

For calendar year 2018, or tax year beginning 07-01-2018, and ending 06-30-2019

Name of foundation HOWARD AND GERALDINE POLINGER FAMILY FOUNDATION		A Employer identification number 52-6078041	
Number and street (or P O box number if mail is not delivered to street address) 1301 CONNECTICUT AVENUE NW NO 450		Room/suite	B Telephone number (see instructions) (202) 888-6833
City or town, state or province, country, and ZIP or foreign postal code WASHINGTON, DC 20036		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 60,715,806	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	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)	5,415,484			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	4,831	4,831		
	4 Dividends and interest from securities	748,926	748,926		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	854,570			
	b Gross sales price for all assets on line 6a _____ 5,554,221				
	7 Capital gain net income (from Part IV, line 2)		854,570		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	609,562	605,640		
	12 Total. Add lines 1 through 11	7,633,373	2,213,967		
	13 Compensation of officers, directors, trustees, etc	144,000	0		144,000
	14 Other employee salaries and wages	167,371	0		167,371
	15 Pension plans, employee benefits	34,279	0		34,279
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	31,974	7,994		23,981
	c Other professional fees (attach schedule)	192,159	171,226		20,933
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	58,472	0		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy	62,289	0		62,289
	21 Travel, conferences, and meetings	8,622	0		8,622
	22 Printing and publications				
	23 Other expenses (attach schedule)	106,204	70,059		36,145
	24 Total operating and administrative expenses. Add lines 13 through 23	805,370	249,279		497,620
	25 Contributions, gifts, grants paid	2,173,500			2,173,500
	26 Total expenses and disbursements. Add lines 24 and 25	2,978,870	249,279		2,671,120
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	4,654,503			
	b Net investment income (if negative, enter -0-)		1,964,688		
c Adjusted net income (if negative, enter -0-)					

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	319,510	100,021	100,021
	2 Savings and temporary cash investments	293,038	300,495	300,495
	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)	158,891	302,187	302,187
	b Investments—corporate stock (attach schedule)	16,176,579	4,376,363	4,376,363
	c Investments—corporate bonds (attach schedule)	911,790	932,387	932,387
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	37,190,998	53,672,672	54,690,317
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	14,036	14,036	14,036	
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	55,064,842	59,698,161	60,715,806	
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	0	0	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29 Retained earnings, accumulated income, endowment, or other funds	55,064,842	59,698,161	
30 Total net assets or fund balances (see instructions)	55,064,842	59,698,161		
31 Total liabilities and net assets/fund balances (see instructions) .	55,064,842	59,698,161		

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	55,064,842
2 Enter amount from Part I, line 27a	2	4,654,503
3 Other increases not included in line 2 (itemize) ▶ _____	3	124,417
4 Add lines 1, 2, and 3	4	59,843,762
5 Decreases not included in line 2 (itemize) ▶ _____	5	145,601
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	59,698,161

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a See Additional Data Table				
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 See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
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	854,570
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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



Yes



No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017	2,704,309	53,073,859	0 050954
2016	2,810,670	48,205,816	0 058306
2015	2,314,791	47,825,558	0 048401
2014	2,185,829	47,951,919	0 045584
2013	1,996,830	43,317,400	0 046098
2 Total of line 1, column (d)			2 0 249343
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 049869
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4 55,707,626
5 Multiply line 4 by line 3			5 2,778,084
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 19,647
7 Add lines 5 and 6			7 2,797,731
8 Enter qualifying distributions from Part XII, line 4			8 2,671,120

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	39,294
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	39,294
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	39,294
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	45,553
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	45,553
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	6,259
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ☐ 6,259 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?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ 0 (2) On foundation managers ☐ \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ MD		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV	9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 	10	Yes

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>POLINGERFOUNDATION.ORG</u>	13	Yes	
14	The books are in care of ► <u>GMA FOUNDATIONS</u> Telephone no ► <u>(617) 426-7080</u>			

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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?	16	Yes	No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ►			

