Form 990°PF



Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation
t enter social security numbers on this form as it may be made nublic

11100

2018

	nal Revenue Service		irs.gov/Form990PF for insti	ructions and the latest inf		Open to Public Inspection		
For	calendar year 2018 or tax year be	ginning JUL	1, 2018	, and ending	<u>JUN</u> 30, 2019			
	ime of foundation				A Employer identification	number		
Т	THE JOHN AND CHAI	RLENE <u>ROB</u> E	RTS FAMILY					
F	FOUNDATION, INC.				23-3101766			
Nur	mber and street (or P O box number if mai	I is not delivered to street a	address)	Room/suite	B Telephone number			
(c	c/o)d.j. winkowsi	KI, 30 VAL	LEY STRĖAM PK	ζ	(610) 640-	5800		
_	y or town, state or province, countr			1-	C If exemption application is pe	ending, check here		
	MALVERN, PA 193			ه سه دغه				
		itial return	Initial return of a f	ormer public charity	D 1 Foreign organizations, check here			
-		nal return	Amended return	,	T Poleigh organizations, check here			
	=	idress change	Name change	·	2 Foreign organizations me check here and attach co	eting the 85% test,		
н (kempt private foundation	- 0/1	7			
	Section 4947(a)(1) nonexempt of		Other taxable private found	ation 04	E If private foundation sta under section 507(b)(1)			
_ <u></u>	air market value of all assets at end			Accrual]			
	from Part II, col. (c), line 16)	· —	ther (specify)	Accidal	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here			
			nn (d) must be on cash basi	<u> </u>	under Section 507(b)(1)	(b), check here		
	and Expense and Ex					(d) Disbursements		
SIN	(The total of amounts in columns necessarily equal the amounts in	(b), (c), and (d) may not	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	for charitable purposes		
	1		50,000.		N/A	(cash basis only)		
7	1 Contributions, gifts, grants, e	•		The state of the s	IN// PA			
5_	2 Check I if the foundation is no interest on savings and temporary	iol required to attach Sch B				(74 a) (
1	3 cash investments			0 0 0 0		anampyrayr 1		
7	4 Dividends and interest from s	securities	8,868.	8,868.		STATEMENT 1.		
•	5a Gross rents		Country of Annies and					
	Net rental income or (loss)							
a	6a Net gain or (loss) from sale of asse		11,576.	100 pt 10	A A A A A A A A A A A A A A A A A A A	Way and an		
חק	b assets on time ea	59,503.	graphy and a surprise of the s			alla (al legistra) i manama pro		
ave.	7 Capital gain net income (from Part	IV line 2)		11,576.	FOEN	ED I		
α.	8 Net short-term capital gain				F REUEI	8		
	9 Income modifications					2019 91		
	Gross sales less returns and allowances		C25.4.1		18/2 NOV-174			
	b Less Cost of goods sold				18			
	c Gross profit or (loss)				OGDE	N. U.L.		
	11 Other income					-15.		
_	12 Total Add lines 1 through 1	1	70,444.	20,444.		4 4		
	13 Compensation of officers, directors	s, trustees, etc	0.	0.		0.		
	14 Other employee salaries and	wages						
•	15 Pension plans, employee ben							
es	16a Legal fees	STMT 2	4,650.	4,650.		0.		
esu∈a	b Accounting fees							
Q.X.	c Other professional fees	STMT 3	1,056.	1,056.		0.		
б П	17 Interest	,						
. ‡	18 Taxes	STMT 4	1,946.	0.		0.		
nistrativ	19 Depreciation and depletion							
ב ב	20 Occupancy							
<u>Ą</u>	21 Travel, conferences, and mee	etinas ,						
وَ	22 Printing and publications	4 ·						
ลี	23 Other expenses							
Ę	24 Total operating and adminis	trative		•				
peratin	expenses Add lines 13 throi		7,652.	5,706.		0.		
Ö	25 Contributions, gifts, grants pa		88,750.			88,750.		
	26 Total expenses and disburse			CONTRACTOR DESCRIPTION AND PROPERTY OF THE PRO	The residence of the control of the	55,755		
	Add lines 24 and 25	monto.	96,402.	5,706.		88,750.		
	27 Subtract line 26 from line 12	·	70, 4020					
	1	and distance and	-25,958.	END BOOK CHAPTURE TO A TRADE OF	THE PERSON NAMED OF STREET	CONTRACTOR		
	a Excess of revenue over expenses a b Net investment income (if nee		25,550.	14,738.		A CONTRACTOR OF THE CONTRACTOR		
	C Adjusted net income (if negati			14,750	N/A			

823501 12-11-18 LHA For Paperwork Reduction Act Notice, see instructions

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FOUNDATION, INC.

