

Form 990-PF

Department of the Treasury Internal Revenue Service

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

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



"	or o	calendar year 2018 or tax year beginning		, 2018, and endin	ng , 20			
١	Vame	of foundation CARYL H. AND BERNARI	O M. SUSMAN FAM	ILY	A Employer identification number			
	FO	UNDATION			20-8068788			
1	Numb	er and street (or P O box number if mail is not delivered to	B Telephone number (see instructions)					
_		UNDATION SOURCE 501 SILVERSIDE			(800) 839-1754			
(City o	r town, state or province, country, and ZIP or foreign posta	Il code					
	WI	LMINGTON, DE 19809-1377			C If exemption application is pending, check here.			
ō	G Ch	neck all that apply Initial return	Initial return o	of a former public charit	N D 4 5			
		Final return	Amended ret	•	D 1 Foreign organizations, check here			
		Address change	X Name change		85% test, check here and attach			
í i	1 Ch	neck type of organization X Section 501(computation			
1	$\overline{}$	Section 4947(a)(1) nonexempt charitable trust	Other taxable pri	17 7	E If private foundation status was terminated under section 507(b)(1)(A), check here			
ī			unting method X Ca		F If the foundation is in a 60-month termination			
	en		ther (specify)		under section 507(b)(1)(B), check here			
		1 330 000	column (d) must be on ca	sh basis)				
	Part	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income (d) Disbursements for charitable purposes (cost) house state (cost)			
-	Τ.	column (a) (see instructions))			(cash basis only)			
	1	Contributions, gifts, grants, etc., received (attach schedule) Check X if the foundation is not required to		-				
	2	attach Sch B	416.	416.				
	3	Interest on savings and temporary cash investments.	32,190.	32,190.	DEDENTED.			
	4	Dividends and interest from securities	32,130.	32,130.	- REGEIVED			
	5	7) / 4			श्र			
a	1	Net rental income or (loss)	168,220.		MAY 1 4 2019 S			
Ì	0	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all 984,544	100,2201		<u> </u>			
Revenue	,	assets on line ba	·· -	334,968.	- - - - - - - - - - - - - -			
8	7 8	Capital gain net income (from Part IV, line 2)		331,300.	- I OGDEN. UT I			
	9	Net short-term capital gain						
		and allowances						
	t	D Less Cost of goods sold .						
		Gross profit or (loss) (attach schedule)						
	11	Other income (attach schedule)						
_	12	Total Add lines 1 through 11	200,826.	367,574.				
J	13	Compensation of officers, directors, trustees, etc	0.					
يوم	14	Other employee salaries and wages						
とが、	15	Pension plans, employee benefits		-				
	16 a	Legal fees (attach schedule)	<u>_</u>					
	' b	Accounting fees (attach schedule)						
Š	C	Other professional fees (attach schedule)						
₽	17	Interest						
2019 Inistrative	18	Taxes (attach schedule) (see instructions)[1].	7,972.					
-	19	Depreciation (attach schedule) and depletion.						
> ₹	20	Occupancy						
ַבַ כ	21	Travel, conferences, and meetings						
AUG WI	22	Printing and publications	10 075		10.035			
_	23 24 25	Other expenses (attach schedule) ATCH .2 .	12,875.		12,875			
SCANNED Operati	24	Total operating and administrative expenses.	20 047		10.075			
		Add lines 13 through 23	20,847.		12,875			
z o		Contributions, gifts, grants paid	83,650.		83,650			
ර -	26	Total expenses and disbursements Add lines 24 and 25	104,497.		96,525			
Ō	27	Subtract line 26 from line 12	06 330					
	l	Excess of revenue over expenses and disbursements	96,329.	367 574				
	J	Net investment income (if negative, enter -0-)		367,574.				
-		Adjusted net income (if negative, enter -0-).			- 000 DE			
JSA F6 8E1410		perwork Reduction Act Notice, see instructions.			Form 990-PF (2018)			