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.	1b		No
	Organizations relying on a current notice regarding disaster assistance check here.			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018?		☐ 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		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?		☐ Yes ☒ No	
b	If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		No

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

5a	During the year did the foundation pay or incur any amount to		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	☐ Yes ☒ No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.		5b	
	Organizations relying on a current notice regarding disaster assistance check here.	☒		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ 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	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			
	If "Yes" to 6b, file Form 8870			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No	7b	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	☐ Yes ☒ No		

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

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
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
JULIA LIPTON	PROGRAM OFFICER	100,588	2,404	0
1301 CONNECTICUT AVENUE NW WASHINGTON, DC 200361877	40 00			
ELIZABETH SPAGNOLETTI-HECKER	GRANTS AND OPERATION	62,450	1,628	0
1301 CONNECTICUT AVENUE NW WASHINGTON, DC 200361877	40 00			
Total number of other employees paid over \$50,000.				0

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

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
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	
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	56,144,418
b	Average of monthly cash balances.	1b	411,547
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	56,555,965
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	56,555,965
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	848,339
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	55,707,626
6	Minimum investment return. Enter 5% of line 5.	6	2,785,381

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	2,785,381
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	39,294
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	39,294
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	2,746,087
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,746,087
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	2,746,087

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	2,671,120
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	2,671,120
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,671,120

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				2,746,087
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			1,733,001	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013.				
b From 2014.				
c From 2015.				
d From 2016.				
e From 2017.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 2,671,120				
a Applied to 2017, but not more than line 2a			1,733,001	
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.				938,119
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				1,807,968
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2014.				
b Excess from 2015.				
c Excess from 2016.				
d Excess from 2017.				
e Excess from 2018.				

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. ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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

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

c Any submission deadlines

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

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

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

Enter gross amounts unless otherwise indicated

13 Total. Add line 12, columns (b), (d), and (e).	13	2,217,889
(See worksheet in line 13 instructions to verify calculations)		

[illegible]

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

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.

Sign Here	*****	2019-10-25	*****	May the IRS discuss this return with the preparer shown below? (see instr)? ☐ Yes ☐ No
	Signature of officer or trustee	Date	Title	

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00950491	
	Firm's name ▶ GMA FOUNDATIONS					Firm's EIN ▶
	Firm's address ▶ 2 LIBERTY SQUARE SUITE 500 BOSTON, MA 02109					Phone no (617) 426-7080

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1	JP MORGAN	P	2018-06-03	2019-06-03
1	JP MORGAN	P	2018-06-07	2019-06-07
	KODIAK FUNDING, LP WRITE DOWN	P	2018-06-30	2019-06-30
	MRA SCHWAB	P	2017-12-28	2019-06-26
	HAWTHORNE	P	2018-05-31	2019-05-31
	CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
1,454,374		1,424,647	29,727
873,699		863,219	10,480
1,128			1,128
1,070,151		1,107,477	-37,326
1,759,594		1,304,308	455,286
395,275			395,275

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			29,727
			10,480
			1,128
			-37,326
			455,286
			395,275

