

For calendar year 2018, or tax year beginning 10-01-2018, and ending 09-30-2019

Name of foundation THE JULIUS AND DOROTHY LAZARUS FOUNDATION INC		A Employer identification number 52-1909406	
Number and street (or P O box number if mail is not delivered to street address) 4550 MONTGOMERY AVENUE NO 800N		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code BETHESDA, MD 20814		B Telephone number (see instructions) (301) 951-9090	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☒ Address change ☐ 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) \$ 1,166,880		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)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	250	250		
	4 Dividends and interest from securities	22,178	22,178		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	55,733			
	b Gross sales price for all assets on line 6a 371,278				
	7 Capital gain net income (from Part IV, line 2)		55,733		
	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)	37,661	37,661		
	12 Total. Add lines 1 through 11	115,822	115,822		
	13 Compensation of officers, directors, trustees, etc	21,250	10,625		10,625
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	5,825	2,912		2,913
	c Other professional fees (attach schedule)				
	17 Interest	1,498	1,498		0
	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)	7,861	7,861		0
	24 Total operating and administrative expenses. Add lines 13 through 23	36,434	22,896		13,538
	25 Contributions, gifts, grants paid	169,350			169,350
	26 Total expenses and disbursements. Add lines 24 and 25	205,784	22,896		182,888
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-89,962			
	b Net investment income (if negative, enter -0-)		92,926		
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	11,149	9,821	9,821		
	2	Savings and temporary cash investments	104,980	74,476	74,476		
	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)	51,237	50,549	52,056		
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)	900,091	842,649	1,030,527		
	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)	1,067,457	977,495	1,166,880			
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	1,067,457	977,495			
30		Total net assets or fund balances (see instructions)	1,067,457	977,495			
31		Total liabilities and net assets/fund balances (see instructions) .	1,067,457	977,495			

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	1,067,457
2	Enter amount from Part I, line 27a	2	-89,962
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	977,495
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	977,495

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	55,733
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	153,020	1,245,228	0 122885
2016	198,478	1,297,423	0 152979
2015	136,560	1,349,140	0 101220
2014	150,612	1,477,525	0 101935
2013	154,817	1,514,916	0 102195
2 Total of line 1, column (d)			2 0 581214
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 116243
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4 1,151,468
5 Multiply line 4 by line 3			5 133,850
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 929
7 Add lines 5 and 6			7 134,779
8 Enter qualifying distributions from Part XII, line 4 ,			8 182,888

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	929
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	929
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	929
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	1,254
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	1,254
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	325
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ☐ 325 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). <i>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</i>	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? <i>If "Yes," attach a detailed description of the activities</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T</i>	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? <i>If "Yes," complete Part II, col (c), and Part XV</i>	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? <i>If "No," attach explanation</i> .	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. <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ THE FOUNDATION Telephone no ▶ (301) 951-9090			

Located at **▶** 4550 MONTGOMERY AVENUE SUITE 800N BETHESDA MDZIP+4 **▶** 20814

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
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?	☐ Yes ☒ No		
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?	☐ Yes ☒ No		
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
JOSEPH A BALDINGER 2600 TOWER OAKS BOULEVARD SUITE 103 ROCKVILLE, MD 20852	TRUSTEE 3 00	16,250	0	0
MICHAEL C GELMAN 11 WEST LENOX STREET CHEVY CHASE, MD 20815	TRUSTEE 1 00	5,000	0	0

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

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

Total number of other employees paid over \$50,000. ▶	0
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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (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	1,103,842
b	Average of monthly cash balances.	1b	16,621
c	Fair market value of all other assets (see instructions).	1c	48,540
d	Total (add lines 1a, b, and c).	1d	1,169,003
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	1,169,003
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	17,535
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,151,468
6	Minimum investment return. Enter 5% of line 5.	6	57,573

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	57,573
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	929
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	929
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	56,644
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	56,644
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	56,644

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	182,888
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	182,888
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	929
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	181,959

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				56,644
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013.	81,661			
b From 2014.	78,810			
c From 2015.	70,903			
d From 2016.	135,913			
e From 2017.	92,243			
f Total of lines 3a through e.	459,530			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 182,888				
a Applied to 2017, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2018 distributable amount.				56,644
e Remaining amount distributed out of corpus	126,244			
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	585,774			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions).	81,661			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	504,113			
10 Analysis of line 9				
a Excess from 2014.	78,810			
b Excess from 2015.	70,903			
c Excess from 2016.	135,913			
d Excess from 2017.	92,243			
e Excess from 2018.	126,244			

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

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

Form **990-PF** (2018)

Part XVII

	Yes	No
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1a(1)	No
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1a(2)	No
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1b(1)	No
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1b(2)	No
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1b(3)	No
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1b(4)	No
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1b(5)		No
--------------	--	-----------