Part I		Attached schedules and amounts in the description column should be for end-of-year	Beginning of year		End of	f year
_	arti	amounts only (See instructions)	(a) Book Value	(b) Book Value	;	(c) Fair Market Value
	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments	54,356.	10,	812.	10,812
	3	Accounts receivable >				
		Less allowance for doubtful accounts ▶				
	4	Pledges receivable ▶	·			
		Less allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other				
	ł	disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule)				-
		Less allowance for doubtful accounts ▶			ł	
ţ	8	Inventories for sale or use				
Assets	9	Prepaid expenses and deferred charges				
ĕ	10a	Investments - U S and state government obligations (attach schedule),				
		Investments - corporate stock (attach schedule) ATCH 3	1,877,858.	2,017,	731.	1,760,092
		Investments - corporate bonds (attach schedule)				
	11	Investments - land, buildings, and equipment basis Less accumulated depreciation				
	12	(attach schedule) Investments - mortgage loans				
	13	Investments - other (attach schedule)				
	14	Land, buildings, and equipment basis				
		Less accumulated depreciation				
	15	(attach schedule) Other assets (describe ▶			$\neg \dagger$	
		Total assets (to be completed by all filers - see the				* ·
		instructions Also, see page 1, item l)	1,932,214.	2,028,	543.	1,770,904
_	17	Accounts payable and accrued expenses		· · · · · · · · · · · · · · · · · · ·		
	18	Grants payable		•		
Ś		Deferred revenue		****		
ij	20	Loans from officers, directors, trustees, and other disqualified persons.			$\neg \uparrow$	
<u>=</u>	21	Mortgages and other notes payable (attach schedule)				
Liabilities	22	Other liabilities (describe ►			\neg	
		,			\neg	-
	23	Total liabilities (add lines 17 through 22)	0.		0.	
_		Foundations that follow SFAS 117, check here				
es		and complete lines 24 through 26, and lines 30 and 31.				
ဦ	24	Unrestricted			1	
텰	24				-	
ä	26	Temporarily restricted				
밀	20	Foundations that do not follow SFAS 117, check here			\rightarrow	
교		and complete lines 27 through 31.				
ō	27 28 29 30 31					
ţ	27	Capital stock, trust principal, or current funds			\rightarrow	 -
Se	20	Paid-in or capital surplus, or land, bldg , and equipment fund	1,932,214.	2,028,5	543	
As	29	Retained earnings, accumulated income, endowment, or other funds	1,932,214.	2,028,5		· · · · · · · · · · · · · · · · · · ·
<u>ĕ</u>	30	Total net assets or fund balances (see instructions)	1,332,214.	2,020,5	713.	
Z	3		1,932,214.	2,028,5	5/13	
	ort II	Analysis of Changes in Not Assets or Fund Pole		2,020,0	743.	
_		Analysis of Changes in Net Assets or Fund Balan		aust agree with	Т	
1		al net assets or fund balances at beginning of year - Part I		_		1,932,214
_		of-year figure reported on prior year's return)			1	96,329
		er amount from Part I, line 27a			2	
		er increases not included in line 2 (itemize)			3	2 020 542
		lines 1, 2, and 3	• • • • • • • • • • • • • • • • • • • •		4	2,028,543
		reases not included in line 2 (itemize)	h- 5) B (0) "	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	5	2 020 542
<u>6</u>	Lota	I net assets or fund balances at end of year (line 4 minus	iine 5) - Part II, column (b), line 30	_6	2,028,543

CARYL H. AND BERNARD M. SUSMAN FAMILY

Capital Gains and Losses for Tax on Investment Income

Part IV

(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)					(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 :	a SEE PART IV SCHE	DULE				
- 1	b <u> </u>					
	<u> </u>					
	d					
	e				<u> </u>	
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (los ((e) plus (f) minu	
	a					
	b		_			
	<u> </u>					
	Complete only for assets s	howing gain in column (h) and owned	by the foundation on 12/31/69			
	(i) FMV as of 12/31/69	(J) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (i), if any		Gains (Col. (h) ga (k), but not less th Losses (from col	nan -0-) or
			, , , , , , , , , , , , , , , , , , ,		•	
	3 D					_ ·
	<u>, </u>	***				
_						
2	Capital gain net income	or (net capital loss)	ain, also enter in Part I, line 7 oss), enter -0- in Part I, line 7	2		334,968.
3	Net short-term capital o	ain or (loss) as defined in sections	· · · · · · · · · · · · · · · · · · ·			334,300.
	If gain, also enter in P	art I, line 8, column (c) See ins	tructions If (loss), enter -0- in			0
D.		Index Costion 4040/s) for Do	duced Tax on Net Investment In	3		0.
			e section 4940(a) tax on net investr			
۷a		•	outable amount of any year in the ba	ase period	lo	Yes X No
1			ar, see the instructions before makii	ng any en	tries	
÷	(a)	(b)	(c)	ig any en	(d)	<u>_</u>
Ca	Base period years lendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	Net value of nonchantable-use assets		Distribution rat (col (b) divided by	
	2017	48,963.	1,813,870.		· · · · · · · · · · · · · · · · · · ·	0.026994
	2016	35,463.	1,444,034.		(0.024558
	2015	25,315.	1,390,085.			0.018211
	2014	53,535.	1,341,993.			0.039892
	2013	167,023.	1,280,955.		(0.130389
2	Total of line 1, column (d	d)		2		0.240044
3		o for the 5-year base period - divid				
	the number of years the	foundation has been in existence	If less than 5 years	3	- (0.048009
4	Enter the net value of no	oncharitable-use assets for 2018 for	rom Part X, line 5	4	1,9	935,021.
5	Multiply line 4 by line 3.			5		92,898.
6	Enter 1% of net investm	ent income (1% of Part I, line 27b)		6		3,676.
7				7		96,574.
				8		96,525.
8	If line 8 is equal to or g Part VI instructions	ions from Part XII, line 4 reater than line 7, check the box	ın Part VI, line 1b, and complete t		using a 1% tax	

