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EXTENDED TO NOVEMBER 15, 2019

Return of Private Foundation

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

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

OMB No 1545-0052

2018

Open to Public Inspection

Form **990-PF**

Department of the Treasury
Internal Revenue Service

For calendar year 2018 or tax year beginning

, and ending

Name of foundation

PATRIARCH FAMILY FOUNDATION

(C/O) ANTHONY IMBESI

A Employer identification number

20-8353260

Number and street (or P.O. box number if mail is not delivered to street address)

311 N. SUMNEYTOWN PIKE

Room/suite

1A

B Telephone number

215-699-1100

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

NORTH WALES, PA 19454-2532

C If exemption application is pending, check here

D 1. Foreign organizations, check here

2. Foreign organizations meeting the 85% test, check here and attach computation

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

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

G Check all that apply:

Initial return

Initial return of a former public charity

Final return

Amended return

Address change

Name change

H Check type of organization:

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

Section 4947(a)(1) nonexempt charitable trust

Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)

J Accounting method:

☒ Cash

Accrual

Other (specify)

\$ **31,327,521.** (Part I, column (d) must be on cash basis.)

Part I

Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

Revenue	1	Contributions, gifts, grants, etc., received	2,476,700.		N/A	
	2	Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	563,814.	563,814.		STATEMENT 1
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	725,059.			
	b	Gross sales price for all assets on line 6a	5,771,040.			
	7	Capital gain net income (from Part IV, line 2)		725,059.		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
Operating and Administrative Expenses	b	Less: Cost of goods sold				
	c	Gross profit or (loss)				
	11	Other income	179,758.	2,267.		STATEMENT 2
	12	Total. Add lines 1 through 11	3,945,331.	1,291,140.		
	13	Compensation of officers, directors, trustees, etc	40,688.	0.	RECEIVED	40,688.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits			NOV 18 2019	
	16a	Legal fees STMT 3	11,816.	0.		11,816.
	b	Accounting fees STMT 4	14,070.	0.		14,070.
	c	Other professional fees STMT 5	72,520.	72,520.	OGDEN, UT	0.
	17	Interest				
	18	Taxes STMT 6	35,069.	30,994.		3,425.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses STMT 7	1,139.	1,139.		0.
	24	Total operating and administrative expenses. Add lines 13 through 23	175,302.	104,653.		69,999.
	25	Contributions, gifts, grants paid	1,334,500.			1,334,500.
	26	Total expenses and disbursements. Add lines 24 and 25	1,509,802.	104,653.		1,404,499.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	2,435,529.			
	b	Net investment income (if negative, enter -0-)		1,186,487.		
	c	Adjusted net income (if negative, enter -0-)			N/A	

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Part II Balance Sheets <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		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	3,368,367.	3,921,723.	3,921,723.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations STMT 9	8,850,080.	9,745,875.	9,740,060.
	b Investments - corporate stock STMT 10	7,417,983.	7,358,363.	10,217,025.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 11	5,836,026.	6,965,992.	7,448,713.	
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	25,472,456.	27,991,953.	31,327,521.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26, and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	25,472,456.	27,991,953.	
	30 Total net assets or fund balances	25,472,456.	27,991,953.	
31 Total liabilities and net assets/fund balances	25,472,456.	27,991,953.		

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	25,472,456.
2 Enter amount from Part I, line 27a	2	2,435,529.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	83,968.
4 Add lines 1, 2, and 3	4	27,991,953.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	27,991,953.

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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			
b CAPITAL GAIN DISTRIBUTION			
c FROM PARTNERSHIP K-1			
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 5,760,268.		5,045,981.	714,287.
b 2,566.			2,566.
c 8,206.			8,206.
d			
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			714,287.
b			2,566.
c			8,206.
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	725,059.
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	1,218,694.	29,519,598.	.041284
2016	1,184,302.	25,917,796.	.045695
2015	1,242,718.	24,683,760.	.050346
2014	919,243.	22,414,164.	.041012
2013	703,458.	18,804,531.	.037409

2 Total of line 1, column (d)	2	.215746
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	.043149
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	32,402,989.
5 Multiply line 4 by line 3	5	1,398,157.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	11,865.
7 Add lines 5 and 6	7	1,410,022.
8 Enter qualifying distributions from Part XII, line 4	8	1,404,499.

