

efile GRAPHIC print - DO NOT PROCESS

As Filed Data -

DLN: 93491134032389

Form 990-PF

Department of the Treasury
Internal Revenue Service

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

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2018

Open to Public Inspection

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

Name of foundation
JOAN AND LEONARD ENGLE FAMILY FOUNDATION

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

City or town, state or province, country, and ZIP or foreign postal code
PROVIDENCE, RI 02906

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) \$ 1,673,795

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify)

A Employer identification number
22-2751779

B Telephone number (see instructions)
(401) 454-7600

C If exemption application is pending, check here

D 1. Foreign organizations, check here

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

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

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

Part I

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

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)			
	2 Check ☒ if the foundation is not required to attach Sch B			
	3 Interest on savings and temporary cash investments	1,722	1,722	
	4 Dividends and interest from securities	45,037	45,037	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	0		
	b Gross sales price for all assets on line 6a 40,000			
	7 Capital gain net income (from Part IV, line 2)		0	
	8 Net short-term capital gain			
	9 Income modifications			
	10a Gross sales less returns and allowances			
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	46,759	46,759		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0	0
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits			
	16a Legal fees (attach schedule)			
	b Accounting fees (attach schedule)	13,800	0	13,800
	c Other professional fees (attach schedule)			
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	976	976	0
	19 Depreciation (attach schedule) and depletion			
	20 Occupancy			
	21 Travel, conferences, and meetings			
	22 Printing and publications			
	23 Other expenses (attach schedule)	10,987	10,937	50
	24 Total operating and administrative expenses. Add lines 13 through 23	25,763	11,913	13,850
	25 Contributions, gifts, grants paid	96,650		96,650
	26 Total expenses and disbursements. Add lines 24 and 25	122,413	11,913	110,500
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	-75,654		
	b Net investment income (if negative, enter -0-)		34,846	
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2018)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	981,590	1,014,829	1,468,476
	c	Investments—corporate bonds (attach schedule)	35,879	0	0
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	274,238	205,345	205,319
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,291,707	1,220,174	1,673,795	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
	Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
24		Unrestricted			
25		Temporarily restricted			
26		Permanently restricted			
Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.					
27		Capital stock, trust principal, or current funds	1,291,707	1,220,174	
28		Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
29		Retained earnings, accumulated income, endowment, or other funds	0	0	
30		Total net assets or fund balances (see instructions)	1,291,707	1,220,174	
31		Total liabilities and net assets/fund balances (see instructions) .	1,291,707	1,220,174	

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	1,291,707
2	Enter amount from Part I, line 27a	2	-75,654
3	Other increases not included in line 2 (itemize) ▶ _____	3	4,121
4	Add lines 1, 2, and 3	4	1,220,174
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	1,220,174

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a 10,000 SHS AMERICAN EXPRESS		2008-11-12	2018-03-16
b 10,000 SHS DOW CHEMICAL CO		2008-11-17	2018-05-15
c 10,000 SHS JOHN DEERE CAP		2008-11-12	2018-09-10
d 10,000 SHS ORACLE CORP		2008-11-26	2018-04-16
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 10,000		10,000	0
b 10,000		10,000	0
c 10,000		10,000	0
d 10,000		10,000	0
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			0
b			0
c			0
d			0
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	0
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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



Yes



No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017	106,894	1,822,459	0 058654
2016	105,454	1,728,923	0 060994
2015	105,338	1,793,764	0 058725
2014	104,172	1,892,539	0 055044
2013	104,975	1,790,858	0 058617

2 Total of line 1, column (d)	2	0 292034
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years	3	0 058407
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	1,772,311
5 Multiply line 4 by line 3	5	103,515
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	348
7 Add lines 5 and 6	7	103,863
8 Enter qualifying distributions from Part XII, line 4	8	110,500

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	348
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	348
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	348
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	1,080
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	1,080
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	732
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ▶ 732 Refunded ▶	11	0

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?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for 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	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ 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	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
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	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ RI			
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 .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ RICHARD ENGLE Telephone no ▶ (401) 454-7600			

Located at **▶** 54 WINGATE ROAD PROVIDENCE RI ZIP+4 **▶** 02906

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ ☐	15		
16	At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶	16	Yes	No

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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? If "Yes," list the years ▶ 20____, 20____, 20____, 20____ ☐ Yes ☒ No			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		No