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
LORRE BETH POLINGER	PRESIDENT 5 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				
ARNOLD LEE POLINGER	DIRECTOR 1 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				
DAVID MARC POLINGER	TREASURER 1 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				
ERICA PRESSMAN	SECRETARY/CHIEF EXEC OFFIC 32 00	144,000	4,185	0
1301 CONNECTICUT AVENUE NW WASHINGTON, DC 200361877				
JENNIFER ABRAMS	DIRECTOR 1 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				
MOLLIE BARNATHAN	DIRECTOR 1 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				
JAN POLINGER CHAVIS	DIRECTOR 1 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				
CHARLIE POLINGER	DIRECTOR 1 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				
STEVEN POLINGER	DIRECTOR 1 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				
BECKY POLINGER	DIRECTOR 1 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				
JULIE POLINGER	DIRECTOR 1 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				
JOSHUA WERTLIEB	VICE PRESIDENT 1 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				
MIRIAM NSIMBI	DIRECTOR 1 00	0	0	0
5530 WISCONSIN AVENUE SUITE 1000 CHEVY CHASE, MD 20815				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
350ORG20 JAY ST STE 732 BROOKLYN, NY 11201	NONE	PC	GENERAL OPERATING SUPPORT	14,000
ACTION FOR BOSTON COMMUNITY DEVELOPMENT 178 TREMONT STREET BOSTON, MA 02111	NONE	PC	SUMMERWORKS PROGRAM	7,500
AMERICAN CIVIL LIBERTIES UNION FOUNDATION 125 BROAD STREET 18TH FLOOR NEW YORK, NY 10004	NONE	PC	GENERAL OPERATING SUPPORT	11,500
Total ► 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN JEWISH JOINT DISTRIBUTION COMMITTEE 220 E 42ND ST NEW YORK, NY 10017	NONE	PC	UKRAIN CRISIS RELIEF, ROMANIAN FAMILY CAMPS, AND LEATID EUROPEAN CENTER	82,500
ATLAS PERFORMING ARTS CENTER 1333 H ST NE WASHINGTON, DC 20002	NONE	PC	INTERSECTIONS FESTIVAL 2020	25,000
BENDER JEWISH COMMUNITY CENTER OF GREATER WASHINGTON 6125 MONTROSE ROAD ROCKVILLE, MD 20852	NONE	PC	GENERAL OPERATING SUPPORT	5,000
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BETH JOSEPH CONGREGATION OF GREATER PHOENIX 515 EAST BETHANY HOME ROAD PHOENIX, AZ 85012	NONE	PC	BUILDING CAMPAIGN	4,000
BUILDING BRIDGES ACROSS THE RIVER 1901 MISSISSIPPI AVE SE WASHINGTON, DC 20020	NONE	PC	ARTS4ALL AND ICAN TECHNICAL THEATER INTERNSHIP	90,000
CAMERAPO BOX 35040 BOSTON, MA 021350001	NONE	PC	GENERAL OPERATING SUPPORT	9,500
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CAPITAL AREA FOOD BANK 4900 PUERTO RICO AVENUE NE WASHINGTON, DC 20017	NONE	PC	GENERAL OPERATING SUPPORT	4,000
CHILDREN'S NATIONAL HEALTH SYSTEM 111 MICHIGAN AVE NW WASHINGTON, DC 20010	NONE	PC	EARLY CHILDHOOD MENTAL HEALTH IN PRIMARY CARE	195,000
CONGREGATION B'NAI TZEDEK 10621 SOUTH GLEN ROAD POTOMAC, MD 20854	NONE	PC	GENERAL OPERATING SUPPORT	5,000
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DANCE PLACE3225 8TH ST NE WASHINGTON, DC 20017	NONE	PC	GENERAL OPERATING SUPPORT	100,000
DC SCORES 1140 CONNECTICUT AVE NW STE 1200 WASHINGTON, DC 20036	NONE	PC	GENERAL OPERATING SUPPORT	3,000
EAST VALLEY JEWISH COMMUNITY CENTER 908 N ALMA SCHOOL RD CHANDLER, AZ 85224	NONE	PC	GENERAL OPERATING SUPPORT	1,800