23-3101766 Page 2

Cash - non-interest-bearing Cash	ĺρ	SH	Balance Sheets Allached schedules and amounts in the description column should be for end of year amounts only	Beginning of year	End o	d of year		
Servings and temporary cash nevestments 3 Accounts recovable ► Less allowance for doubtful accounts ► Less allowance for doubtful accounts ► Less allowance for doubtful accounts ► S Grants receivable B Recovable due from officiers, directors, trustees, and other degualated persons of due never advantage to from officiers, directors, trustees, and other degualated persons I all nevertheres U.S. and state operament obligations I heretiments in comportal accides I measurement U.S. and state operament obligations I heretiments in comportal accides I measurement U.S. and state operament obligations I heretiments incorporate bonds I h	r (+)	ai _t ų	column should be for end of year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value		
A Accounts receivable ► Less allowance for doubtful accounts ► A Pledges receivable ► Less allowance for doubtful accounts ► S Grarts receivable of Foreign and the Pledges receivable ─ Foreign and the Pledges of the Pledges		1	Cash - non-interest-bearing	-1.		-2.		
Less attenue for decidable accounts ▶ Floriges receivable ▶		2	Savings and temporary cash investments					
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Secretar personable 6 Recensables due from othicities, directoris, frustries, and other dispatibled persons 7 Own near automisenset Executables of the from othicities, directoris, frustries, and other dispatibles due from othicities, directoris, frustries, and other dispatibles of the from othicities, directoris, frustries, and other dispatibles of the from othicities, directoris, frustries, and other dispatibles of the frustries 8 Inventories for sale or use 8 Inventories for sale or use 9 Personal expenses and deferred charges 10a Investments - Use and state government editigations 11a Investments - Use and state government obtained 11 Investments - Comparte bonds 12 Investments - Comparte bonds 13 Investments - Comparte bonds 14 Land, buildings, and equipment basis 15 Other assets (Generibe P 16 Total assets (For be completed by all inters - see the Instructions, Alke, see page 1, them 1) 16 Total assets (For be completed by all inters - see the Instructions, Alke, see page 1, them 1) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 19 Deferred revenue 20 Lease the motions, executor, evidens, and other diagnatified parrons 21 International Comparts (discribe P) 22 Total liabilities (discribe P) 23 Total liabilities (discribe P) 24 Total liabilities (discribe P) 25 Total liabilities (and lines 37 through 21 26 Permanenty restricted 27 Permanenty restricted 28 Permanenty restricted 29 Permanenty restricted 29 Permanenty restricted 20 Permanenty restricted 20 Permanenty restricted 21 Total net assets or fund balances as underword and the discribed parrons 22 Permanenty restricted 23 Permanenty restricted 24 Permanenty restricted 25 Permanenty restricted 26 Permanenty restricted 27 Permanenty restricted 28 Permanenty restricted 29 Permanenty restricted 20 Permanenty restricted 20 Permanenty re			Less allowance for doubtful accounts					
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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) 25 Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31 26 Permanently restricted 27 Temporarily restricted 28 Permanently restricted 29 Permanently restricted 20 Temporarily restricted 20 Temporarily restricted 21 Temporarily restricted 22 Temporarily restricted 23 Temporarily restricted 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Temporarily restricted 28 Pard-in or capital surplus, or land, bldg, and equipment fund 29 Relation or capital surplus, or land, bldg, and equipment fund 30 Total net assets or fund balances 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 31 Total liabilities and net assets/fund balances 32 Tenter amount from Part I, line 27a 33 Other increases not included in line 2 (itemize) ▶ 34 Add lines 1, 2, and 3 55 Decreases not included in line 2 (itemize) ▶ 55 Decreases not included in line 2 (itemize) ▶ 55 Decreases not included in line 2 (itemize) ▶ 55 Decreases not included in line 2 (itemize) ▶ 56 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 66 443, 054.		18	Grants payable					
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Capital stock, trust principal, or current funds 0 .	alar	l .	· · ·			# T246 4 26 - 37 488 24 57 58 6 77 5 1 \$20.00 0 75 25 545 888 887 526 4 4 127 1		
Capital stock, trust principal, or current funds 0 . 0 .	9 6	26	· Carl					
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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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 O. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30		21	Total liabilities and not assets/fund halances	469.012.	443.054.			
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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 6 443, 054.	3	Othe	rincreases not included in line 2 (itemize)		_3			
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 443,054.	4	Add	ines 1, 2, and 3		4	443,054.		
	5	Decr	eases not included in line 2 (itemize)					
· AAA BE	6	Total	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b), line 30	6			

111,043.

88,750.

8 Enter qualifying distributions from Part XII, line 4

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.

Add lines 5 and 6

7

Fait Capital Gains and Los	sses for lax on investment income				
	d describe the kind(s) of property solo rick warehouse; or common stock, 20	(b) How acquired P - Purchase	(c) Date acquired (mo , day, yr.)	(d) Date sold (mo , day, yr)	
	VANGUARD SHORT TE		D - Donation	(-, -, -, -, -, -, -, -, -, -, -, -, -,	07/02/18
				 	