Pai	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 494	8 - see	instru	uction	s)	
`1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1)					
	Date of ruling or determination letter (attach copy of letter if necessary - see instructions)					
ь	Domestic foundations that meet the section 4940(e) requirements in Part V, check			7,3	351.	
	here and enter 1% of Part I, line 27b					
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of J Part I, line 12, col (b)					
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)					
3	Add lines 1 and 2			7,3	351.	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)				0.	
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0			7,3	351.	
6	Credits/Payments					
а	2018 estimated tax payments and 2017 overpayment credited to 2018 6a 4,600.	}				
b	Exempt foreign organizations - tax withheld at source					
С	Tax paid with application for extension of time to file (Form 8868) 6c					
d	Backup withholding erroneously withheld					
7	Total credits and payments Add lines 6a through 6d			4,6	500.	
8	Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached			2 -		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed				51.	
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid					
11 Doc	Enter the amount of line 10 to be Credited to 2019 estimated tax ▶ Refunded ▶ 11					
	t VII-A Statements Regarding Activities					
та	During the tax year, did the foundation attempt to influence any national, state, or local legislation or		10	Yes	No X	
_	participate or intervene in any political campaign?		1a			
D	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? So	ee tne	1ь		Х	
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any m	otoriale	10			
	published or distributed by the foundation in connection with the activities	ateriais				
c	Did the foundation file Form 1120-POL for this year?		1c		Х	
	d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year					
	(1) On the foundation ▶ \$ (2) On foundation managers ▶ \$					
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax important	sed				
	on foundation managers \$			i		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		X	
	If "Yes," attach a detailed description of the activities					
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument,	articles				
	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3	Х		
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year 2		4a		X	
b	If "Yes," has it filed a tax return on Form 990-T for this year?		4b			
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		X	
	If "Yes," attach the statement required by General Instruction T					
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either					
	By language in the governing instrument, or					
	By state legislation that effectively amends the governing instrument so that no mandatory direction			v		
	conflict with the state law remain in the governing instrument?		6	X		
	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and P.	art XV	7	^		
	Enter the states to which the foundation reports or with which it is registered. See instructions.					
	DE,					
	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney (8b	x		
	(or designate) of each state as required by General Instruction G? If "No," attach explanation		60	43		
	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j) 4942(i)(5) for calendar year 2018, or the tay year beginning in 20182. See the instructions for Part XIV. If					
	4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV from lete Part XIV		9		$_{\rm X}$ L	
	complete Part XIV					
	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing		10		Х	
	names and addresses					

CARYL H. AND BERNARD M. SUSMAN FAMILY

Pai	rt VII-A Statements Regarding Activities (continued)			
			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
	meaning of section 512(b)(13)? If "Yes," attach schedule See instructions	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified			
	person had advisory privileges? If "Yes," attach statement. See instructions	12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► N/A			
14	The books are in care of ▶ FOUNDATION SOURCE Telephone no ▶ 800-839	-175	4	
	Located at ▶501 SILVERSIDE ROAD, SUITE 123 WILMINGTON, DE ZIP+4 ▶ 19809-1	377		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here		•	T
	and enter the amount of tax-exempt interest received or accrued during the year			
16	At any time during calendar year 2018, did the foundation have an interest in or a signature or other authorit		Yes	No
	over a bank, securities, or other financial account in a foreign country?	16		Х
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of			
	the foreign country			l I
Par	t 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
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No			1 1
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			-
	disqualified person?			1
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			1 1
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for			1 1
	the benefit or use of a disqualified person)?	1	1	1 1
	(6) Agree to pay money or property to a government official? (Exception Check "No" if the			1 1
	foundation agreed to make a grant to or to employ the official for a period after			1 1
	termination of government service, if terminating within 90 days)			1 1
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	1b		
	Organizations relying on a current notice regarding disaster assistance, check here			<u> </u>
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that			
	were not corrected before the first day of the tax year beginning in 2018?	1c		Х
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private			
	operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
а	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and			i 1
	6e, Part XIII) for tax year(s) beginning before 2018?			
	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)	2b		
C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			ļ
	>			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise		i	ļ
	at any time during the year?			
b	If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or			1
	disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the			
	Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of			,
	the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the			
	foundation had excess business holdings in 2018)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		Х
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its		[
	charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		X_