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

5a	During the year did the foundation pay or incur any amount to		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	☐ Yes ☒ No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.		5b	
	Organizations relying on a current notice regarding disaster assistance check here.	☒		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	☐ Yes ☐ No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No	6b	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			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No	7b	
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 during the year?	☐ Yes ☒ No		

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

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JUDITH ENGLE CLIFFORD TWO HAWTHORNE PLACE 12M BOSTON, MA 02114	TRUSTEE AS NEEDED 2 00	0	0	0
JAMES ENGLE 132 FREEMAN PARKWAY PROVIDENCE, RI 02906	TRUSTEE AS NEEDED 2 00	0	0	0
ROBIN ENGLE 132 FREEMAN PARKWAY PROVIDENCE, RI 02906	TRUSTEE AS NEEDED 2 00	0	0	0
RICHARD ENGLE 54 WINGATE ROAD PROVIDENCE, RI 02906	TRUSTEE AS NEEDED 2 00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	0
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 N/A	0
2	
All other program-related investments. See instructions.	
3 	0
Total. Add lines 1 through 3	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	1,559,458
b	Average of monthly cash balances.	1b	239,843
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,799,301
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	1,799,301
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	26,990
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,772,311
6	Minimum investment return. Enter 5% of line 5.	6	88,616

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	88,616
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	348
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	348
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	88,268
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	88,268
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	88,268

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	110,500
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	110,500
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	348
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	110,152

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				88,268
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013.	15,965			
b From 2014.	13,259			
c From 2015.	16,774			
d From 2016.	22,650			
e From 2017.	17,411			
f Total of lines 3a through e.	86,059			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 110,500				
a Applied to 2017, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2018 distributable amount.				88,268
e Remaining amount distributed out of corpus	22,232			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	108,291			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions).	15,965			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	92,326			
10 Analysis of line 9				
a Excess from 2014.	13,259			
b Excess from 2015.	16,774			
c Excess from 2016.	22,650			
d Excess from 2017.	17,411			
e Excess from 2018.	22,232			

Part XIV

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling. ▶					
b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV **Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)**

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

See Additional Data Table

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

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

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

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

RICHARD ENGLE
54 WINGATE ROAD
PROVIDENCE, RI 02906
(401) 454-7600

b The form in which applications should be submitted and information and materials they should include
NO FORMAL APPLICATION PROCEDURE UTILIZED

c Any submission deadlines

NONE

d	Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
	NONE

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

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

Enter gross amounts unless otherwise indicated

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

Line No. the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

Form **990-PF** (2018)

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

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

--	--	--

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

--	--	--

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

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

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

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

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

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

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

value
ue

[illegible]

described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here Signature of officer or trustee	Date	Title
---	--	---

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
	JACQUELINE B GAIPO CPA		2019-05-08		P01253157
	Firm's name ▶ DISANTO PRIEST & CO				Firm's EIN ▶ 05-0473084
	Firm's address ▶ 117 METRO CENTER BOULEVARD 3000 WARWICK, RI 02886				Phone no (401) 921-2000