b 25.817 SHARES V				 	10/01/18
c 2,150.538 SHARI		IVESTMENT GRADE F			10/17/18
		ERM INVESTMENT GR			01/07/19
e 24.056 SHARES V		ERM INVESTMENT GR		ļ	04/01/19
		ESTMENT GRADE FUN		ļ	05/23/19
	ONAGE HOLDINGS CO	DRP	P		06/05/19
h CAPITAL GAINS I	DIVIDENDS				
1					
k	·				
<u> </u>					
m					
n					
0					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale) Gain or (loss) olus (f) minus (g)	
a 267.		272.			-5.
b 270.		275.			-5.
c 20,000.		21,195.			-1,195.
d 250.		254.	<u>-</u>		-4.
e 254.		256.			-2.
f 5,000.		5,055.			-55.
22 107		20,620.			2,567.
g 23,187. h 10,275.		20,0201			10,275.
10,273.					10,2,3.
<u>'</u>					
I.					
<u>k</u>		· 			
<u>m</u>					
n					<u> </u>
Complete only for assets showing	ng gain in column (h) and owned by t	he foundation on 12/31/69	(I) L or	cee (from col. (b))	
(i) F M V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (ı)	Gains (excess	sses (from col. (h)) of col (h) gaın ovei not less than "-0-")	
	as 01 12/3 1/03	over col. (j), if any		·	
<u>a</u>	<u> </u>		· · · · · ·		-5. -5.
<u>b</u>	 				
<u>c</u>					-1,195.
<u>d</u>				<u>.</u>	-4.
<u>e</u>	 				-2.
<u>f</u>					-55.
<u>g</u>					2,567.
h					10,275.
1					
k					
1					
m _.					· · · · · · · · · · · · · · · · · · ·
n					
0					
	r If nam also enter	in Part Lline 7			
2 Capital gain net income or (net ca	pital loss) { If gain, also enter If (loss), enter "-0	-" in Part I, line 7	2		11,576.
3 Net short-term capital gain or (los		, I			
If gain, also enter in Part I, line 8,	column (c)	}			
If (loss), enter "-0-" in Part I, line 8	8	J	2	N/A	

THE JOHN AND CHARLENE ROBERTS FAMILY

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-) 4	0. 295. 0. 295.
Date of ruling or determination letter:	0. 295. 0.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 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	0. 295. 0.
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	0. 295. 0.
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 6 Incompany to thers, enter -0- 5 Incompany to the section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Incompany to the section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Incompany to the section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 6 Incompany to the section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Incompany to the section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 6 Incompany to the section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 6 Incompany to the section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 6 Incompany to the section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 7 Incompany to the section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 8 Incompany to the section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 9 Incompany to the section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	295.
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 2 3 4 970 • 6a 970 •	295.
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 3 4 5 6 970 6 0 6 0 6 0 6 0 6 0 6 0 6 6 0 6 6 6 0 6	295.
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 4 970.	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 5 970. 6b 0.	
6 Credits/Payments: a 2018 estimated tax payments and 2017 overpayment credited to 2018 b Exempt foreign organizations - tax withheld at source 6	295.
a 2018 estimated tax payments and 2017 overpayment credited to 2018 b Exempt foreign organizations - tax withheld at source 6a 970. 6b 0.	
b Exempt foreign organizations - tax withheld at source 6b 0 •	.1
c Tax paid with application for extension of time to file (Form 8868)	
Tax para train approach for extension or time to the (corn coco)	
d Backup withholding erroneously withheld 6d 0.	
	<u>970.</u>
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	
	675.
11 Enter the amount of line 10 to be: Credited to 2019 estimated tax ▶ 675. Refunded ▶ 11 Part VII-A Statements Regarding Activities	0.
	s No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition 1b	X
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?	$\frac{1}{x}$
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:	
(1) On the foundation. \blacktriangleright \$ (2) On foundation managers. \blacktriangleright \$	
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?	X
If "Yes," attach a detailed description of the activities.	
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or	
bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a	X
b If "Yes," has it filed a tax return on Form 990-T for this year? N/A 4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5	X
If "Yes," attach the statement required by General Instruction T	
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:	
By language in the governing instrument, or	
By state legislation that effectively amends the governing instrument so that no mandatory 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.	
	\Box
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	. لــِــــــــــــــــــــــــــــــــــ
year 2018 or the tax year beginning in 2018? See the instructions for Part XIV If "Yes," complete Part XIV	<u> </u>
10 Did any persons become substantial contributors during the tax year? If "Yes " attach a schedule listing their names and addresses 10	I X

• 7

Page 5

Pg	ht VII A: Statements Regarding Activities (continued)			
	,	1. E.	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
• •		1., 1		Х
	section 512(b)(13)? If "Yes," attach schedule. See instructions	11		
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?		l	
	If "Yes," attach statement See instructions	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► N/A			
14	The books are in care of ► DAVID J. WINKOWSKI, ESQUIRE Telephone no ► (484)	323-	134	17
		9355		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here			$\overline{}$
15		N/	/ >	L
	and enter the amount of tax-exempt interest received or accrued during the year			N.
16	At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank,	-	Yes	No
	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
	foreign country			
Pa	int 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.	Sec. 1	Yes	No
1 0	During the year, did the foundation (either directly or indirectly)	74.5.E.		建
14	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No	1400		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X No		- 1	
	(5) Transfer any income or assets to a disqualified person (or make any of either available	50 min 15		
	for the benefit or use of a disqualified person)?			
	(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	12.00		
	termination of government service, if terminating within 90 days.)			
	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
0		46	(1×65%	7.30
		1b	2374	(g) 64
	Organizations relying on a current notice regarding disaster assistance, check here	SECTION .		
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	0.5949 7	Ľa ú	
	before the first day of the tax year beginning in 2018?	1c	04 t=-/3)	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	18 35 g		
	defined in section 4942(j)(3) or 4942(j)(5)).			X
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	2 2 3 2		
	before 2018? Yes X No	803		
	If "Yes," list the years ▶ , , , ,			
h	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	2b	, 644 Dr /	*****
_	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	55 C 30 C	1.888	B. C.
C	in the provisions of section 4942(a)(2) are being applied to any of the years fisted in 2a, list the years here			
	<u> </u>			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
	during the year?		1 TO 1	
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	1, \$5,00 (5%) 5		
	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	1.08		
	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,			en à
	Form 4720, to determine if the foundation had excess business holdings in 2018.) N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	2,50€		128
-	had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		X
		rm 990-	PF	
	•		. /	, _ ,