Par	t Üll-B	Statements Regarding Activities	for Which Form	4720 May Be Rec	uired (continu	ued)			
` 5a	During the	e year, did the foundation pay or incur any amo	ount to					Yes	No
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes X No								
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on,								
	directly or indirectly, any voter registration drive?								
		de a grant to an individual for travel, study, or o			1 1 1	X No			
		de a grant to an organization other than a							
	• •	on 4945(d)(4)(A)? See instructions				X No			
		de for any purpose other than religious, ch				_			
		ses, or for the prevention of cruelty to children				X No			
ь									
	-	ns section 53 4945 or in a current notice regar					5b		
		ions relying on a current notice regarding disas							
С	-	swer is "Yes" to question 5a(4), does the							
•		t maintained expenditure responsibility for the		•		No			
		ittach the statement required by Regulations se							
6a		oundation, during the year, receive any fun	• •	ectly, to pay premiur	ns				
••		onal benefit contract?	-			X No			
ь		undation, during the year, pay premiums, dire				•	6b		Х
-		o 6b, file Form 8870	ony or mandony, on o	. porosinar some					
7a		ne during the tax year, was the foundation a pa	arty to a prohibited ta	x shelter transaction?	Yes	X No			
ь		lid the foundation receive any proceeds or have					7b		
8		ndation subject to the section 4960 tax on pay	-						
•		tion or excess parachute payment(s) during the	` '		. Yes	X No			
Par	t VIII	Information About Officers, Director	s, Trustees, Fou	Indation Manager			es,		
		and Contractors ficers, directors, trustees, and foundati	on managara and	their compensation	Sac instruction	nc			
<u> </u>	LIST All OI		(b) Title, and average	(c) Compensation	(d) Contributions	to (a)	Expens	e accoi	ınt
		(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	employee benefit p and deferred comper	nans 'S	ther all		
ATC	I 4			0.		0.			0.
		ation of five highest-paid employees	(other than thos	e included on line	e 1 - see ins	tructions).	If no	ne,	enter
	"NONE."			-	(d) Contribution	s to			
(a)	Name and a	ddress of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	employee bene	efit (e)	Expens		
			devoted to position		plans and defen compensation				
	NONE								
	_					_			
<u> Total</u>	number o	f other employees paid over \$50,000		<u></u>		<u>. ▶ </u>	000		

3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "N	ONE "
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NONE	(0) 00
	0.
	
Total number of others receiving over \$50,000 for professional services	>
Part IX-A Summary of Direct Charitable Activities	· · · · · · · · · · · · · · · · · · ·
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number	of Expenses
organizations and other beneficianes served, conferences convened, research papers produced, etc	
1 N/A	_
2	
	_
	_
3	
	-
	_
4	
	-
	-
Part IX-B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
	_
	_
2	
	-
	-
All other program-related investments. See instructions	
3	
NONE	-
	-
Total Add lines 1 through 2	
Total. Add lines 1 through 3	>

Pa	Minimum Investment Return (All domestic foundations must complete this part. For see instructions.)	eign founda	tions,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
а	Average monthly fair market value of securities	1a	1,911,272.
	Average of monthly cash balances	• — —	53,216.
c			
d		1d	1,964,488.
	Reduction claimed for blockage or other factors reported on lines 1a and		
_	1c (attach detailed explanation)	- <u>,</u>	
2	Acquisition indebtedness applicable to line 1 assets		1,964,488.
3	Subtract line 2 from line 1d,		1, 904, 400.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see		29,467.
_	instructions)		1,935,021.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4		96,751.
6	Minimum investment return. Enter 5% of line 5		90,731.
Pa	and certain foreign organizations, check here and do not complete this part)	undations	
1	Minimum investment return from Part X, line 6	1 1	96,751.
-		` 	30/1011
	Tax of investment income for 2010 from Fart VI, line 5	+	
b	· · · · · · · · · · · · · · · · · · ·	- _{2c}	7,351.
C		•	89,400.
3 4	Distributable amount before adjustments Subtract line 2c from line 1	•	037.001
5	Add lines 3 and 4		89,400.
	Deduction from distributable amount (see instructions)	•	
6 7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII,		
•	line 1	1 1	89,400.
_		• •	
Pa	rt XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26		96,525.
b			
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc	1 1	
	purposes	. 2	
3	Amounts set aside for specific charitable projects that satisfy the		
а			
b	,		
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4		96,525.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income		•
	Enter 1% of Part I, line 27b See instructions		0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4		96,525.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when qualifies for the section 4940(e) reduction of tax in those years	calculating w	hether the foundation

Pa	art XIII Undistributed Income (see inst	ructions)			
1	Distributable amount for 2018 from Part XI,	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
•	line 7		·		89,400.
_					03/100.
	Undistributed income, if any, as of the end of 2018				
٠	Enter amount for 2017 only				
					