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.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1.
Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b

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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)

5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2018 estimated tax payments and 2017 overpayment credited to 2018

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

7 Total credits and payments. Add lines 6a through 6d

8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

11 Enter the amount of line 10 to be: Credited to 2019 estimated tax

12,629. Refunded

Part VII A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c Did the foundation file Form 1120-POL for this year?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.

2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.

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

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

b If "Yes," has it filed a tax return on Form 990-T for this year?

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

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 directions that conflict with the state law remain in the governing instrument?

7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV

8a Enter the states to which the foundation reports or with which it is registered. See instructions. PA

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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Part VII-A Statements Regarding Activities (continued)

<p>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</p> <p>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 12 SEE STATEMENT 13</p> <p>13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A</p> <p>14 The books are in care of ► MR. ANTHONY IMBESI Telephone no. ► 610-699-1100 Located at ► 311 N. SUMNEYTOWN PIKE, STE. 1A, NORTH WALES, PA ZIP+4 ► 19454</p> <p>15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A</p> <p>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 ►</p>	<table border="1"> <tr> <th></th> <th>Yes</th> <th>No</th> </tr> <tr> <td>11</td> <td></td> <td align="center">X</td> </tr> <tr> <td>12</td> <td align="center">X</td> <td></td> </tr> <tr> <td>13</td> <td align="center">X</td> <td></td> </tr> </table>		Yes	No	11		X	12	X		13	X		<table border="1"> <tr> <th></th> <th>Yes</th> <th>No</th> </tr> <tr> <td>16</td> <td></td> <td align="center">X</td> </tr> </table>		Yes	No	16		X
	Yes	No																		
11		X																		
12	X																			
13	X																			
	Yes	No																		
16		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.

<p>1a During the year, did the foundation (either directly or indirectly):</p> <p>(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(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</p> <p>(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(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</p> <p>(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</p> <p>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 N/A <input type="checkbox"/></p> <p>c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018? 1c <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>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)):</p> <p>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 ►</p> <p>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</p> <p>c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. N/A</p> <p>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</p> <p>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</p> <p>4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?</p> <p>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 <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	<table border="1"> <tr> <th></th> <th>Yes</th> <th>No</th> </tr> <tr> <td>1b</td> <td></td> <td></td> </tr> <tr> <td>1c</td> <td></td> <td align="center">X</td> </tr> <tr> <td>2b</td> <td></td> <td></td> </tr> <tr> <td>3b</td> <td></td> <td></td> </tr> <tr> <td>4a</td> <td></td> <td align="center">X</td> </tr> <tr> <td>4b</td> <td></td> <td align="center">X</td> </tr> </table>		Yes	No	1b			1c		X	2b			3b			4a		X	4b		X
	Yes	No																				
1b																						
1c		X																				
2b																						
3b																						
4a		X																				
4b		X																				

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

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

N/A
▶ ☐

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?

N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870.

☐ Yes ☒ No

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

N/A

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

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?

☐ Yes ☒ 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		40,688.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

▶ **0**

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

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

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

	Expenses
1 N/A	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0.

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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	29,337,189.
b	Average of monthly cash balances	1b	3,559,247.
c	Fair market value of all other assets	1c	0.
d	Total (add lines 1a, b, and c)	1d	32,896,436.
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	32,896,436.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	493,447.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	32,402,989.
6	Minimum investment return. Enter 5% of line 5	6	1,620,149.

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	1,620,149.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	23,730.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	54.
c	Add lines 2a and 2b	2c	23,784.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,596,365.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,596,365.
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	1,596,365.

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	1,404,499.
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	1,404,499.
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	1,404,499.

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.