Page 6

Part VII-B Statements Regarding Activities for Which F	orm 4/20 May Be Re	equired _{(contin}	ued)		
5a During the year, did the foundation pay or incur any amount to:			j	}-∹ Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	n 4945(e))?	Y	es 🗶 No 🏻 🦠		
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indire	ctly,			
any voter registration drive?			es 🔀 No 🖰		
(3) Provide a grant to an individual for travel, study, or other similar purposes	?	Y	es 🗶 No 📳		
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section				
4945(d)(4)(A)? See instructions		Y	es 🗶 No 🏅		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or fo				887. 87. 87. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1.
the prevention of cruelty to children or animals?			es 🗓 No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und		n Regulations			
section 53.4945 or in a current notice regarding disaster assistance? See instru			N/A	5b	8885 (c
Organizations relying on a current notice regarding disaster assistance, check h					
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr					
expenditure responsibility for the grant?	14	/A Y	es 💹 No 🍦		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).					為經
6a Did the foundation, during the year, receive any funds, directly or indirectly, to p	pay premiums on		es X No		
a personal benefit contract?	avannel hannelit annt-nat?	Y(es EAL NO E	\$ \\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	X
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?		a.	6b	A
If "Yes" to 6b, file Form 8870.	holter transportion?		es 🗶 No		
7a At any time during the tax year, was the foundation a party to a prohibited tax s b If "Yes," did the foundation receive any proceeds or have any net income attribution.		۰۰ ب	N/A	7b	<u> </u>
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$			- 147 A	70 	能影响
excess parachute payment(s) during the year?	1,000,000 in remuneration of	[] v	es 🗓 No		
Rant VIII Information About Officers, Directors, Truste	es. Foundation Man		is II NO j	T. (2) 40 (45)	3.35.4.03
Paid Employees, and Contractors	,				
List all officers, directors, trustees, and foundation managers and th	neir compensation.				
	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expo account,	ense
(a) Name and address	to position	(If not paid, enter -0-)	and deferred compensation	allowar	nces
CHARLENE K. ROBERTS	PRESIDENT				
C/O D.J. WINKOWSKI, 30 VALLEY STREAM					
MALVERN, PA 19355	10.00	0.	0.		0.
	SECRETARY				
C/O D.J. WINKOWSKI, 30 VALLEY STREAM					
IALVERN, PA 19355	10.00	0.	0.	ļ	0.
	VICE PRESIDEN	r			
C/O D.J. WINKOWSKI, 30 VALLEY STREAM					_
MALVERN, PA 19355	2.00	0.	0.		0.
• • • • • • • • • • • • • • • • • • • •	TREASURER			l	
C/O D.J. WINKOWSKI, 30 VALLEY STREAM					•
ALVERN, PA 19355	2.00	0.	0.		0.
Compensation of five highest-paid employees (other than those incl	(b) Title, and average	anter NONE."	(d) Contributions to	(e) Expe	ense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deterred	account,	other
NONE	devoted to position		compensation	allowal	ices
HONE					
				 	
				<u> </u>	
					
otal number of other employees paid over \$50,000		i			0
			Form	990-PF ((2018)

0.

All other program-related investments. See instructions.

Total. Add lines 1 through 3

Form 990-PF (2018) FOUNDATION, INC. 23-3101766 Page 8 PartX Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes 1 464,644. a Average monthly fair market value of securities 1a 14,333. b Average of monthly cash balances 1b c Fair market value of all other assets 10 478,977.d Total (add lines 1a, b, and c) 1d e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1e 1c (attach detailed explanation) Acquisition indebtedness applicable to line 1 assets 2 Subtract line 2 from line 1d 3 185 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 471,792 Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4 5 23, 590 Minimum investment return Enter 5% of line 5 [PartiXII Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here \rightarrow \rightarrow and do not complete this part.) 23,590. Minimum investment return from Part X, line 6 295. Tax on investment income for 2018 from Part VI, line 5 2a 2b Income tax for 2018. (This does not include the tax from Part VI.) 295 2c c Add lines 2a and 2b Distributable amount before adjustments. Subtract line 2c from line 1 3 Recoveries of amounts treated as qualifying distributions 4 23.295 Add lines 3 and 4 5 6 Deduction from distributable amount (see instructions) 23, 295 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 [PartiXII] Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes. 88,750. a Expenses, contributions, gifts, etc - total from Part I, column (d), line 26 1a Program-related investments - total from Part IX-B 1b 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 Cash distribution test (attach the required schedule) 3b 88,750. 4

Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

income Enter 1% of Part I, line 27b Adjusted qualifying distributions Subtract line 5 from line 4

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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88,750.

