

Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

2018

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

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For calendar year 2018 or tax year beginning 7/1/2018, and ending 6/30/2019

Name of foundation MYRA FRIEDMAN FAMILY FOUNDATION			A Employer identification number 45-5400144	
Number and street (or PO box number if mail is not delivered to street address) 2816 SILVERLEAF LANE		Room/suite		
City or town, state or province, country, and ZIP or foreign postal code NAPLES FL 34105		B Telephone number (see instructions) 239-659-1055		
Foreign country name		Foreign province/state/country		Foreign postal code
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 04 ☐ 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) ▶ \$ 1,503,687		J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____		
C If exemption application is pending, check here ☐ 6 D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐ E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐				

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				
	4 Dividends and interest from securities	142,851	142,851		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	13,810			
	b Gross sales price for all assets on line 6a 124,392				
	7 Capital gain net income (from Part IV, line 2)		13,810		
	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	156,661	156,661	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,500	2,500		
	c Other professional fees (attach schedule)				
	17 Interest	19	19		
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	8,321	8,321		
	24 Total operating and administrative expenses. Add lines 13 through 23	10,840	10,840	0	0
	25 Contributions, gifts, grants paid	108,659			108,659
26 Total expenses and disbursements. Add lines 24 and 25	119,499	10,840	0	108,659	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	37,162				
b Net investment income (if negative, enter -0-)		145,821			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

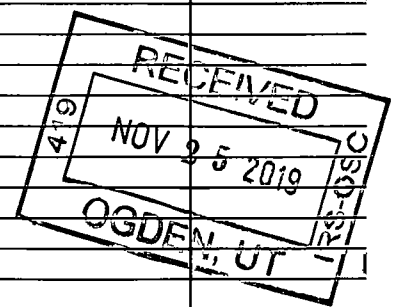
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Form **990-PF** (2018)

14

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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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	10,056	15,265	15,265
	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)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	1,443,749	1,475,702	1,488,422
	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)	1,453,805	1,490,967	1,503,687
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			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	1,453,805	1,490,967	
	30 Total net assets or fund balances (see instructions)	1,453,805	1,490,967	
	31 Total liabilities and net assets/fund balances (see instructions)	1,453,805	1,490,967	

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	1,453,805
2 Enter amount from Part I, line 27a	2	37,162
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	1,490,967
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,490,967

Part IV Capital Gains and Losses for Tax on Investment Income

a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a See Attached Statement				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	13,810	
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	0	

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

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

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

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

☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	92,990	1,600,013	0.058118
2016	87,751	1,496,638	0.058632
2015	83,274	1,445,428	0.057612
2014	84,189	1,612,778	0.052201
2013	89,929	1,616,285	0.055639
2 Total of line 1, column (d)		2	0.282202
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	0.056440
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5		4	1,507,457
5 Multiply line 4 by line 3		5	85,081
6 Enter 1% of net investment income (1% of Part I, line 27b)		6	1,458
7 Add lines 5 and 6		7	86,539
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		8	108,659

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	1,458	
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	1,458	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,458	
6	Credits/Payments			
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	18	
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7	18	
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	10	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	1,450	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	0	
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ☐ Refunded ☐	11	0	

Part VII-A Statements Regarding Activities

	Yes	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. 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		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____		
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		X
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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i>		
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?	X	
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	X	
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 <i>General Instruction G</i> ? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV	X	
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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		Yes	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			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A		X	
14	The books are in care of ► MYRA FRIEDMAN Telephone no ► 239-659-1055 Located at ► 2816 SILVERLEAF LANE NAPLES FL ZIP+4 ► 34105-3032			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—check here and enter the amount of tax-exempt interest received or accrued during the year ► 15			
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 ►		Yes	No
		16		X

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

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

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	N/A	
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		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? ☐ Yes ☒ No If "Yes," list the years ► 20 , 20 , 20 , 20			
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	N/A	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 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	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		X

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	N/A
	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?	☐ Yes ☐ No		
	If "Yes," attach the statement required by Regulations section 53.4945–5(d)			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	X
	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		
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	N/A
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	☐ Yes ☒ No		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, and foundation managers and their compensation. 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
MYRA FRIEDMAN 2816 SILVERLEAF LANE NAPLES, FL 34105-3032	TRUSTEE 1 00	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



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		▶

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (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	
2	
All other program-related investments. See instructions	
3	
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	1,519,332
b	Average of monthly cash balances	1b	11,081
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	1,530,413
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	1,530,413
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see instructions)	4	22,956
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,507,457
6	Minimum investment return. Enter 5% of line 5	6	75,373

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	75,373
2a	Tax on investment income for 2018 from Part VI, line 5	2a	1,458
b	Income tax for 2018 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	1,458
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	73,915
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	73,915
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	73,915

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	108,659
b	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	
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	108,659
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	1,458
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	107,201

