maple Avenue Morristown, New Jersey 07960	2018 Director's Designated Gift, Program Support	\$2,500.00	Faith
12/10/2018	Villanova University Development Office 800 Lancaster Avenue Villanova, Pennsylvania 19085-1673	2018 Staff Designated Gift, Program Support	\$2,500.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
12/10/2018	Community Soup Kitchen 36 South Street Morristown, New Jersey 07960	2018 Director's Designated Gift, Program Support	\$4,833.00	Others
12/10/2018	US Squash 555 Eighth Avenue, Suite 1102 New York, New York 10018	2018 Director's Designated Gift, Program Support	\$10,000.00	Others
12/10/2018	Mercy Center 377 East 145th Street Bronx, New York 10454	Program Support (outright)	\$20,000.00	Family
12/10/2018	Boston College More Hall 140 Commonwealth Avenue Chestnut Hill, Massachusetts 02167-3819	2018 Director's Designated Gift, Annual Fund	\$10,000.00	Education
12/10/2018	YMCA of Greater New York 2 Castle Hill Road Bronx, New York 10473	Family Support Workshops in the South Bronx in 2019	\$7,500.00	Family
12/10/2018	Student Sponsor Partners 424 Madison Avenue, Ste. 1002 New York, New York 10017	Pledge - Program support for South Bronx students attending South Bronx schools in 2017-18 and 2018-19	\$75,000.00	Education\Scholarship / Tuition Asst.
12/10/2018	Big Brothers Big Sisters of New York City 40 Rector Street 11th Floor New York, New York 10006	Program Support for the South Bronx (outright)	\$25,000.00	Family
12/10/2018	UCLA Foundation 10920 Wilshire Blvd, 11th Floor Los Angeles, California 90024	2018 Director's Designated Gifts, David Geffen School of Medicine	\$10,000.00	Education
12/10/2018	South Bronx Educational Foundation Inc 843 Crotona Park North Bronx, New York 10460	Program Support	\$25,000.00	Family
12/10/2018	Philanthropy Roundtable 1120 20th Street NW Suite 550 South Washington, District of Columbia 20036	Membership Renewal - Program Support	\$10,000.00	Others

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
12/10/2018	Philanthropy Roundtable 1120 20th Street NW Suite 550 South Washington, District of Columbia 20036	Catholic Schools Working Group	\$10,000.00	Education
12/10/2018	Philanthropy Roundtable 1120 20th Street NW Suite 550 South Washington, District of Columbia 20036	Program Support in thanks for Karl Zinsmeister speaking at the Jersey City Forum	\$5,000.00	Others
12/10/2018	Blacks in Law Enforcement Servicing the Community 155 Woodlawn Avenue Jersey City, New Jersey 07305	Program Support (outright)	\$7,500.00	Family
12/10/2018	Morris Educational Foundation P O Box 1224 Morristown, New Jersey 07962-1224	Program Support (in lieu of the Morristown ONSTAGE event on February 27, 2019)	\$300.00	Education
12/10/2018	National Council for Adoption 225 North Washington Street Alexandria, Virginia 22314-2520	Program Support (outright)	\$40,000.00	Family
12/10/2018	Archdiocese of Newark 171 Clifton Avenue P O Box 9500 Newark, New Jersey 07104-9500	Individualized assessment and blended learning pilot at nine schools in the 2018-19 school year	\$50,000.00	Education
12/10/2018	Homeless Solutions, Inc 3 Wing Drive, Suite 245 Cedar Knolls, New Jersey 07927	2018 Director's Designated Gift, Program Support	\$2,500.00	Others
12/10/2018	Heridas Pero No Vencidas, Inc 808 E Tremont Ave Bronx, NY 10460	Program Support	\$5,000.00	Religion
12/10/2018	Becket Fund 1200 New Hampshire Ave NW STE 700 Washington, DC 20036	Program Support	\$20,000.00	Education
12/11/2018	Civic Builders 304 Hudson Street, 3rd Floor New York, New York 10013	Program Support	\$50,000.00	Education