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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				23,295.
2	Undistributed income, if any, as of the end of 2018				
a	Enter amount for 2017 only			0.	
b	Total for prior years				
			0.		
3	Excess distributions carryover, if any, to 2018:	1000 x mx x 202	****** ** ****************************	۸.	·
d	From 2013 59,187.		, ',	1.11 No. 1 (1.11 May 1)	The material control of talendamental diffusion for the first of the f
b	From 2014 71,860.	/ MI/MI/W A W AMAPEPEED MANAGEMENT A 11/A 11/2/MIMIN	(1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		
C	From 2015 32,727.				
d	From 2016 91,754.				
е	From 2017 99,571.				
f	Total of lines 3a through e	355,099.			
4	Qualifying distributions for 2018 from				
	Part XII, line 4: ► \$ 88,750.				
а	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				23,295.
е	Remaining amount distributed out of corpus	65,455.	M/S • 7 SV 7M		
_	Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
	Enter the net total of each column as indicated below.				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	420,554.			
b	Prior years' undistributed income. Subtract				
	line 4b from line 2b		0.		
	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.		
е	Undistributed income for 2017. Subtract line				
	4a from line 2a. Taxable amount - see instr.			0.	
f	Undistributed income for 2018. Subtract				•
	lines 4d and 5 from line 1. This amount must				
	be distributed in 2019				0.
7	Amounts treated as distributions out of				
	corpus to satisfy requirements imposed by				
	section 170(b)(1)(F) or 4942(g)(3) (Election				
	may be required - see instructions)	0.	00 i t (110		t stool qus t
	Excess distributions carryover from 2013	E0 10E			
	not applied on line 5 or line 7	59,187.			
	Excess distributions carryover to 2019	261 267			
	Subtract lines 7 and 8 from line 6a	361,367.			
	Analysis of line 9.			/ ***. / ***	
	Excess from 2014 71,860. Excess from 2015 32,727.				
	24 ==4				
	Excess from 2017 99,571. Excess from 2018 65,455.	· !		ęu.	,

823581 12-11-18

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THE JOHN AND CHARLENE ROBERTS FAMILY 23-3101766 Form 990-PF (2018) FOUNDATION INC. Page 10 N/A Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling **b** Check box to indicate whether the foundation is a private operating foundation described in section 4942(1)(3) or 4942(1)(5) Prior 3 years Tax year 2 a Enter the lesser of the adjusted net (a) 2018 (b) 2017 (c) 2016 (d) 2015(e) Total income from Part I or the minimum investment return from Part X for each year listed **b** 85% of line 2a c Qualifying distributions from Part XII, line 4 for each year listed d Amounts included in line 2c not used directly for active conduct of exempt activities e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c 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 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.) 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 STATEMENT 7 b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest. NONE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here 🕨 [X] if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d a The name, address, and telephone number or email address of the person to whom applications should be addressed: b The form in which applications should be submitted and information and materials they should include. c Any submission deadlines

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

Supplementary Information (continued) Part XV Grants and Contributions Paid During the Year or Approved for Future Payment Recipient If recipient is an individual, Foundation Purpose of grant or show any relationship to contribution Amount status of any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year ST. JOSEPH'S PREPARATORY SCHOOL N/A 501 (C)(3) GRANT TO ANOTHER 1733 W GIRARD AVENUE ORGANIZATION 501(C)(3) ORGANIZATION PHILADELPHIA, PA 19130 1,000. BOYS & GIRLS CLUB OF MARTIN COUNTY N/A 501 (C)(3) THOMAS & MARJORIE 11500 SE LARES AVENUE ORGANIZATION ACCOUNTING SCHOLARSHIP HOBE SOUND, FL 33475 1,000. CARON FOUNDATION N/A 501 (C)(3) GRANT TO ANOTHER 244 EAST 58TH STREET DRGANTZATION 501(C)(3) ORGANIZATION NEW YORK, NY 10022 10,000. HOPE RURAL SCHOOL N/A 501 (C)(3) GRANT TO ANOTHER 15929 SW 150TH STREET DRGANIZATION 501(C)(3) ORGANIZATION INDIANTOWN, FL 34956 1,000. J. WOOD PLATT SCHOLARSHIP TRUST N/A 501 (C)(3) GRANT TO ANOTHER 1974 SPROUL ROAD ORGANIZATION 501(C)(3) ORGANIZATION BROOMALL, PA 19008 3,000. SEE CONTINUATION SHEET(S) 88,750. 3a Total b Approved for future payment NONE 0. Total 3b