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

JUDITH ENGLE CLIFFORD
JAMES ENGLE
ROBIN ENGLE
RICHARD ENGLE

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMOS HOUSE460 PINE STREET PROVIDENCE, RI 02907	N/A	N/A	CHARITABLE	2,700
ANIMAL SHELTER INC 17 LAURELWOOD ROAD STERLING, MA 01564	N/A	N/A	CHARITABLE	250
BAY VIEW ACADEMY 3070 PAWTUCKET AVENUE RIVERSIDE, RI 029155197	N/A	N/A	CHARITABLE	250
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BIRTHDAY WISHESPO BOX 590645 NEWTON, MA 02459	N/A	N/A	CHARITABLE	250
BOSTON CHILDREN'S SCHOOL 300 LONGWOOD AVENUE BOSTON, MA 02115	N/A	N/A	CHARITABLE	250
BOSTON HEALTH CARE FOR THE HOMELESS PROGRAM 780 ALBANY STREET BOSTON, MA 02118	N/A	N/A	CHARITABLE	1,500
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BUTTON HOLEONE BUTTONHOLE DRIVE PROVIDENCE, RI 02909	N/A	N/A	CHARITABLE	1,500
CANCER RESOURCE CENTER OF WESTERN MAINE 199 MAIN STREET NORWAY, ME 04268	N/A	N/A	CHARITABLE	1,600
CROSSROADS RHODE ISLAND 160 BROAD STREET PROVIDENCE, RI 02903	N/A	N/A	CHARITABLE	1,000
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CUMMINGS JEWISH CENTRE FOR SENIORS FOUNDATION 5700 WESTBURY AVENUE MONTREAL, QUEBEC CA	N/A	N/A	CHARITABLE	2,500
GOOD NEIGHBORS ENERGY FUND 50 VALLEY STREET PROVIDENCE, RI 02909	N/A	N/A	CHARITABLE	1,000
GORDON SCHOOL45 MAXFIELD AVENUE EAST PROVIDENCE, RI 02914	N/A	N/A	CHARITABLE	1,500
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JEWISH ALLIANCE OF GREATER RHODE ISLAND 401 ELMGROVE AVENUE PROVIDENCE, RI 02906	N/A	N/A	CHARITABLE	20,000
MASSACHUSETTS GENERAL HOSPITAL 125 NASHUA STREET STE 540 BOSTON, MA 02114	N/A	N/A	CHARITABLE	15,000
MIRIAM HOSPITAL FOUNDATION 164 SUMMIT AVENUE PROVIDENCE, RI 02906	N/A	N/A	CHARITABLE	4,000
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MOSES BROWN SCHOOL 250 LLOYD AVENUE PROVIDENCE, RI 029062398	N/A	N/A	CHARITABLE	1,050
PROJECT SMILEPO BOX 336 HOPEDALE, MA 01747	N/A	N/A	CHARITABLE	2,500
ROSIE'S PLACE889 HARRISON AVENUE BOSTON, MA 02118	N/A	N/A	CHARITABLE	3,500
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SAVE THE BAY100 SAVE THE BAY DRIVE PROVIDENCE, RI 02905	N/A	N/A	CHARITABLE	250
THE LEARNING PROJECT 107 MARLBOROUGH STREET BOSTON, MA 02116	N/A	N/A	CHARITABLE	500
THE VILNA SHUL18 PHILLIPS STREET BOSTON, MA 02114	N/A	N/A	CHARITABLE	3,000
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TOY INDUSTRY FOUNDATION 1375 BROADWAY SUITE 1001 NEW YORK, NY 10018	N/A	N/A	CHARITABLE	1,000
TRINITY REPERTORY COMPANY 201 WASHINGTON STREET PROVIDENCE, RI 029033297	N/A	N/A	CHARITABLE	2,500
VANDERBILT UNIVERSITY 2301 VANDERBILT PLACE NASHVILLE, TN 372407727	N/A	N/A	CHARITABLE	7,500
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WHEATON COLLEGE 26 EAST MAIN STREET NORTON, MA 027662322	N/A	N/A	CHARITABLE	5,000
WOMEN & INFANTS HOSPITAL 101 DUDLEY STREET PROVIDENCE, RI 029052499	N/A	N/A	CHARITABLE	1,000
HOMES FOR OUR TROOPS 6 MAIN STREET TAUNTON, MA 02780	N/A	N/A	CHARITABLE	1,500
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GARY SINISE FOUNDATION PO BOX 368 WOODLAND HILLS, CA 91365	N/A	N/A	CHARITABLE	1,250
CENTER FOR RESILIENCE 249 MANTON AVENUE PROVIDENCE, RI 02909	N/A	N/A	CHARITABLE	100
CONGREGATION BET HA'AM 81 WESTBROOK STREET SOUTH PORTLAND, ME 04106	N/A	N/A	CHARITABLE	500
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CATIE'S CLOSET19 SCHOOL STREET DRACUT, MA 01826	N/A	N/A	CHARITABLE	500
LINCOLN SCHOOL301 BUTLER AVE PROVIDENCE, RI 02906	N/A	N/A	CHARITABLE	250
PLANNED PARENTHOOD 175 BROAD STREET PROVIDENCE, RI 02903	N/A	N/A	CHARITABLE	500
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEEKONK LIBRARY TRUST 401 NEWMAN AVENUE SEEKONK, MA 02771	N/A	N/A	CHARITABLE	100
NEEDHAM COMMUNITY COUNCIL 570 HILLSIDE AVENUE NEEDHAM, MA 02494	N/A	N/A	CHARITABLE	250
JEWISH COLLABORATIVE SERVICES 1165 NORTH MAIN STREET PROVIDENCE, RI 02904	N/A	N/A	CHARITABLE	3,000
Total ► 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BUTLER HOSPITAL 345 BLACKSTONE BLVD PROVIDENCE, RI 02906	N/A	N/A	CHARTIABLE	2,000
DOORWAYS FOOD PANTRY 2 NORTH STREET SEEKONK, MA 02771	N/A	N/A	CHARITABLE	100
CASA BOSTON 85 MERRIMAC ST SUITE 401 BOSTON, MA 02114	N/A	N/A	CHARITABLE	500
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
STEM TO THE FUTURE 931 N HIGHLAND AVE LOS ANGELES, CA 90004	N/A	N/A	CHARITABLE	1,000
BOYS AND GIRLS CLUB OF PROVIDENCE 550 WICKENDEN STREET PROVIDENCE, RI 02903	N/A	N/A	CHARITABLE	250
DARLING JUNE842 SHAGBARK DR ORANGE, CT 06477	N/A	N/A	CHARITABLE	2,000
Total ▶ 3a				96,650