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				73,915
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____				
3 Excess distributions carryover, if any, to 2018				
a From 2013	11,921			
b From 2014	6,767			
c From 2014	12,971			
d From 2016	14,021			
e From 2017	15,003			
f Total of lines 3a through e	60,683			
4 Qualifying distributions for 2018 from Part XII, line 4 ► \$ 108,659				
a Applied to 2017, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2018 distributable amount				73,915
e Remaining amount distributed out of corpus	34,744			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	95,427			
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				
d Subtract line 6c from line 6b Taxable amount—see instructions				
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)				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)	11,921			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	83,506			
10 Analysis of line 9				
a Excess from 2014	6,767			
b Excess from 2014	12,971			
c Excess from 2016	14,021			
d Excess from 2017	15,003			
e Excess from 2018	34,744			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

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 5/1/2012

b Check box to indicate whether the foundation 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	
			300	300
			255	255
	108,659	93,997	88,302	375,216
				0
	108,659	93,997	88,302	375,216
	50,249	53,334	49,888	201,652

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 0

(2) Value of assets qualifying under section 4942(j)(3)(B)(i) 0

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) 0

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) 0

(3) Largest amount of support from an exempt organization 0

(4) Gross investment income 0

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))
- 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 email address of the person to whom applications should be addressed

MYRA FRIEDMAN 2816 SILVERLEAF LANE NAPLES, FL 34105-3032 239-659-1055

- b** The form in which applications should be submitted and information and materials they should include

LETTER APPLICATION WITH SPECIFIC PURPOSE AND MONEY REQUESTS

- 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

N/A

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year Anti-Defamation League 1500 Market Street, Suite 2415 Philadelphia, PA 19102 Artis Naples 5833 Pelican Bay Boulevard Naples, FL 34108 Champions for Learning 3606 Enterprise Avenue, Suite 150 Naples, FL 34104 Children's Hospital of Philadelphia 3401 Civic Center Boulevard Philadelphia, PA 19104 Collier County 100 Club P O Box 2008 Naples, FL 34106 Community Foundation of Collier County 1110 Pine Ridge Road, Suite 200 Naples, FL 34108 Congregation Kol Ami 8201 High School Road Elkins Park, PA 19027 Conservancy of Southwest Florida 1495 Smith Preserve Way Naples, FL 34102 Eluna 1617 JFK Boulevard Philadelphia, PA 19103 Environmental Defense Fund 257 Park Avenue South New York, NY 10010 Fresh Start 4445 17th Court SW Naples, FL 34116		PC PC PC PC PC PC PC PC PC	UNRESTRICTED CHARITABLE GIFT UNRESTRICTED CHARITABLE GIFT UNRESTRICTED CHARITABLE GIFT UNRESTRICTED CHARITABLE GIFT UNRESTRICTED CHARITABLE GIFT UNRESTRICTED CHARITABLE GIFT UNRESTRICTED CHARITABLE GIFT UNRESTRICTED CHARITABLE GIFT	500 2,500 6,000 430 200 20,500 2,855 135 4,000 430 1,000
Total See Attached Statement			▶ 3a	108,659
b Approved for future payment				
Total			▶ 3b	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	142,851	
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory				13,810	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)		0		156,661	0
13	Total. Add line 12, columns (b), (d), and (e)				13	156,661

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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

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

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

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☐ No
- b** If "Yes," complete the following schedule

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

**Sign
Here**

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

Signature of officer or trustee Mary M. Friedman Date 11-7-19 Title Rep. Porters

May the IRS discuss this return with the preparer shown below?
See instructions ☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