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Supplementary Information Part XV Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to Amount status of any foundation manager contribution Name and address (home or business) or substantial contributor recipient THE FRIENDS OF VOLUNTEERS IN MEDICINE N/A 501 (C)(3) GRANT TO ANOTHER ORGANIZATION 501(C)(3) ORGANIZATION CLINIC 417 SE BALBOA AVENUE STUART FL 34994 500. HOPPY'S HOPE TO END HUNTINGTONS N/A 501 (C)(3) GRANT TO ANOTHER DISEASE ORGANIZATION 501(C)(3) 7 MARTINS ROAD ORGANIZATION. 500. NEWTOWN SQUARE, PA 19073 MARTIN COUNTY COMMUNITY FOUNDATION 501 (C)(3) GRANT TO ANOTHER N/A 851 SE MONTEREY COMMONS BLVD brganization 501(C)(3) ORGANIZATION STUART FL 34997 2,500. THOMAS JEFFERSON UNIVERSITY HEALTH N/A 501 (C)(3) JEFFERSON PARKINSON 125 S. 9TH STREET, SUITE 600 ORGANIZATION CARE TO CURE PHILADELPHIA, PA 19107 5,000. MARY'S SHELTER OF THE TREASURE COAST 501 (C)(3) N/A GRANT TO ANOTHER 1033 E. 14TH STREET ORGANIZATION 501(C)(3) ORGANIZATION STUART, FL 34996 7,500. 501 (C)(3) ELS FOR AUTISM N/A GRANT TO ANOTHER DRGANIZATION 18370 LIMESTONE CREEK ROAD 501(C)(3) ORGANIZATION JUPITER, FL 33458 3,000. REAL LIFE CHURCH N/A 501 (C)(3) GRANT TO ANOTHER 1445 SW HIBISCUS STREET ORGANIZATION 501(C)(3) ORGANIZATION PORT ST. LUCIE, FL 34983 750. N/A 501 (C)(3) GRANT TO ANOTHER HOLY CHILD SCHOOL AT ROSEMONT 1344 MONTGOMERY AVENUE ORGANIZATION 501(C)(3) ORGANIZATION ROSEMONT, PA 19010 1,000. N/A 501 (C)(3) GRANT TO ANOTHER SAMARITAN CENTER FOR YOUNG BOYS AND ORGANIZATION 501(C)(3) ORGANIZATION FAMILIES 1490 SE COVE ROAD STUART, FL 34997 4.500. ST. ANDREW'S CATHOLIC CHURCH N/A 501 (C)(3) GRANT TO ANOTHER brganization 501(C)(3) ORGANIZATION 2100 SE COVE ROAD 11,500. STUART, FL 34997 72,750. Total from continuation sheets

3 Grants and Contributions Paid During the Y	ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	Amount
Name and address (home or business)	or substantial contributor	recipient	contribution	
ST. JAMES ALUMNI SCHOLARSHIP FUND	N/A	501 (C)(3)	GRANT TO ANOTHER	
1499 EAST 9TH STREET		ORGANIZATION	501(C)(3) ORGANIZATION	
CRUM LYNNE, PA 19022				6,75
JACOB S. ZWEIG FOUNDATION INC DBA IN	N/A	501 (C)(3)	GRANT TO ANOTHER	
JACOB'S SHOES		ORGANIZATION	501(C)(3) ORGANIZATION	
5431 NW 15TH STREET, SUITE #10 MARGATE , FL 33063				1,00
UNITED WAY OF MARTIN COUNTY	N/A	501 (C)(3)	GRANT TO ANOTHER	
10 SE CENTRAL PARKWAY #101		ORGANIZATION	501(C)(3) ORGANIZATION	
STUART, FL 34994				25,00
FRIENDS OF AVALON FIRE DEPARTMENT PO BOX 361	N/A			
AVALON, NJ 08202		DRGANIZATION	DUT(C)(3) ORGANIZATION	25
,				
HUMANE SOCIETY OF TREASURE COAST	N/A	501 (C)(3)	GRANT TO ANOTHER	
4100 SW LEIGHTON FARM AVENUE		ORGANIZATION	501(C)(3) ORGANIZATION	
PALM CITY, FL 34990			+	1,00
MENDLE DEIM HAVAN DADDADADA GENMED	N1 / 2	E01 (C)(3)	CRANT TO ANOTHER	
TEMPLE BEIT HAYAN RAPPAPORT CENTER 951 SE MONTEREY COMMONS BLVD.	N/A	l .		
STUART , FL 34996				1,00
JAMES W. FOLEY LEGACY FOUNDATION	N/A	501 (C)(3)	GRANT TO ANOTHER	
PO BOX 1678		ORGANIZATION	501(C)(3) ORGANIZATION	4 00
ROCHESTER , NH 03866	show any felationship to any foundation manager or substantial contributor or substantial contributor status of recipient stat	1,00		
		1	- I	