WILLIAM E SIMON FOUNDATION

EIN 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
12/17/2018	Girls Educational and Mentoring Services, Inc 201 West 148th Street, Ground Fl. New York, New York 10039	2018 Staff Designated Gift, Program Support	\$500.00	Family
12/17/2018	Adaptive Sports Foundation, Inc. c/o Windham Mountain CD Lane Road Windham, New York 12496	2018 Staff Designated Gift, Program Support	\$500.00	Others
12/17/2018	Fellowship of Catholic University Students, Inc P O Box 18710 Golden, Colorado 80402	2018 Staff Designated Gift, Program Support	\$500.00	Faith
12/17/2018	Grace Church Van Vorst 39 Erie Street Jersey City, New Jersey 07302	Support of the OIKOS family programs (outright)	\$15,000.00	Faith
12/17/2018	National Review Institute 19 W 44th Street Suite 1701 New York, New York 10036	2018 Staff Designated Gift, Program Support	\$1,000.00	Faith
12/17/2018	National Review Institute 19 W 44th Street Suite 1701 New York, New York 10036	2018 Staff Designated Gift, Program Support	\$500.00	Faith
12/17/2018	New City Kids 240 Fairmount Avenue Jersey City, New Jersey 07306	2018 Staff Designated Gift, Program Support	\$500.00	Family
12/17/2018	New City Kids 240 Fairmount Avenue Jersey City, New Jersey 07306	2018 Staff Designated Gift, Program Support	\$500.00	Family
12/17/2018	Part of the Solution 2759 Webster Avenue Bronx, New York 10458- 3708	2018 Staff Designated Gift, Program Support	\$1,000.00	Others
12/17/2018	Sovereign Military Order of Malta Western Association 610 16th Street, Suite 410 Oakland, California 94612	2018 Director's Designated Gift, Annual Appeal	\$5,000.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
12/17/2018	Gilder Lehrman Institute of American History 49 West 45th Street 6th Floor New York, New York 10036	2018 Staff Designated Gift, Program Support	\$1,000.00	Education
12/17/2018	South Bronx Educational Foundation Inc. 843 Crotona Park North Bronx, New York 10460	2018 Staff Designated Gift, Program Support	\$750.00	Family
12/17/2018	Providence College Providence, Rhode Island 02918-0001	2018 Staff Designated Gift, Angel Fund	\$2,000.00	Education
12/17/2018	Mercy Center 377 East 145th Street Bronx, New York 10454	2018 Staff Designated Gift, Program Support	\$500.00	Family
12/17/2018	Loyola School 980 Park Avenue New York, New York 10028	2018 Employee Matching Gift, Program Support	\$150.00	Education
12/17/2018	Capital Research Center 1513 16th Street N W. Washington, District of Columbia 20036-1401	Support for "Philanthropy Daily" website	\$5,000.00	Others
12/17/2018	P G. Chambers School 15 Halko Drive Cedar Knolls, New Jersey 07927	Program Support	\$1,000.00	Education
12/17/2018	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	2018 Staff Designated Gift, Program Support	\$500.00	Family
12/17/2018	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	2018 Staff Designated Gift, Program Support	\$1,000.00	Family
12/17/2018	Saint Nicholas School 118 Ferry Street Jersey City, New Jersey 07307	Pledge - Challenge Grant for support for a Guided Reading project in the 2017-18 school year	\$1,615.00	Education
12/17/2018	LAMP Ministries 2704 Schurz Avenue Bronx, New York 10465-3173	2018 Staff Designated Gift, Program Support	\$500.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN. 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
12/17/2018	Roots and Wings Foundation 75 Bloomfield Avenue Suite 303 Denville, New Jersey 07834	2018 Staff Designated Gift, Program Support	\$1,000 00	Family
12/17/2018	Collegiate Cultural Foundation 218 West State Street Media, Pennsylvania 19063	2018 Staff Designated Gift, Love and Fidelity Network	\$750 00	Family
12/17/2018	Future Five 135 Atlantic Street Stamford, Connecticut 06901	2018 Staff Designated Gift, Program Support	\$1,000 00	Family
12/17/2018	Pivot Ministries 485 Jane Street Bridgeport, Connecticut 06608	Program Support	\$5,000 00	Faith
12/17/2018	Mendham Borough Library 10 Hilltop Road Mendham, New Jersey 07945	2018 Staff Designated Gift, Program Support	\$500 00	Others
12/17/2018	Rocking the Boat 812 Edgewater Road Bronx, New York 10474	2018 Staff Designated Gift, Program Support	\$1,000 00	Family
12/17/2018	Tudor City Greens 5 Tudor City Place Box #1-E New York, New York 10017	2018 Staff Designated Gift, Program Support	\$500 00	Others
12/17/2018	Make-A-Wish Foundation of New Jersey 1347 Perrineville Road Monroe Township, New Jersey 08831	2018 Staff Designated Gift, Program Support	\$500 00	Others
12/17/2018	Church of the Epiphany 239 East 21st Street New York, New York 10010	2018 Staff Designated Gift, Program Support	\$500 00	Faith
12/17/2018	Heridas Pero No Vencidas 514 E 163rd Street, 7B Bronx, New York 10451	2018 Staff Designated Gift, Program Support	\$1,000.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
12/17/2018	Community Pediatric Programs of Montefiore Medical Center 853 Longwood Avenue Suite 201 Bronx, New York 10459	Support for the Healthy Pregnancy and Well Baby Group Care Program in the South Bronx (outright)	\$5,000.00	Family
12/17/2018	Brooklyn Boatworks 68 Jay Street, Suite 601A Brooklyn, New York 11201	2018 Staff Designated Gift, Program Support	\$1,000.00	Others
12/17/2018	Birthright of Greater Norwalk 71 East Avenue, Suite E Norwalk, Connecticut 06851	2018 Staff Designated Gift, Program Support	\$500.00	Family
12/17/2018	SoundWaters 1281 Cove Road Stamford, Connecticut 06902	2018 Staff Designated Gift, Program Support	\$1,000.00	Education
12/26/2018	Homeless Solutions, Inc. 3 Wing Drive, Suite 245 Cedar Knolls, New Jersey 07927	Pledge - Challenge grant for program support	\$10,000.00	Others
12/26/2018	Hill House 10 Riverside Avenue Riverside, Connecticut 06878	2018 Employee Matching Gift, Program Support	\$125.00	Others
12/26/2018	Friends of the Children New York P.O. Box 1649 New York, New York 10026	2018 Employee Matching Gift, Program Support	\$125.00	Family
12/26/2018	Saint Joseph's Indian School 1301 North Main Street Chamberlain, South Dakota 57326	2018 Employee Matching Gift, Program Support	\$50.00	Education
12/31/2018	Boy Scouts of America Patriots' Path Council 1 Saddle Rd Cedar Knolls, New Jersey 07927	2018 Staff Designated Gift, Program Support	\$500.00	Family
12/31/2018	Parish Catalyst 11100 Santa Monica Blvd Suite 1910 Los Angeles, California 90025	2018 Staff Designated Gift, Program Support	\$1,000.00	Faith