GERARD J KRETZ, EA

Preparer's signature

[Signature]
ATES LLC

Date _____

11/9/19	Fire
---------	------

Check ☐ if self-employed

PTIN

P00645468

Firm's name ▶ R D HOAG & ASSOCIATES LLC

Firm's EIN ▶ 82-3685723

Firm's address ► 555 NORTH BELL AVE , SUITE 100, CARNEGIE, PA 15106

Phone no	412-278-1600
----------	--------------

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

Folds of Honor

Street

8551 N 125th East Avenue, Suite 100

City

Owasso

State

OK

Zip Code

74055

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

250

Name

Grey Oaks Team Member Educational Advancement

Street

2400 Grey Oaks Drive North

City

Naples

State

FL

Zip Code

34105

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

250

Name

Gulfshore Playhouse

Street

1010 5th Avenue South, Suite 205

City

Naples

State

FL

Zip Code

34102

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

300

Name

Hadassah, The Women's Zionist Organization of America

Street

40 Wall Street

City

New York

State

NY

Zip Code

10005

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

5,000

Name

Harry Chapin Food Bank of Southwest Florida

Street

3760 Fowler Strret

City

Fort Meyers

State

FL

Zip Code

33901

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

100

Name

Holocaust Museum & Ed Ctr of Southwest Florida

Street

4760 Tamiami Trail, Suite 7

City

Naples

State

FL

Zip Code

34103

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

600

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

Howard Levin Clubhouse

Street

2621 Murray Avenue

City

Pittsburgh

State

PA

Zip Code

15217

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

50

Name

Humane Society Naples

Street

370 Airport-Pulling Road North

City

Naples

State

FL

Zip Code

34104

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

100

Name

Jewish Federation of Greater Naples

Street

2500 Vanderbilt Beach Road

City

Naples

State

FL

Zip Code

34109

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

18,815

Name

Jewish Historical Society of Southwest Florida

Street

889 Vanderbilt Beach Road

City

Naples

State

FL

Zip Code

34108

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

54

Name

Jewish National Fund

Street

42 East 69th Street

City

New York

State

NY

Zip Code

10021

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

3,000

Name

Lighthouse of Collier County

Street

2685 Horseshoe Drive South

City

Naples

State

FL

Zip Code

34104

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

900

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

Make A Wish Foundation

Street

5 Valley Square, Suite 210

City

Blue Bell

State

PA

Zip Code

19422

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

500

Name

Mazon

Street

10850 Wilshire Boulevard, Suite 400

City

Los Angeles

State

CA

Zip Code

90024

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

100

Name

Meals For Hope

Street

2221 Corporation Boulevard

City

Naples

State

FL

Zip Code

34109

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

100

Name

Montgomery County SPCA

Street

19 East Ridge Pike

City

Conshohocken

State

PA

Zip Code

19428

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

430

Name

Naples Senior Center @ JFCS

Street

5025 Castello Drive

City

Naples

State

FL

Zip Code

34103

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

10,900

Name

Parkinson Association of Southwest Florida

Street

5926 Premier Way, Suite 114

City

Naples

State

FL

Zip Code

34109

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

1,500

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

Salvation Army

Street

3180 Estey Avenue

City

Naples

State

FL

Zip Code

34101

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

100

Name

Shelter for Abused Women & Children

Street

P O Box 10102

City

Naples

State

FL

Zip Code

34101

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

5,000

Name

Southern Poverty Law Center

Street

400 Washington Avenue

City

Montgomery

State

AL

Zip Code

36104

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

430

Name

Speak For The Unspoken

Street

P O Box 534

City

Grove City

State

OH

Zip Code

43123

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

430

Name

Temple Shalom

Street

4630 Pine Rdg Rd

City

Naples

State

FL

Zip Code

34119

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

15,200

Name

Theatre Zone

Street

13275 Livingston Road

City

Naples

State

FL

Zip Code

34109

Foreign Country**Relationship****Foundation Status**

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

1,000

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

Women's Foudation of Collier County

Street

1110 Pine Ridge Road, Suite 200

City

Naples

State

FL

Zip Code

34108

Foreign Country

Relationship

Foundation Status

PC

Purpose of grant/contribution

UNRESTRICTED CHARITABLE GIFT

Amount

5,000

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Part I, Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

Description	CUSIP #	Check "X" to include in Part IV	Purchaser	Check "X" if Purchaser is a Business	Acquisition Method	Date Acquired	Date Sold	Gross Sales Price	Totals		Cost or Other Basis	Valuation Method	Cost or Other Basis, Expenses, Depreciation and Adjustments		Net Gain or Loss
									Capital Gains/Losses				Depreciation	Adjustments	
									Long Term CG Distributions	Short Term CG Distributions					
Amount										0					13,810
										0					0
1	62 815 Shs Voya Small Cap O	X		X	P	VARIOUS	7/13/2018	4,392	3,978						414
2	1289 324 Shs Sterling Capital	X		X	P	VARIOUS	12/12/2018	25,000	21,405						3,595
3	1084 599 Shs Loomis Sayles S	X		X	P	VARIOUS	1/14/2019	15,000	16,038						-1,038
4	875 657 Shs Templeton Global	X		X	P	VARIOUS	1/14/2019	10,000	10,845						-845
5	1160 991 Shs Columbia Contr	X		X	P	VARIOUS	5/2/2019	30,000	26,379						3,621
6	1923 077 Shs Sterling Capital	X		X	P	VARIOUS	6/25/2019	40,000	31,937						8,063
7															0

Part I, Line 16b (990-PF) - Accounting Fees

		2,500	2,500	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	ACCOUNTING FEES	2,500	2,500		0

Part I, Line 18 (990-PF) - Taxes

		0	0	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	FEDERAL INCOME TAX	0			

Part I, Line 23 (990-PF) - Other Expenses

		8,321	8,321	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	BROKER FEES	8,321	8,321		

Part II, Line 13 (990-PF) - Investments - Other

		1,443,749		1,475,702		1,488,422
		Basis of Valuation	Book Value Beg. of Year	Book Value End of Year	FMV End of Year	
1	Allegheny Investments		1,443,749	1,475,702	1,488,422	

Amount

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Part VII-A, Line 10 (990-PF) - Substantial Contributors

	Name	Check "X" if Business	Street	City	State	Zip Code	Foreign Country
1	MILLSTEIN CHARITABLE FOUND		322 ARMBRUST ROAD 2ND FLOOR	YOUNGWOOD	PA	15697-0347	

Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

		Check "X" if Business	Street	City	State	Zip Code	Foreign Country	Title	Avg Hrs Per Week	Compensation	Benefits	Expense Account
1	MYRA FRIEDMAN		2816 SILVERLEAF LANE	NAPLES	FL	34105-3032		TRUSTEE	1 00	0		