orm 990-PF (2018) THE JOHN AND C FOUNDATION, IN		OBERTS FAM	ILY	23-3	101766 Page 12
Part XVI-A Analysis of Income-Produ	cing Activities	5			
Inter gross amounts unless otherwise indicated.	Unrelated b	usiness income	Excluded b	y section 512, 513, or 514	(e)
	(a) Business	(b) Amount	(C) Exclu- sion	(d) Amount	Related or exempt function income
1 Program service revenue	code	-	code		
a			 		
b					
d					
Δ			 		
1					
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	8,868.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property			<u> </u>		<u>-</u> .
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other			18	11,576.	
than inventory Net income or (loss) from special events			-	11,570.	
Gross profit or (loss) from sales of inventory					
1 Other revenue:					
a					
b		_		***	
C					
d	1 1				
e					
2 Subtotal. Add columns (b), (d), and (e)		0.		20,444.	0.
3 Total Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations)				13	20,444.
Part XVI-B Relationship of Activities t	o the Accom	olishment of Exe	empt Pu	rposes	
Line No Explain below how each activity for which income	ome is reported in co	nlumn (e) of Part XVI-A	contributed	importantly to the accompl	ishment of
the foundation's exempt purposes (other than					

ne No	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes)
	the technique of oxidity purposed (enter than by providing technique)
ĺ	
ļ	

Form 990-PF		ATION, INC.	<u>.</u>		23-310		Page 13
Part XVII	Information Re Exempt Organ	egarding Transfers to a iizations	and Transactions ar	nd Relationshi	ps With Nonchari	table	
1 Did the d	organization directly or indi	rectly engage in any of the following	ng with any other organization	on described in sectio	on 501(c)	Ye	s No
		nizations) or in section 527, relatin					
	, •	ation to a noncharitable exempt or	gamzanon oi.			4.(4)	+
(1) Cas						1a(1)	X
	er assets					1a(2)	X
	insactions					11.43	 v
	es of assets to a noncharita	, -				1b(1)	X
• •		ncharitable exempt organization				1b(2)	X
• •	tal of facilities, equipment,					1b(3)	X
• •	nbursement arrangements					1b(4)	$\frac{\lambda}{X}$
• •	ns or Ioan guarantees	ambarahia ar fuadraiaina agliaitatu				1b(5)	X
• •		embership or fundraising solicitation				1b(6)	$\frac{x}{x}$
 c Sharing of facilities, equipment, mailing lists, other assets, or paid employees 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, 							
		oundation. If the foundation receiv	• •				
		other assets, or services received.		o in any tranoaotron t	or origining arrangement, o		
(a) Line no	(b) Amount involved	(c) Name of noncharitabl	e exempt organization	(d) Description	of transfers, transactions, and	sharing arranger	nents
		N/A			,		
							
	• •						
	_						.
			112.2	<u> </u>			
ın sectio	•	tly affiliated with, or related to, one n 501(c)(3)) or in section 527? edule	e or more tax-exempt organi	zations described		Yes [X No
<u> </u>	(a) Name of org		(b) Type of organization	(c) Description of relations	hip	
	N/A				•	•	
	_						
Linds	or possition of porsity I declare t	that I have examined this return, including	a accompanyung sebadular and st	atoments, and to the beel	of my knowledge		
		nplete Declaration of preparer (other than			s any knowledge Ma rete	y the IRS discus urn with the prep	oarer
Here	Charlon	a. K. Roberto		16/2	1 (<i>a 1</i> (a) -	Wn below? See	Instr No
Sic	nature of officer or trustee	-/\ 1 W 1721 W	Derte	Title	`* { 	<u> </u>	
	Print/Type preparer's na				Check If PTIN		
		\\ \ \(\) \(\)	r-/		self- employed		
Paid	DAVID J. W	10/21/2019		122030	5		
Preparer			TEVENS & YOUN	WG. LLP	Firm's EIN ► 23-1		
Use Only							
	Firm's address ► 30	VALLEY STREAM	PARKWAY				
	MA_	LVERN, PA 19355				640-5	
				F	orm 990-P	F (2018)	

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Name of the organization

Schedule of Contributors

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

THE JOHN AND CHARLENE ROBERTS FAMILY

FOUNDATION, INC.

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

► Go to www.irs.gov/Form990 for the latest information.

OMB No 1545 0047

2018

Employer identification number

23-3101766

Schedule B (Form 990, 990-EZ, or 990-PF) (2018)

Organız	atıon type (check o	ne)
Filers of	f:	Section:
Form 99	0 or 990-EZ	501(c)() (enter number) organization
		4947(a)(1) nonexempt charitable trust not treated as a private foundation
		527 political organization
Form 99	0-PF	X 501(c)(3) exempt private foundation
		4947(a)(1) nonexempt charitable trust treated as a private foundation
		501(c)(3) taxable private foundation
		s covered by the General Rule or a Special Rule . 7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions
General	Rule	
X	_	n filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.
Special	Rules	
	sections 509(a)(1) a any one contributo	described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under 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 r, 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, line 1 Complete Parts I and II
	year, total contribu	described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the tions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the ty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address),
	year, contributions is checked, enter h purpose Don't con	exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box ere the total contributions that were received during the year for an exclusively religious, charitable, etc., inplete any of the parts unless the General Rule applies to this organization because it received nonexclusively etc., etc., contributions totaling \$5,000 or more during the year.
but it m i	ust answer "No" on	at isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), 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 ne filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization
THE JOHN AND CHARLENE ROBERTS FAMILY
FOUNDATION, INC.