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
EDLAVITCH DC JEWISH COMMUNITY CENTER 1529 16TH ST NW WASHINGTON, DC 20036	NONE	PC	WASHINGTON JEWISH MUSIC FESTIVAL, POLINGER ENDOWMENT, AND GENERAL OPERATING SUPPORT	277,500
FJC452 5TH AVE 24TH FL NEW YORK, NY 11105	NONE	PC	HIDDEN SPARKS POLINGER FELLOW INTERNAL COACH PROGRAM	25,000
FLAMBOYAN FOUNDATION 1730 MASSACHUSETTS AVE NW WASHINGTON, DC 20010	NONE	PC	FAMILY ENGAGEMENT EARLY CHILDHOOD RESOURCE DEVELOPMENT	60,000
Total ► 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FROM THE TOP 140 CLARENDON ST STE 301 BOSTON, MA 02116	NONE	PC	"TAKE IT BEYOND THE CONCERT HALL" & ALUMNI LEADERSHIP GRANT	65,000
GATHERDC1817 M ST NW WASHINGTON, DC 20036	NONE	PC	NEW-TO-DC (NEWISH AND JEWISH) INITIATIVE	25,000
GOUCHER COLLEGE 1021 DULANEY VALLEY RD BALTIMORE, MD 21204	NONE	PC	HOWARD AND GERALDINE POLINGER SCHOLARSHIP IN DANCE	30,000
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HALCYON3400 PROSPECT ST NW WASHINGTON, DC 20007	NONE	PC	BY THE PEOPLE 2020 INTERNATIONAL ARTS & CIVIC DIALOGUE FESTIVAL	40,000
HAROLD GRINSPOON FOUNDATION 67 HUNT ST STE 100 AGAWAM, MA 01001	NONE	PC	PJ LIBRARY ALLIANCE	200,000
HASBARA FELLOWSHIPS 313 WEST 83RD STREET NEW YORK, NY 10024	NONE	PC	GENERAL OPERATING SUPPORT	2,500
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HEBREW HOME OF GREATER WASHINGTON 6121 MONTROSE ROAD ROCKVILLE, MD 20852	NONE	PC	CHARLES AND MOLLIE MERICAN ENDOWED FUND	15,000
HUMANE RESCUE ALLIANCE 71 OGLETHORPE STREET NW WASHINGTON, DC 20011	NONE	PC	SOPHIE'S FUND FOR EMERGENCY MEDICAL CARE	4,000
ICIVICS1035 CAMBRIDGE ST STE 21B CAMBRIDGE, MA 02141	NONE	PC	TEACHING CONVERSATIONAL ISSUES RESOURCES AND SUPPORTS FOR TEACHERS	45,000
Total ► 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
IMAGINATION STAGE 4908 AUBURN AVENUE BETHESDA, MD 20814	NONE	PC	GENERAL OPERATING SUPPORT	2,500
JEWISH ADOPTION AND FOSTER CARE OPTIONS 4200 N UNIVERSITY DRIVE SUNRISE, FL 33351	NONE	PC	GROUP HOME PROGRAM	3,000
JEWISH COMMUNITY ALLIANCE OF SOUTHERN MAINE 1342 CONGRESS STREET PORTLAND, ME 04102	NONE	PC	ANNUAL CAMPAIGN, DESIGNATED FOR JEWISH FAMILY SERVICES	2,000
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JEWISH FEDERATION OF GREATER WASHINGTON 6101 EXECUTIVE BLVD STE 100 N BETHESDA, MD 20852	NONE	PC	GENERAL OPERATING SUPPORT	225,000
JEWISH SOCIAL SERVICE AGENCY 200 WOOD HILL ROAD ROCKVILLE, MD 20850	NONE	PC	ADOLESCENT TREATMENT AND OUTREACH ENDOWMENT FUND AND CHILD AND ADOLESCENT MENTAL HEALTH SERVICES	70,000
KRAVIS CENTER FOR THE PERFORMING ARTS 701 OKEECHOBEE BOULEVARD WEST PALM BEACH, FL 33401	NONE	PC	GENERAL OPERATING SUPPORT	3,500
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LEVINE MUSIC2801 UPTON ST NW WASHINGTON, DC 20008	NONE	PC	EXPANDING ACCESS TO MUSIC IN SE DC AND GENERAL OPERATING SUPPORT	22,500
MAINE PUBLIC HEALTH ASSOCIATION 11 PARKWOOD DR AUGUSTA, ME 04330	NONE	PC	GENERAL OPERATING SUPPORT	2,000
MIAMI CITY BALLET 2200 LIBERTY AVENUE MIAMI BEACH, FL 33139	NONE	PC	GENERAL OPERATING SUPPORT	5,000
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MOISHE HOUSE 5007 PROVIDENCE RD STE E216 CHARLOTTE, NC 28226	NONE	PC	MOISHE HOUSE WITHOUT WALLS	120,000