	Excess distributions carryover, if any, to 2018 From 2013 110, 232.				
	5 2011				
	From 2014	-			
	From 2015	-			
	1 From 2016	-			
	From 2017	110 222			
	Total of lines 3a through e	110,232.			
4	Qualifying distributions for 2018 from Part XII, line 4 > \$ 96,525.				
	Applied to 2017, but not more than line 2a				
r	Applied to undistributed income of prior years (Election required - see instructions)				
c	Treated as distributions out of corpus (Election required - see instructions)				
d	Applied to 2018 distributable amount			<u> </u>	89,400.
е	Remaining amount distributed out of corpus	7,125.			
5	Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))				
6	Enter the net total of each column as indicated below:				
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	117,357.			
ь	Prior years' undistributed income Subtract				
	line 4b from line 2b				
C	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d	Subtract line 6c from line 6b Taxable				
_	amount - see instructions				
е	Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount - see instructions				
f	Undistributed income for 2018 Subtract lines				
	4d and 5 from line 1 This amount must be				
	distributed in 2019				<u> </u>
7	Amounts treated as distributions out of corpus				
	to satisfy requirements imposed by section				
	170(b)(1)(F) or 4942(g)(3) (Election may be				
	required - see instructions)				
8	Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)	110,232.			
9	Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	7,125.			
o	Analysis of line 9				
	Excess from 2014				
	Excess from 2015				
	Excess from 2016				
	Excess from 2017			,	
	Excess from 2017			,	
	EA0000 HOIII 2010				L

Pa	rt XIV Private Op	erating Foundations	(see instructions a	nd Part VII-A, quest	ion 9)	NOT APPLICABLE
$\overline{}$	If the foundation has				•	
	foundation, and the ruling	-		· · · · · · · · · · · · · · · · · · ·	- 1	
ь	Check box to indicate v)(3) or 4942(J)(5)
	Enter the lesser of the ad-	Tax year		Prior 3 years		
	justed net income from Part	(a) 2018	(b) 2017	(c) 2016	(d) 2015	(e) Total
	I or the minimum investment	, .	, ,			
	return from Part X for each year listed					
h	85% of line 2a					
	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					
е	Qualifying distributions made					
	directly for active conduct of					
	exempt activities Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the					
а	"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 invest-					
	ment return shown in Part X, line 6 for each year listed					
С	"Support" alternative test - enter					
	(1) Total support other than					
	gross investment income (interest, dividends, rents,					
	payments on securities loans (seption 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 sup- port from an exempt					
	organization			l		
_	(4) Gross investment income .					<u> </u>
Pa		ntary Information (Curing the year - see		only if the founda	ation had \$5,000 o	r more in assets at
_	Information Regarding		 		 	
	List any managers of			e than 2% of the tota	al contributions receiv	ved by the foundation
_	before the close of any					,
	ATTACHME	Nπ 5	•	, ,		
	List any managers of		own 10% or more of	f the stock of a corn	oration (or an equally	v large portion of the
_	ownership of a partner					, laige pertien et tile
				-		
	N/A					
2	Information Regarding	g Contribution, Grant,	Gift, Loan, Scholarsh	ip, etc., Programs:		
	Check here ▶ X If t	he foundation only i	makes contributions	to preselected char	itable organizations a	and does not accept
	unsolicited requests for	or funds. If the founda	ation makes gifts, gra	ints, etc., to individua	ils or organizations ur	nder other conditions,
	complete items 2a, b, c	c, and d See instructio	ns			
а	The name, address, ar	nd telephone number	or email address of th	e person to whom app	olications should be add	Iressed
Þ	The form in which appl	ications should be sub	mitted and information	on and materials they	should include	
_	Any submission deadling	nes				
Ū	y casimosion acadii					
d	Any restrictions or li	mitations on awards,	such as by geogra	aphical areas, charita	able fields, kinds of	institutions, or other
	factors					

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid Dur Recipient Name and address (home or business)	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution	Amount
a Paid during the year				
ATCH 6				
		1		
		1		
•		•		
•				
		•		
		Ì		1
		}		
			,	
_				
Total			▶ 3a	83,650.
b Approved for future payment				
	•			
				,
•				
j				
		•		
			·	
Total			▶ 3b	

Part XV	I-A Analysis of Income-Prod	ucing Act	ivities		·		
Enter gross amounts unless otherwise indicated		Unrelated business income Excluded by			y section 512, 513, or 514	(e)	
1 Program	m service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions)	
-						Tocc mandonons /	
							
						·	
· -							
· —	and contracts from government agencies			†			
_	ership dues and assessments						
	on savings and temporary cash investments			14	416.	<u> </u>	
	nds and interest from securities		-	14	32,190.		
	ntal income or (loss) from real estate						
	ot-financed property						
	debt-financed property						
	tal income or (loss) from personal property					· · · · · · · · · · · · · · · · · · ·	
	nvestment income						
	(loss) from sales of assets other than inventory			18	168,220.		
	ome or (loss) from special events		·				
	profit or (loss) from sales of inventory						
	evenue a						
c							
d							
е							
	al Add columns (b), (d), and (e)				200,826.		
	Add line 12, columns (b), (d), and (e)		<i></i>		13	200,826.	
	sheet in line 13 instructions to verify calcu					.	
Part XVI				•		**	
Line No.	Explain below how each activity		·	-	·	•	
▼	accomplishment of the foundation	on's exemp	t purposes (other than I	by providing	funds for such purposes	s) (See instructions)	
	<u> </u>						
		•					
			•				
						-	
				-	**		
-							
			•				
					-		