Employer identification number

23-3101766

Part I	Contributors (see instructions) Use duplicate copies of Part I if additional space is needed				
(a)	(b)	(c)	(d)		
No.	Name, address, and ZIP + 4	Total contributions	Type of contribution		
1	JOHN AND CHARLENE ROBERTS 1933 SE TALBOT PLACE STUART, FL 34997	\$50,000.	Person X Payroll Noncash (Complete Part II for noncash contributions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution		
		\$	Person Payroll Oncash Occupiete Part II for noncash contributions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution		
		\$	Person Payroll Occupate Part II for noncash contributions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution		
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution		
		\$	Person Payroll Oncash Ocomplete Part II for noncash contributions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution		
		\$	Person Payroll Oncash Occash (Complete Part II for noncash contributions)		

Name of organization
THE JOHN AND CHARLENE ROBERTS FAMILY
FOUNDATION, INC.

Employer identification number
23-3101766

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

Employer identification number Name of organization THE JOHN AND CHARLENE ROBERTS FAMILY 23-3101766 FOUNDATION, 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 into once) Use duplicate copies of Part III if additional space is needed (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. (d) Description of how gift is held from (b) Purpose of gift (c) Use of gift Part I (e) Transfer of gift Relationship of transferor to transferee Transferee's name, address, and ZIP + 4 (a) No. from (d) Description of how gift is held (c) Use of gift (b) Purpose of gift Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. (d) Description of how gift is held from (c) Use of gift (b) Purpose of gift Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

FORM 990-PF	DIVIDENDS	AND INTER	EST FROM SECU	RITIES S'	ГАТЕМЕНТ 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	REVENUE	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
VANGUARD EXPLORER FUND	75.		0. 75	. 75.	
VANGUARD FEDERAL MONEY MARKET VANGUARD	1,958.				
INTERMEDIATE TERM INVESTMENT GRADE FUND VANGUARD	3,510.		0. 3,510	. 3,510.	
INTERNATIONAL GROWTH FUND	3,696.	2,49	7. 1,199	. 1,199.	
VANGUARD PRIMECAP FUND VANGUARD SHORT	2,815.	2,36	0. 455	. 455.	
TERM INVESTMENT GRADE FUND	93.		0. 93	. 93.	
VANGUARD STRATEGIC EQUITY FUND VANGUARD TOTAL	1,338.	1,15	0. 188	. 188.	
BOND MARKET INDEX FUND	2,063.		0. 2,063	. 2,063.	
VANGUARD WINDSOR II FUND	3,595.	2,69	5. 900	900.	
TO PART I, LINE 4	19,143.	10,27	8,868	8,868.	
FORM 990-PF		LEGAL	FEES	S	PATEMENT 2
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES		4,650.	4,650.		0.
TO FM 990-PF, PG 1, LN 16A		4,650.	4,650.		0.

OTHER PROFESSIONAL FEES		STATEMENT 3	
(A) EXPENSES PER BOOKS			(D) CHARITABLE PURPOSES
1,056.	1,056.		0.
1,056.	1,056.		0.
TAX	ES	S	FATEMENT 4
(A) EXPENSES PER BOOKS			(D) CHARITABLE PURPOSES
976. 970.	0. 0.		0. 0.
	(A) EXPENSES PER BOOKS 1,056. 1,056. TAX (A) EXPENSES	(A) (B) EXPENSES NET INVEST- PER BOOKS MENT INCOME 1,056. 1,056. 1,056. 1,056. TAXES (A) (B) EXPENSES NET INVEST-	(A) (B) (C) EXPENSES NET INVEST- ADJUSTED PER BOOKS MENT INCOME 1,056. 1,056. 1,056. 1,056. TAXES S' (A) (B) (C) EXPENSES NET INVEST- ADJUSTED

FORM 990-PF CORPORATE STOCK		STATEMENT 5
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
VONAGE HOLDINGS CORP	65,118.	71,560.
TOTAL TO FORM 990-PF, PART II, LINE 10B	65,118.	71,560.

FORM 990-PF	OTHER	INVESTMENTS		STATEMENT 6
DESCRIPTION		VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
VANGUARD WINDSOR II FUND		COST	39,932.	39,349.
VANGUARD STRATEGIC EQUITY FUND		COST	14,425.	16,799.
VANGUARD EXPLORER FUND		COST	16,697.	20,120.
VANGUARD INTERMEDIATE TERM		COST		
INVESTMENT GRADE FUND			98,216.	99,234.
VANGUARD SHORT TERM INVESTMENT		COST		
GRADE FUND			2,811.	2,832.
VANGUARD PRIMECAP FUND		COST	35,825.	40,953.
VANGUARD TOTAL BOND MARKET INDE	ΣX	COST		
FUND			73,969.	75,521.
VANGUARD INTERNATIONAL GROWTH B	FUND	COST	71,324.	83,773.
TOTAL TO FORM 990-PF, PART II,	LINE 3	13	353,199.	378,581.

		-
FORM 990-PF	PART XV - LINE 1A	STATEMENT 7
	LIST OF FOUNDATION MANAGERS	

NAME OF MANAGER

CHARLENE K. ROBERTS JOHN J. ROBERTS