NATIONAL CAPITAL LYME DISEASE ASSOCIATION PO BOX 8211 MCLEAN, VA 221068211	NONE	PC	CHRONIC LYME RESEARCH	7,500
NATIONAL IMMIGRATION LAW CENTER 3450 WILSHIRE BLVD STE 108-62 LOS ANGELES, CA 90010	NONE	PC	GENERAL OPERATING SUPPORT	8,500
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NATIONAL MUSEUM OF AMERICAN JEWISH HISTORY 101 S INDEPENDENCE MALL EAST PHILADELPHIA, PA 19106	NONE	PC	NEW JEWISH CULTURE NETWORK	32,000
PARDES JEWISH DAY SCHOOL 12753 N SCOTTSDALE RD SCOTTSDALE, AZ 85254	NONE	PC	GENERAL OPERATING SUPPORT	5,000
PLANNED PARENTHOOD FEDERATION OF AMERICA ATTN ONLINE SERVICES PO BOX 97166 WASHINGTON, DC 200907166	NONE	PC	GENERAL OPERATING SUPPORT	12,500
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
REFUGEPOINTPO BOX 984001 BOSTON, MA 022984001	NONE	PC	GENERAL OPERATING SUPPORT	1,000
ROCK THE VOTE1440 G ST NW WASHINGTON, DC 20005	NONE	PC	GENERAL OPERATING SUPPORT	30,000
SITAR ARTS CENTER 1700 KALORAMA RD NW STE 101 WASHINGTON, DC 20009	NONE	PC	GENERAL OPERATING SUPPORT	45,000
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SIXTH & I HISTORIC SYNAGOGUE 600 I ST NW WASHINGTON, DC 20001	NONE	PC	6TH IN THE CITY	60,000
SMILE ON SENIORS OF ARIZONA 2110 EAST LINCOLN DRIVE PHOENIX, AZ 85016	NONE	PC	GENERAL OPERATING SUPPORT	1,800
SOUTHERN POVERTY LAW CENTER 400 WASHINGTON AVE MONTGOMERY, AL 36104	NONE	PC	PROGRAM SUPPORT	2,500
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TEAM RUBICON 6171 W CENTURY BLVD STE 310 LOS ANGELES, CA 90045	NONE	PC	GENERAL OPERATING SUPPORT	2,500
THE ABRAHAM FUND INITIATIVES 1460 BROADWAY STE 9021 NEW YORK, NY 10036	NONE	PC	GENERAL OPERATING SUPPORT	3,500
THE ISRAEL PROJECT 1901 PENNSYLVANIA AVENUE NW STE 600 WASHINGTON, DC 20006	NONE	PC	GENERAL OPERATING SUPPORT	10,000
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE LAB SCHOOL OF WASHINGTON 4759 RESERVOIR ROAD NW WASHINGTON, DC 20007	NONE	PC	GENERAL OPERATING SUPPORT	5,000
THE MALALA FUNDPO BOX 53347 WASHINGTON, DC 20009	NONE	PC	GENERAL OPERATING SUPPORT	3,000
THE POSSE FOUNDATION 1319 F STREET NW STE 604 WASHINGTON, DC 20004	NONE	PC	POSSE D C	2,000
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE WASHINGTON BALLET 3515 WISCONSIN AVE NW WASHINGTON, DC 20016	NONE	PC	COMMUNITY ENGAGEMENT PROGRAMMING	45,000
UNITED STATES HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG PLACE SW WASHINGTON, DC 20024	NONE	PC	GENERAL OPERATING SUPPORT	1,000
VALLEY BEIT MIDRASH 4645 E MARILYN RD PHOENIX, AZ 85032	NONE	PC	STRENGTHENING & EXPANSION OF YOUNG PROFESSIONALS PROGRAM	50,000
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
VALLEY BEIT MIDRASH 4645 E MARILYN ROAD PHOENIX, AZ 85032	NONE	PC	GENERAL OPERATING SUPPORT	3,800
WETA3939 CAMPBELL AVENUE ARLINGTON, VA 22206	NONE	PC	GENERAL OPERATING SUPPORT	1,000
YAFFEDPO BOX 1796 NEW YORK, NY 10956	NONE	PC	GENERAL OPERATING SUPPORT	3,600
Total ▶ 3a				2,173,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
YESHIVA OF GREATER WASHINGTON 2010 LINDEN LANE SILVER SPRING, MD 20910	NONE	PC	GENERAL OPERATING SUPPORT	10,000
YOUNG PLAYWRIGHTS' THEATER 6925 WILLOW ST NW STE LL-230 WASHINGTON, DC 20012	NONE	PC	2019-2020 PROGRAMMING AND PRODUCTION SEASON	25,000
Total ▶ 3a				2,173,500