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PATRIARCH FAMILY FOUNDATION

Form 990-PF (2018)

C/O ANTHONY IMBESI

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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				1,596,365.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			1,320,807.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013				
b From 2014	6,751.			
c From 2015				
d From 2016	52.			
e From 2017				
f Total of lines 3a through e	6,803.			
4 Qualifying distributions for 2018 from Part XII, line 4: ► \$ 1,404,499.				
a Applied to 2017, but not more than line 2a			1,320,807.	
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				83,692.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)	6,803.			6,803.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
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				1,505,870.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				

PATRIARCH FAMILY FOUNDATION

Form 990-PF (2018)

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Part XV **Supplementary Information** *(continued)*

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
MCAP RUN FOR THE HILL OF IT 409 CHERRY STREET NORRISTOWN, PA 19401		PC	GENERAL FUND	5,000.
CYSTIC FIBROSIS FDN DELA 4550 MONTGOMERY AVE., SUITE 1100 N BETHESDA, MD 20814		PC	GENERAL FUND	2,500.
AJ FOUNDATION FOR CHILDREN P.O. BOX 234 WYCOMBE, PA 18980		PC	GENERAL FUND	258.
CYSTIC FIBROSIS FOUNDATION_GOLF OUTING 4550 MONTGOMERY AVE., SUITE 1100 N BETHESDA, MD 20814		PC	GENERAL FUND	30,000.
GWYNEDD MERCY ACADEMY ELEMENTARY 1345 SUMNEYTOWN PIKE GWYNEDD VALLEY, PA 19437		PC	GENERAL FUND	10,000.
Total	SEE CONTINUATION SHEET(S)			1,334,501.
b Approved for future payment				
NONE				
Total				0.

Form **990-PF** (2018)

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

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		Related or exempt function income
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities			14	563,814.		
5 Net rental income or (loss) from real estate:						
a Debt-financed property						
b Not debt-financed property						
6 Net rental income or (loss) from personal property						
7 Other investment income	900001	2,084.	14	183.		
8 Gain or (loss) from sales of assets other than inventory			18	725,059.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a NONDIVIDEND						
b DISTRIBUTIONS			14	2,353.		
c TAX EXEMPT INCOME			14	173,441.		
d TAX EXEMPT OID INCOME			14	1,697.		
e _____						
12 Subtotal. Add columns (b), (d), and (e)		2,084.		1,466,547.		0.
13 Total. Add line 12, columns (b), (d), and (e)					13	1,468,631.

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

Form 990-PF (2018)

C/O ANTHONY IMBESI

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

- | | | | | | |
|---|--|-------|--|--|--|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)(3) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | | | |
| | (1) Cash | 1a(1) | | | |
| | (2) Other assets | 1a(2) | | | |
| b | Other transactions: | | | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | | | |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | | | |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | | | |
| | (4) Reimbursement arrangements | 1b(4) | | | |
| | (5) Loans or loan guarantees | 1b(5) | | | |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | | | |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | | | |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | | | |

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date _____

► **TRUSTEE**

May the IRS discuss this return with the preparer shown below? See instr

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if
self-employed

PTIN

DAVID F. DOTSON

11-12-19

P00738401

Firm's name ► DELOITTE TAX LLP

Firm's EIN ► 86-1065772

Firm's address ► 1700 MARKET STREET, 25TH FLOOR
PHILADELPHIA, PA 19103-3984

Phone no. 215 246 2300

Form **990-PF** (2018)

**PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI**

20-8353260

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MCAP 409 CHERRY STREET NORRISTOWN, PA 19401		PC	GENERAL FUND	20,000.
ABINGTON HEALTH FOUNDATION 1200 OLD YORK RD ABINGTON, PA 19001		PC	GENERAL FUND	2,000.
ALLEN TOWNSHIP FIRE COMPANY #1 3530 HOWERTOWN RD, NORTHAMPTON, PA 18067		PC	GENERAL FUND	1,000.
MONTGOMERY BAR FOUNDATION 100 W AIRY ST NORRISTOWN, PA 19401		PC	GENERAL FUND	250.
GWYNEDD MERCY ACADEMY HIGHSCHOOL 1345 SUMNEYTOWN PIKE GWYNEDD VALLEY, PA 19437		PC	GENERAL FUND	33,250.
FAITH IN THE FUTURE 222 NORTH 17TH ST. PHILADELPHIA, PA 19103		PC	GENERAL FUND	15,000.
MERCY NEIGHBORHOOD MINISTRIES 1939 W. VENANGO STREET PHILADELPHIA, PA 19140		PC	GENERAL FUND	25,000.
DREXEL-SCHOOL OF EDUCATION 3401 MARKET STREET 3RD FLOOR SUITE 3000 PHILADELPHIA, PA 19104		PC	GENERAL FUND	5,000.
CHURCH FARM SCHOOL 1001 E LINCOLN HWY EXTON, PA 19341		PC	GENERAL FUND	16,000.
MERCY FOCUS ON HAITI 1415 CEDAR POINT RD. NE CEDAR RAPIDS, IA 52402		PC	GENERAL FUND	1,000.
Total from continuation sheets				1,286,743.

**PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI**

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
GWYNEDD MERCEY HIGH SCHOOL-CREW PROGRAM 1345 SUMNEYTOWN PIKE GWYNEDD VALLEY, PA 19437		PC	GENERAL FUND	7,743.
SAINT ROSE OF LIMA - NORTH WALES 428 S MAIN ST. NORTH WALES, PA 19454		PC	GENERAL FUND	1,000.
THE GIVING TREE 333 SW 4TH AVE BOCA RATON, FL 33432		PC	GENERAL FUND	250.
THE ELMWOOD PARK ZOO 1661 HARDING BLVD, NORRISTOWN, PA 19401		PC	GENERAL FUND	2,000.
BOSTON UNIVERSITY 233 BAY STATE ROAD BOSTON, MA 02118		PC	GENERAL FUND	1,000.
MONTGOMERY COUNTY SPCA 19 E. RIDGE PIKE CONSHOHOCKEN, PA 19428		PC	GENERAL FUND	250.
SUFFOLK UNIVERSITY 8 ASHBURTON PL, BOSTON, MA 02108		PC	GENERAL FUND	1,000.
FOR PETE'S SAKE PO BOX 31039 ST. LOUIS, MO 63131		PC	GENERAL FUND	5,000.
TWIN PALMS CENTER FOR THE DISABLED 306 NW 35TH ST. BOCA RATON, FL 33431		PC	GENERAL FUND	1,000.
UDT SEAL MUSEUM ASSOCIATION INC 3300 N. HWY. A1A, NORTH HUTCHINSON ISLAND FORT PIERCE, FL 34949		PC	GENERAL FUND	5,000.
Total from continuation sheets				

PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
KEYS CHILDREN FOUNDATION 24 DOCKSIDE LANE PMB 139 KEY LARGO, FL 33037		PC	GENERAL FUND	10,000.
HOLY SPIRIT-MUSIC DEPARTMENT		PC	GENERAL FUND	17,500.
OCEAN REEF MEDICAL CENTER		PC	GENERAL FUND	10,000.
THE FREE LIBRARY OF PHILADELPHIA FOUNDATION		PC	GENERAL FUND	11,000.
THE FREE LIBRARY OF PHILADELPHIA FOUNDATION		PC	GENERAL FUND	7,500.
WEATHERVANE MUSIC		PC	GENERAL FUND	16,000.
UNIVERSITY OF PENNSYLVANIA, MASTER OF PUBLIC HEALTH		PC	GENERAL FUND	16,000.
UCLA- SEMEL INSTITUTE		PC	GENERAL FUND	4,500.
THE ED SNIDER YOUTH HOCKEY FOUNDATION		PC	GENERAL FUND	10,000.
USC DORNSIFE COLLEGE OF LETTERS		PC	GENERAL FUND	17,000.
Total from continuation sheets				

PATRIARCH FAMILY FOUNDATION
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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
UNIVERSITY OF MIAMI SYLVESTER COMPREHENSIVE CANCER CENTER		PC	GENERAL FUND	2,500.
VILLANOVA UNIVERSITY		PC	GENERAL FUND	40,000.
SAINT AUGUSTINE PREP		PC	GENERAL FUND	21,000.
GWYNEDD MERCY ACADEMY ELEMENTARY		PC	GENERAL FUND	26,500.
SHORE MEDICAL CENTER FOUNDATION		PC	GENERAL FUND	10,000.
THE FREE LIBRARY OF PHILADELPHIA FOUNDATION		PC	GENERAL FUND	40,000.
PHILADELPHIA MUSEUM OF ART		PC	GENERAL FUND	31,000.
CHOP FOUNDATION		PC	GENERAL FUND	50,000.
CROHNS & COLITIS FOUNDATION OF AMERICA		PC	GENERAL FUND	50,000.
PENN VET		PC	GENERAL FUND	10,000.
Total from continuation sheets				

PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI

20-8353260

Part XV | **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
ST. FRANCIS DE SALES SCHOOL		PC	GENERAL FUND	15,500.
DREXEL UNIVERSITY		PC	GENERAL FUND	41,500.
NATIONAL CONSTITUTION CENTER		PC	GENERAL FUND	30,000.
PENN MEDICINE DEVELOPMENT		PC	GENERAL FUND	50,000.
CYSTIC FIBROSIS FOUNDATION		PC	GENERAL FUND	40,000.
SISTERS OF MERCY-RETIREMENT- MC CAULEY CONVENT		PC	GENERAL FUND	20,000.
POLICE ATHLETIC LEAGUE		PC	GENERAL FUND	10,000.
PHILADELPHIA ZOO		PC	GENERAL FUND	12,000.
NATIONAL CONSTITUTION CENTER		PC	GENERAL FUND	30,000.
PHILLY FIGHTS CANCER C/O ABRAMSON CANCER CENTER		PC	GENERAL FUND	10,000.
Total from continuation sheets				

PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI

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Part XV **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
ST. RITA OF CASCIA HIGH SCHOOL		PC	GENERAL FUND	10,500.
THE PHILADELPHIA ORCHESTRA ASSOCIATION		PC	GENERAL FUND	30,000.
INDEPENDENCE MISSION SCHOOLS		PC	GENERAL FUND	20,000.
HOLY SPIRIT HIGH SCHOOL		PC	GENERAL FUND	20,000.
HEALTHLINK DENTAL CLINIC, INC.		PC	GENERAL FUND	15,500.
BOSTON UNIVERSITY		PC	GENERAL FUND	26,000.
VILLANOVA UNIVERSITY-URBINO PROGRAM		PC	GENERAL FUND	40,000.
ST. MATTHEW SCHOOL		PC	GENERAL FUND	10,000.
THOMAS JEFFERSON UNIVERSITY		PC	GENERAL FUND	41,500.
CYSTIC FIBROSIS FOUNDATION		PC	GENERAL FUND	10,000.
Total from continuation sheets				

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2018

Name of the organization

**PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI**

Employer identification number

20-8353260

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

- ☐ 501(c)() (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

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

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

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

Name of organization

PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI

Employer identification number

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Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	MARGARET E. HARRON CHARITABLE LEAD UNITRUST 34 ISLAND DRIVE KEY LARGO, FL 33037	\$ 2,476,700.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI

Employer identification number

20-8353260

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____

Name of organization

Employer identification number

PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI

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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF		DIVIDENDS AND INTEREST FROM SECURITIES			STATEMENT 1	
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	
DIVIDENDS	435,743.	0.	435,743.	435,743.		
INTEREST	122,239.	0.	122,239.	122,239.		
INTEREST (BLACKSTONE)	5,832.	0.	5,832.	5,832.		
TO PART I, LINE 4	563,814.	0.	563,814.	563,814.		

FORM 990-PF		OTHER INCOME		STATEMENT 2	
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME		
BLACKSTONE OTHER INCOME	183.	183.			
BLACKSTONE OTHER INCOME	2,084.	2,084.			
NONDIVIDEND DISTRIBUTIONS	2,353.	0.			
TAX EXEMPT INCOME	173,441.	0.			
TAX EXEMPT OID INCOME	1,697.	0.			
TOTAL TO FORM 990-PF, PART I, LINE 11	179,758.	2,267.			

FORM 990-PF		LEGAL FEES		STATEMENT 3	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LEGAL FEES	11,816.	0.		11,816.	
TO FM 990-PF, PG 1, LN 16A	11,816.	0.		11,816.	

FORM 990-PF	ACCOUNTING FEES		STATEMENT 4	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DELOITTE TAX, LLP	14,070.	0.		14,070.
TO FORM 990-PF, PG 1, LN 16B	14,070.	0.		14,070.

FORM 990-PF	OTHER PROFESSIONAL FEES		STATEMENT 5	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MERRILL LYNCH FEES	72,520.	72,520.		0.
TO FORM 990-PF, PG 1, LN 16C	72,520.	72,520.		0.

FORM 990-PF	TAXES		STATEMENT 6	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	9,994.	9,994.		0.
FEDERAL TAXES (FORM 990)	21,650.	21,000.		0.
PAYROLL TAXES	3,425.	0.		3,425.
TO FORM 990-PF, PG 1, LN 18	35,069.	30,994.		3,425.