WILLIAM E SIMON FOUNDATION

EIN: 13-6211778

2018 FORM 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
12/31/2018	Dollies Making A Difference 440 Toyopa Drive Pacific Palisades, California 90272	2018 Staff Designated Gift, Program Support	\$500 00	Others
			\$6,837,275.00	

STATEMENT 13

William E. Simon Foundation
EIN 13-6217788
Grants Payable
12/31/2018

	<u>Totals</u>
All Hallows High School	20,000
Assumption College for Sisters	20,000
Children's Scholarship Fund	243,125
Community Foundation of New Jersey	74,499
Foundation for Morristown Medical Center	1,000,000
Parish Catalyst	250,000
Philanthropy Roundtable	270,000
Richard Nixon Foundation	250,000
Sound Body Sound Mind	100,000
Tri-County Scholarship Fund	<u>10,000</u>
Subtotal	2,237,624
Discounted Payable	<u>(41,281)</u>
Total Grants Payable	<u><u>2,196,343</u></u>

WILLIAM E SIMON FOUNDATION

EIN 13-6217788

PART VIII, LINE 1

(A) NAME AND ADDRESS	(B) TITLE AND AVG HOURS WORKED PER WEEK	(C) CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	(D) EXPENSE ACCT OTHER ALLOWANCES	(E) COMPENSATION
J PETER SIMON C/O MASSEY QUICK SIMON & CO , LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR/ CO-CHAIRMAN AS REQUIRED	0	0	0
WILLIAM E SIMON, JR C/O MASSEY QUICK SIMON & CO , LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR/ CO-CHAIRMAN/ ASST SECRETARY AS REQUIRED	0	0	0
MARY B SIMON STREEP C/O MASSEY QUICK SIMON & CO , LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR AS REQUIRED	0	0	0
CAROL LEIGH SIMON PORGES C/O MASSEY QUICK SIMON & CO , LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	VICE PRESIDENT/ TREASURER DIRECTOR AS REQUIRED	0	0	0
AIMEE SIMON BLOOM C/O MASSEY QUICK SIMON & CO , LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	VICE PRESIDENT/ SECRETARY DIRECTOR AS REQUIRED	0	0	0
JULIE SIMON MUNRO C/O MASSEY QUICK SIMON & CO , LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR AS REQUIRED	0	0	0
JOHANNA K SIMON C/O MASSEY QUICK SIMON & CO , LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR AS REQUIRED	0	0	0
DANIEL MOSLEY C/O MASSEY QUICK SIMON & CO , LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR AS REQUIRED	0	0	0
JAMES PIERESON C/O MASSEY QUICK SIMON & CO , LLC 140 E 45TH STREET NEW YORK, NY 10017	PRESIDENT/ DIRECTOR 40 HOURS	49,895	0	242,000
WILLIAM WACHENFELD C/O MASSEY QUICK SIMON & CO , LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR AS REQUIRED	0	0	0
MICHAEL OLIVERI C/O MASSEY QUICK SIMON & CO , LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	ASSISTANT TREASURER AS REQUIRED	0	0	0
TOTAL		\$ 49,895	\$ -	\$ 242,000

WILLIAM E SIMON FOUNDATION

EIN: 13-6217788

PART VIII, LINE 2 (A) NAME AND ADDRESS	(B) TITLE AND AVG HOURS WORKED PER WEEK	(C) CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	(D) EXPENSE ACCT OTHER ALLOWANCES	(E) COMPENSATION
SARA SNIDER C/O WILLIAM E SIMON FOUNDATION 140 E. 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 38,983	\$ -	\$ 183,327
AMY ALLRED C/O WILLIAM E SIMON FOUNDATION 140 E. 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 31,173	\$ -	\$ 100,279
KAREN PARLOCK C/O WILLIAM E SIMON FOUNDATION 140 E. 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 26,509	\$ -	\$ 100,226
JANICE RIDDELL C/O WILLIAM E. SIMON FOUNDATION 140 E. 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 14,558	\$ -	\$ 140,000
TOTAL		\$ 111,223	\$ -	\$ 523,832