TY 2018 Accounting Fees Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	31,974	7,994		23,981

TY 2018 Investments Corporate Bonds Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS-PNC HAWTHORN	25,244	25,244
US FIXED INCOME- JP MORGAN-2007	907,143	907,143

TY 2018 Investments Corporate Stock Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK - PNC HAWTHORN	910,865	910,865
SCHWAB MANAGED EQUITIES	3,465,498	3,465,498

TY 2018 Investments Government Obligations Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

**US Government Securities - End
of Year Book Value:**

267,270

**US Government Securities - End
of Year Fair Market Value:**

267,270

**State & Local Government
Securities - End of Year Book
Value:**

34,917

**State & Local Government
Securities - End of Year Fair
Market Value:**

34,917

TY 2018 Investments - Other Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
 FOUNDATION
EIN: 52-6078041

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
CORE CAPITAL PARTNERS	AT COST	63,701	1,081,346
NOTE RECEIVABLE-LLC	FMV	11,823,186	11,823,186
LONG POND OFFSHORE LTD	FMV	608,988	608,988
VITTORIA OFFSHORE LTD	FMV	6,498,954	6,498,954
MUTUAL FUNDS FIXED INCOME - PNC HAWTHORN	FMV	4,077	4,077
MUTUAL FUNDS EQUITIES-PNC HAWTHORN	FMV	36,014	36,014
MUTUAL FUNDS ALTERNATIVES- PNC HAWTHORN	FMV	64,330	64,330
MUTUAL FUNDS FIXED INCOME - PNC HAWTHORN-PRINC	FMV	25,000	25,000
MUTUAL FUNDS EQUITIES-PNC HAWTHORN-PRINC	FMV	21,207,305	21,207,305
MUTUAL FUNDS ALTERNATIVES- PNC HAWTHORN-PRINC	FMV	1,779,127	1,779,127
US LARGE CAP EQUITY -2007	FMV	314,623	314,623
US SMALL CAP EQUITY-2007	FMV	31,100	31,100
EUROPEAN LARGE CAP EQUITY-2007	FMV	201,750	201,750
EMERGING MARKET LARGE CAP EQUITY-2007	FMV	176,580	176,580
PREFERRED STOCK AND OTHER-2007	FMV	45,544	45,544
ELEVAR EQUITY IV, LLP FUND-2007	FMV	264,427	264,427
US LARGE CAP EQUITY-9005	FMV	2,429,794	2,429,794
EAFE EQUITY-9005	FMV	992,253	992,253
EUROPEAN LARGE CAP EQUITY-9005	FMV	110,442	110,442
JAPANESE LARGE CAP EQUITY-9005	FMV	82,823	82,823
ASIA EX-JAPAN EQUITY-9005	FMV	75,954	75,954
EMERGING MARKET EQUITY-9005	FMV	21,190	21,190
MUTUAL FUNDS BONDS-SCHWAB	FMV	987,160	987,160
EQUITY FUNDS-SCHWAB	FMV	3,840,724	3,840,724
SLG INTERNATIONAL OPPORTUNITIES	FMV	1,987,626	1,987,626