FORM 990-PF	OTHER EXPENSES		STATEMENT 7	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BLACKSTONE DEDUCTIONS	1,139.	1,139.		0.
TO FORM 990-PF, PG 1, LN 23	1,139.	1,139.		0.

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

DESCRIPTION	AMOUNT
BOOK ADJUSTMENT FOR ASSETS RECEIVED FROM JOHN AND PATRICIA IMBESI FOUNDATION	37,714.
TEMPORARY/OTHER BOOK-TAX DIFFERENCES	46,254.
TOTAL TO FORM 990-PF, PART III, LINE 3	83,968.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 9

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT B 2097		X	5,914,095.	5,961,496.
SEE STATEMENT B 2097		X	3,831,780.	3,778,564.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			9,745,875.	9,740,060.
TOTAL TO FORM 990-PF, PART II, LINE 10A			9,745,875.	9,740,060.

FORM 990-PF CORPORATE STOCK STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT B 2097	2,122,909.	3,284,355.
SEE STATEMENT E 2510	637,945.	612,244.
SEE STATEMENT C 2202	2,343,499.	2,532,821.
SEE STATEMENT D 2224	1,742,678.	2,289,033.
SEE STATEMENT A 2073	256,162.	340,368.
SEE STATEMENT F 9033	0.	903,080.
SEE STATEMENT C 2202	255,170.	255,124.
TOTAL TO FORM 990-PF, PART II, LINE 10B	7,358,363.	10,217,025.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT A 2073	COST	6,965,992.	7,448,713.
TOTAL TO FORM 990-PF, PART II, LINE 13		6,965,992.	7,448,713.

FORM 990-PF	EXPLANATION CONCERNING PART VII-A, LINE 12 QUALIFYING DISTRIBUTION STATEMENT	STATEMENT 12
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EXPLANATION

THE FOUNDATION MADE A CONTRIBUTION OF \$250,000 TO THE BANK OF AMERICA CHARITABLE GIFT FUND IN 2018 THAT WAS TREATED AS A QUALIFYING DISTRIBUTION.

FORM 990-PF	EXPLANATION CONCERNING PART VII-A, LINE 12 SECTION 170(C)(2)(B) STATEMENT	STATEMENT 13
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EXPLANATION

PURSUANT TO THE TERMS OF THE DONOR ADVISED FUND, THE DIRECTORS OF THE FOUNDATION WILL DIRECT THE DONOR ADVISED FUND TO DISTRIBUTE THE ASSETS TO PUBLIC CHARITIES.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 14

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
PATRICIA H. IMBESI 34 ISLAND DRIVE KEY LARGO, FL 33037	TRUSTEE 0.00	0.	0.	0.
ANTHONY M. IMBESI 720 PLYMOUTH ROAD, BOX 156 GWYNEDD VALLEY, PA 19437	TRUSTEE 0.00	0.	0.	0.
PAUL H. IMBESI 34 ISLAND DRIVE KEY LARGO, FL 08226	TRUSTEE 0.00	0.	0.	0.
GIOVANNA C. IMBESI 34 ISLAND DRIVE KEY LARGO, FL 08226	TRUSTEE 0.00	0.	0.	0.
CHARLES L. IMBESI 34 ISLAND DRIVE KEY LARGO, FL 08226	TRUSTEE 20.00	40,688.	0.	0.
JOHN C. IMBESI 34 ISLAND DRIVE KEY LARGO, FL 08226	TRUSTEE 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		40,688.	0.	0.

The Patriarch Family Foundation
EIN: 20-8353260
2018 Form 990-PF

Merger of Private Foundation

The Patriarch Family Foundation received all of the assets of the John & Patricia Imbesi Foundation (EIN 23-2494393) upon its complete termination in January 2018 (the "merged foundation"). The total value of the assets received was \$1,154,404, which was less than 5% of the assets of the Patriarch Family Foundation. As a result of the merger, The Patriarch Family Foundation has incorporated the prior adjusted distributions and value of noncharitable-use assets of the merged foundation into its adjusted distributions and value of noncharitable-use assets in Part V of Form 990-PF. In addition, the Patriarch Family Foundation has included the merged foundation's 2017 excess distributions carryover in the amount of \$6,803 on Part XIII of Form 990-PF.