Form 99	0-PF (20	18)	CARYL H.	AND BERNARD M. SUS	MAN FAI	ATTA	20-806	8/88	Pa	ge 1
Part		Exempt Organ	nizations	nsfers to and Transa				chari	lable	!
ir		on 501(c) (other		ngage in any of the follow 501(c)(3) organizations)					Yes	No
a T	ransfer	s from the reporting	ig foundation to	a noncharitable exempt or	ganization (of				ı
										Х
	-						• • • • • • • •	1a(2)		X
		ansactions								Х
•	•			pt organization le exempt organization						X
				ussets						X
-	•		•							Х
										Х
		_		p or fundraising solicitations						X
-	•		· ·	, other assets, or paid emp						Х
d If	the ar	nswer to any of th	ie above is "Yes	," complete the following	schedule	Column (b) shou	ld always shov	the 1	fair m	arke
				es given by the reporting ement, show in column (d						
(a) Line	no	(b) Amount involved	(c) Name of no	ncharitable exempt organization	(d) D	escription of transfers, ti	ansactions, and sha	rıng arra	ngeme	nts
		N/A			N/A					
				· · · · · · · · · · · · · · · · · · ·						
	 						-			
										
					- 					
	+-				-					
					-	<u> </u>				
				· · · · · · · · · · · · · · · · · · ·		· · · · · · · · · · · · · · · · · · ·				
							· · · · · · · · · · · · · · · · · · ·			
d	escribe		(other than sect	lated with, or related to, ion 501(c)(3)) or in section				Ye	s X	
		(a) Name of organization	n	(b) Type of organization	<u>.</u>	(c) De	scription of relations	ship		
					-					
		····								
——										
		 								
				d this return, including accompanying payer) is based on all information of wh			best of my knowledg	je and b	elief, it	ıs tru
Sign	15	30. 011	0.	14/4/19	D P.	endent	May the IPS			returr
Here	Simo	was at attract of the	Januar	7/3/'/	- '	ma en	with the pro			elow?
	Signat	ture of officer or trustee		Date	Title		See instruction	s	Yes	
	T F	Print/Type preparer's na	me	Preparer's signature		Date	Check if	PTIN		
Paid		EFFREY D HAS		JEFFREY D HASKEL	L	04/02/2019		P013	1577	0

800-839-1754

Firm's EIN ▶ 510398347

Phone no

11042

Preparer

Use Only

Firm's name

▶ FOUNDATION SOURCE

LAKE SUCCESS, NY

Firm's address ▶ ONE HOLLOW LN, STE 212

ATTACHMENT 1

FORM 990PF, PART I - TAXES

REVENUE AND EXPENSES PER BOOKS

DESCRIPTION

990-PF ESTIMATED TAX FOR 2018 990-PF EXCISE TAX FOR 2017

4,600. 3,372.

TOTALS

7,972.

ATTACHMENT 2

- OTHER EXPENSES PART I FORM 990PF,

DESCRIPTION
ADMINISTRATIVE FEES
STATE OR LOCAL FILING FEES

REV. AND AND EXPENSES PER BOOKS 12,850.

2,875.

TOTALS

PURPOSES 12,850. 25. CHARITABLE

12,875.

ATTACHMENT 2

CARYL H. AND BERNARD M. SUSMAN FAMILY

ATTACHMENT

20-8068788

- CORPORATE STOCK PART II FORM 990PE,

ENDING ENDING BOOK VALUE FMV	146,072. 140,474. 201,402. 164,742. 151,876. 142,807. 157,647. 234,013. 178,849. 169,992. 184,523. 132,933. 174,785. 161,013. 192,525. 290,548.	1,760,092.
END		LS 2,
DESCRIPTION	AKRE FOCUS INSTITUTIONAL BROWN CAPITAL MANAGEMENT SMALL FIDELITY ADVSR BIOTECH CL I LAZARD GLOBAL LISTED INFRASTRU PARNASSUS ENDEAVOR FUND INSTIT PIMCO INCOME FUND SEVENTY SEVEN ESCROW PENDING D T. ROWE PRICE GLBL TECH FD INC TCW EMERGING MARKETS INCOME FU WASATCH SMALL CAP VALUE FUND I YACKTMAN FOCUSED FUND INST CL	TOTAI

2018 FORM 990-PF CARYL H. AND BERNARD M. SUSMAN FAMILY

20-8068788

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kınd of F		INS AND LC		ription		P 0 D	Date acquired	Date sold
Gross sale	Depreciation	Cost or	FMV	Adj basis	Excess of	╢	Gain	
price less expenses of sale	allowed/ allowable	other basis	as of 12/31/69	as of 12/31/69	FMV over adj basis	Щ	or (loss)	
984,544.		PUBLICLY-TRA	ADED SECURI				334,968.	
TOTAL GAIN(L	OSS)						334,968.	
	,							
							1	
		5						
					į			