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE BRIDGE CENTER470 PINE STREET BRIDGEWATER, MA 02324	N/A	N/A	CHARITABLE	1,750
Total ▶ 3a				96,650

TY 2018 Accounting Fees Schedule**Name:** JOAN AND LEONARD ENGLE FAMILY FOUNDATION**EIN:** 22-2751779

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	13,800	0		13,800

TY 2018 All Other Program Related Investments Schedule

Name: JOAN AND LEONARD ENGLE FAMILY FOUNDATION
EIN: 22-2751779

Category	Amount
N/A	0

TY 2018 Investments Corporate Stock Schedule

Name: JOAN AND LEONARD ENGLE FAMILY FOUNDATION

EIN: 22-2751779

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
INVESCO SENIOR LOAN ETF	25,925	22,870
ISHARES IBOXX H/Y COR BD ETF	26,220	22,708
ISHARES IBOXX INVEST GR COR BD	77,296	75,589
ISHARES MSCI EAFE ETF	247,753	271,387
ISHARES MSCI EMERGING MKTS ETF	32,869	34,099
ISHARES N AMER NAT RES ETF	17,020	12,313
ISHARES S&P 500 GROWTH ETF	80,720	240,017
ISHARES S&P 500 VALUE ETF	88,083	191,053
ISHARES S&P MID-CAP 400 G ETF	13,312	39,585
ISHARES S&P MID-CAP 400 V ETF	15,702	39,150
ISHARES S&P SMALL-CAP 600 V ETF	11,676	31,117
ISHARES SELECT DIVIDEND ETF	188,536	194,874
ISHARES S&P SMALL CAP 600 G ETF	10,067	34,202
SPDR BBG BARCLAYS HIGH YIE BND	26,226	21,565
SPDR BLACKSTONE GSO SEN LOAN	26,027	23,378
SPDR S&P METALS & MINING	13,265	9,455
VANECK VECTORS AGRIBUSINESS	9,784	11,612
VANECK VECTORS ETF STEEL	4,725	4,494
VANGUARD ENERGY ETF	15,982	12,877
VANGUARD FTSE EMERGING MARKETS	31,936	32,385
VANGUARD MID CAP VALUE ETF	14,917	38,485
VANGUARD MIDCAP GROWTH ETF	13,656	41,413
VANGUARD SM CAP GROWTH ETF	10,810	33,280
VANGUARD SM CAP VALUE ETF	12,322	30,568

TY 2018 Investments - Other Schedule

Name: JOAN AND LEONARD ENGLE FAMILY FOUNDATION

EIN: 22-2751779

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MSILF PRIME PTF INST	AT COST	205,345	205,319

TY 2018 Other Expenses Schedule**Name:** JOAN AND LEONARD ENGLE FAMILY FOUNDATION**EIN:** 22-2751779**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEES	50	0		50
INVESTMENT FEES	10,937	10,937		0

TY 2018 Other Increases Schedule

Name: JOAN AND LEONARD ENGLE FAMILY FOUNDATION

EIN: 22-2751779

Description	Amount
ACCRUED MARKET DISCOUNT	4,121

TY 2018 Taxes Schedule**Name:** JOAN AND LEONARD ENGLE FAMILY FOUNDATION**EIN:** 22-2751779

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	976	976		0