TY 2018 Other Assets Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
SECURITY DEPOSIT	14,036	14,036	14,036

TY 2018 Other Decreases Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

Description	Amount
COST BASIS ADJUSTMENT ON INVESTMENTS	109
UNREALIZED LOSS ON INVESTMENTS	145,487
CORE CAPITAL DISTRIBUTION PER K-1	5

TY 2018 Other Expenses Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEES	194	0		194
OFFICE EXPENSE	6,770	0		6,770
PAYROLL FEES	2,557	0		2,557
INSURANCE	6,346	0		6,346
DUES	1,500	0		1,500
COMPUTERS	1,108	0		1,108
MISCELLANEOUS	202	0		202
SOFTWARE LICENSE	17,468	0		17,468
CORE CAPITAL PARTNERS K-1 INTEREST	25,488	25,488		0
CORE CAPITAL PARTNERS K-1 OTHER DEDUCTIONS	44,571	44,571		0

TY 2018 Other Income Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
NOTE RECEIVABLE INTEREST	605,640	605,640	605,640
2017 AND 2016 MD TAX REFUNDS	3,922		3,922

TY 2018 Other Increases Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

Description	Amount
RETURNED GRANTS	5,181
BOOK VALUE TO TAX BASIS AJUSTMENT CORE CAPITAL K-1	119,236

TY 2018 Other Professional Fees Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	171,226	171,226		0
CONSULTING	20,933	0		20,933

**TY 2018 Substantial Contributors
Schedule**

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

Name	Address
GERALDINE POLINGER	5530 WISCONSIN AVE SUITE 100 CHEVY CHASE, MD 208254330

TY 2018 Taxes Schedule

Name: HOWARD AND GERALDINE POLINGER FAMILY
FOUNDATION

EIN: 52-6078041

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	58,472	0		0

efile GRAPHIC print - DO NOT PROCESS		As Filed Data -		DLN: 9349129800039	
Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service		Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Go to www.irs.gov/Form990 for the latest information			OMB No 1545-0047 2018
Name of the organization HOWARD AND GERALDINE POLINGER FAMILY FOUNDATION				Employer identification number 52-6078041	
Organization type (check one)					
Filers of: Section:					
Form 990 or 990-EZ		☐ 501(c)() (enter number) organization			
		☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation			
		☐ 527 political organization			
Form 990-PF		☒ 501(c)(3) exempt private foundation			
		☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation			
		☐ 501(c)(3) taxable private foundation			
Check if your organization is covered by the General Rule or a Special Rule .					
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.					
General Rule					
☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.					
Special Rules					
☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 ¹ / ₃ % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.					
☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 <i>exclusively</i> for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.					
☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions <i>exclusively</i> for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an <i>exclusively</i> religious, charitable, etc., purpose. Don't complete any of the parts unless the General Rule applies to this organization because it received <i>nonexclusively</i> religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . ▶ \$					
Caution. An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).					
For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF		Cat No 30613X		Schedule B (Form 990, 990-EZ, or 990-PF) (2018)	

Name of organization HOWARD AND GERALDINE POLINGER FAMILY FOUNDATION	Employer identification number 52-6078041
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Part I Contributors (See instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	GERALDINE POLINGER 5530 WISCONSIN AVE SUITE 100 CHEVY CHASE, MD 208254330	\$ 5,415,484	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
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		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization HOWARD AND GERALDINE POLINGER FAMILY FOUNDATION	Employer identification number 52-6078041
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Part II	Noncash Property
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(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	SHS CUSTODIED BY SCHWAB AND SLG INT'LL OPP FUND	\$ 5,415 484	2019-04-30
(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
_____	_____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____	\$ _____	_____

Name of organization HOWARD AND GERALDINE POLINGER FAMILY FOUNDATION	Employer identification number 52-6078041
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	