FORM 990PF, PART VIII - LIST OF OFFICERS,	ERS, DIRECTORS, AND TRUSTEES		ATTACHMENT	MENT 4
NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
BERNARD M SUSMAN FOUNDATION SOURCE 501 SILVERSIDE RD WILMINGTON, DE 19809-1377	PRES, DIR, SEC 1.00		ö	. 0
CARYL H SUSMAN FOUNDATION SOURCE 501 SILVERSIDE RD WILMINGTON, DE 19809-1377	DIR, VP 1.00	. 0	.0	.0
JOHN D SUSMAN FOUNDATION SOURCE 501 SILVERSIDE RD WILMINGTON, DE 19809-1377	VP 1.00	.0	.0	.0
WILLIAM J SUSMAN FOUNDATION SOURCE 501 SILVERSIDE RD WILMINGTON, DE 19809-1377	VP 1.00	.0	.0	.0
	GRAND TOTALS	0	0	•0

ATTACHMENT 5

FORM 990PF, PART XV - INFORMATION REGARDING FOUNDATION MANAGERS

BERNARD M SUSMAN CARYL H SUSMAN

ATTACHMENT 6

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND	·	
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
AMERICAN JEMISH WORLD SERVICE INC 45 W 36TH ST, 11TH FL NEW YORK, NY 10018	N/A PC	GENERAL & UNRESTRICTED	400
ANTI DEFAMATION LEAGUE FOUNDATION 505 3RD AVE NEW YORK, NY 10158	N/A PC	GENERAL & UNRESTRICTED	200
ATYPICAL SPORTS AND LEARNING FOUNDATION INC 401 WILLIAM ST UNIT 6274 RIVER FOREST, IL 60305	N/A PC	GENERAL & UNRESTRICTED	300
BOY SCOUTS OF AMERICA 2745 SKOKIE VALLEY RD HIGHLAND PARK, IL 60035	N/A PC	THE BSA SPECIAL NEEDS FUND	100
BUILD INCORPORATED 5100 W HARRISON ST CHICAGO, IL 60644	N/A PC	GENERAL & UNRESTRICTED	200
CHICAGO CHILDRENS ADVOCACY CENTER 1240 S DAMEN AVE CHICAGO, IL 60608	N/A PC	GENERAL & UNRESTRICTED	200

FORM 990PE, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

2018 FORM 990-PF

20-8068788

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
EVANS SCHOLARS FOUNDATION ONE BRIAR RD GOLF, IL 60029	N/A PC	GENERAL & UNRESTRICTED	250
FIELD MUSEUM OF NATURAL HISTORY 1400 S LAKE SHORE DR CHICAGO, IL 6060S	N/A PC	MADAGASCAR SUPPORT FUND	1,000
TRIENDS OF THE WORLD FOOD PROGRAM INC 1725 EYE ST NW STE 510 WASHINGTON, DC 20006	N/A PC	GENERAL & UNRESTRICTED	200
GLENKIRK 1925 N CLYBOURN AVE STE 200 CHICAGO, IL 60614	N/A PC	GENERAL & UNRESTRICTED	500
GREATER CHICAGO FOOD DEPOSITORY 4100 W ANN LURIE PL CHICAGO, IL 60632	N/A PC	GENERAL & UNRESTRICTED	009
HADASSAH THE WOMENS ZIONIST ORGANIZATION OF AMERIC 40 WALL ST NEW YORK, NY 1000S	N/A PC	GENERAL & UNRESTRICTED	400

ATTACHMENT 6 (CONT'D)

2018 FORM 990-PF

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR		
	AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
HADASSAH THE WOMENS ZIONIST ORGANIZATION OF AMERIC	4/2	GPNPDA1 C HMBFGFD174FD	c u
40 WALL ST	: C		2
NEW YORK, NY 10005			
HIAS INC	N/A	GENERAL & UNRESTRICTED	200
411 STH AVE 10TH FL	26		
NEW YORK, NY 10016			
HILLEL THE FOUNDATION FOR JEWISH CAMPUS LIFE	N/A	GENERAL & UNRESTRICTED	200
800 8TH ST NW	PC		
WASHINGTON, DC 20001			
HUNGER RESOURCE NETWORK	. N/A	GENERAL & UNRESTRICTED	200
3025 WALTERS AVE	20		
NORTHBROOK, IL 60062			
HYPERBARIC EDUCATION AND DEVELOPMENT SERVICES	N/A	GENERAL & INREGUETOTED	000
1535 LAKE COOK RD STE 404		•	
NORTHBROOK, IL 60062			
	•		
ILLINOIS COUNCIL AGAINST HANDGUN VIOLENCE	N/A	GENERAL & UNRESTRICTED	300
222 S MORGAN ST STE 4A	. 24		
CHICAGO, IL 60607			

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR		
	AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION A	AMOUNT
INDIGENOUS LENSES	. A/N	EDUCATION FUND FOR GIRLS OF ANY AGE THFOUGH	1,500
1050 S WINDSOR ST	22	COLLEGE	
SALT LAKE CTY, UT 84105			
ISRAEL21C	N/A	GENERAL & UNRESTRICTED	200
44 MONTGOMERY ST, 41ST FL	PC		
SAN FRANCISCO, CA 94104			
ATTENDE MEGALI MA TTANIA DATA			;
MISH COUNCIL ON URBAN AFFAINS	N/A	GENERAL & UNKESTRICTED	100
4700 N RAVENSWOOD AVE STE B	PC		
CHICAGO, IL 60640			
JEWISH NATIONAL FUND-KEREN KAYEMETH LEISRAEL INC	ď. N	GENERAL & UNRESTRICTED	00.5
			2
42 E 69TH ST	PC		
NEW YORK, NY 10021			
THE THEORY TO STATE INTERNAL VORCEOUS AND TAXABLE AND TOTAL	47.5		;
PALSH AND DEPOCRACE ACLION ALLIANCE OF NORTH AND	N/N	GENERAL & UNRESTRICTED	15,000
364 W 117TH ST, 4C	PC		
NEW YORK, NY 10026			
		•	
REREN YEHOSHUA V YISROEL INC	N/A	GENERAL & UNRESTRICTED	200
125 CAREY ST	PC		
LAKEWOOD, NJ 08701			

FORM 990PE, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
MEDECINS SANS FRONTIERES USA INC 40 RECTOR ST 16TH FL NEW YORK, NY 10006	N/A PC	GENERAL & UNRESTRICTED	200
MIDDLE EAST PEACE DIALOGUE NETWORK INC 11 CLIFTON CT PIKESVILLE, MD 21208	N/A PC	MOMEN WAGE PEACE PROGRAM	250
MORRISSEY-COMPTON EDUCATIONAL CENTER 595 PRICE AVE REDWOOD CITY, CA 94063	N/A PC	FUND DREAMS EVENT AND CHALLENGE SCHOOL SUMMER CAMP SCHOLARSHIP FUND	1,500
MOTHERS AGAINST SENSELESS KILLINGS FOUNDATION 5044 S MICHIGAN AVE CHICAGO, IL 60615	N/A PC	GENERAL & UNRESTRICTED	100
NATIONAL ALLIANCE FOR RESEARCH ON SCHIZOPHRENIA AN 747 3RD AVE 33RD FL NEW YORK, NY 10017	N/A PC	GENERAL & UNRESTRICTED	1,000
P S IT S SOCIAL 2922 CENTRAL ST EVANSTON, IL 60201	N/A PC	CURT'S CAFE PROGRAM	250

FORM 990PE, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR		
RECIPIENT NAME AND ADDRESS	AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
PARTNERS HEALTHCARE SYSTEM INC - MASSACHUSETTS GEN	N/A	THE CHARLEY DAVIDSON LEUKEMIA FUND	1,000
125 NASHUA ST, STE 540			
BOSTON, MA 02114			,
PILGRIM CHAMBER PLAYERS	N/A	GENERAL & UNRESTRICTED	200
805 MOSELEY RD	PC	•	
HIGHLAND PARK, IL 60035			
SELAH FREEDOM INC	N/A	GENERAL & UNRESTRICTED	250
PO BOX 21415	PC		
SARASOTA, FL 34276			
SGA YOUTH & FAMILY SERVICES NFP	N/A	GENERAL & UNRESTRICTED	250
11 E ADAMS ST	PC		
CHICAGO, IL 60603			
SHELTER INC	N/A	GENERAL & UNRESTRICTED	100
1616 N ARLINGTON HTS RD	PC		
ARLINGTON HEIGHTS, IL 60004			
SMILE TRAIN INC	N/A	GENERAL & UNRESTRICTED	250
PO BOX 96231	PC		
WASHINGTON, DC 20090			

2018 FORM 990-PF

20-8068788

FORM 990PE, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 6 (CONT'D)

TON	250	100	005
PURPOSE OF GRANT OR CONTRIBUTION	GENERAL & UNRESTRICTED	GENERAL & UNRESTRICTED	GENERAL & UNRESTRICTED
RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	N/A	N/A	N/A
	PC	PC	PC
RECIPIENT NAME AND ADDRESS	THE DRAMATISTS GUILD FUND INC	WINNETKA YOUTH ORGANIZATION	WORLD LEARNING INC
	1501 BROADWAY STE 701	PO BOX 302	PO BOX 676
	NEW YORK, NY 10036	WINNETKA, IL 60093	BRATTLEBORO, VT 05302

83,650

TOTAL CONTRIBUTIONS PAID

ATTACHMENT 6