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

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

value
ue

[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 ***** _____ Signature of officer or trustee	2019-10-26 _____ Date	***** _____ Title
--	--	--

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ **Yes** ☐ **No**

Paid Preparer Use Only	ERIC LAWRENCE CPA				
	Firm's name ► GELMAN ROSENBERG & FREEDMAN				Firm's EIN ► 52-1392008
	Firm's address ► 4550 MONTGOMERY AVE SUITE 800N BETHESDA, MD 208142930				Phone no (301) 951-9090

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ Yes ☐ No

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	TWEEDY BROWNE GLOBAL VALUE FUND			2018-10-17
1	12,607 377 SHS JOHN HANCOCK FD II GLOBAL ABSOLUTE			2018-12-27
	3965 833 SHS ATLAS MID CAP EQUITY FD			2019-07-12
	2083 333 SHS CIBC ATLAS DISCIPLINED EQUITY FD			2019-07-12
	1078 361 SHS TWEEDY BROWNE GLOBAL VALUE FD			2019-07-12
	7222 151 SHS VIRTUS SEIX FLOATING RATE HIGH			2019-07-12
	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)
15,000		15,077	-77
125,318		136,303	-10,985
65,000		47,006	17,994
45,000		23,484	21,516
30,000		30,280	-280
61,388		63,395	-2,007
29,572			29,572

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	
			-77
			-10,985
			17,994
			21,516
			-280
			-2,007
			29,572

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
A GREATER WASHINGTON (FIELDS OF DREAMS) 1825 K STREET NW STE 450 WASHINGTON, DC 20006	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	5,000
ADAS ISRAEL CONGREGATION 2850 QUEBEC STREET NW WASHINGTON, DC 20008	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	13,500
ANTI-DEFAMATION LEAGUE 605 THIRD AVENUE NEW YORK, NY 10158	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	1,500
Total ▶ 3a				169,350

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>				
CENTER FOR CREATIVE CHANGE (MOMENT MAGAZINE) 205 WASHINGTON ST SW BLACKSBURG, VA 24060	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	5,000
CHABAD SHUL OF POTOMAC 11621 SEVEN LOCKS ROAD POTOMAC, MD 20854	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	12,000
CHARLES E SMITH LIFE COMMUNITIES 6121 MONTROSE ROAD ROCKVILLE, MD 20852	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	5,000
Total ▶ 3a				169,350

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>				
CITY KIDS TO WILDERNESS PROJECT 2437 15TH STREET NW WASHINGTON, DC 20009	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	1,000
CONGREGATION RODEPH SHOLOM 7 W 83RD ST NEW YORK, NY 10024	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	1,000
DC VOLUNTEER LAWYERS PROJECT 5335 WISCONSIN AVE NW 440 WASHINGTON, DC 20015	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	1,000
Total ► 3a				169,350

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>				
EAGLE BANK FOUNDATION 12505 PARK POTOMAC AVENUE POTOMAC, MD 20854	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	750
EDLAVITCH JCC OF WASHINGTON DC 1529 SIXTEETH STREET NW WASHINGTON, DC 20036	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORTGENERAL SUPPORT	16,500
EMORY UNIVERSITY 1762 CLIFTON ROAD ATLANTA, GA 30322	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	5,000
Total ▶ 3a				169,350

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>				
FRIENDSHIP CIRCLE 11621 SEVEN LOCKS ROAD POTOMAC, MD 20854	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	1,000
ISRAEL POLICY FORUM (JEWISH ELECTORATE INSTITUTE) 355 LEXINGTON AVENUE 14TH FLOOR NEW YORK, NY 10017	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	50,000
JEWISH FEDERATION OF GREATER WASHINGTON 6101 MONTROSE ROAD SUITE 100 ROCKVILLE, MD 20852	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	10,000
Total ▶ 3a				169,350

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>				
JUVENILE DIABETES RESEARCH FOUNDATION 1400 K STREET NW SUITE 725 WASHINGTON, DC 20005	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	2,500
KNESSET YEHUDA1218 E 13TH STREET BROOKLYN, NY 11230	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	3,600
LAZARUS LEADERSHIP FELLOWS PROGRAM 7211 EXETER ROAD BETHESDA, MD 20814	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	10,000
Total ▶ 3a				169,350

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>				
NARAL PRO-CHOICE AMERICA FOUNDATION 1725 EYE STREET NW SUITE 900 WASHINGTON, DC 20006	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	3,000
NATIONAL AUDUBON SOCIETY 225 VARICK ST NEW YORK, NY 10014	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	1,000
NATIONAL GALLERY OF ART 6TH CONSTITUTION AVENUE NW WASHINGTON, DC 20565	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	5,000
Total ► 3a				169,350

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>				
NEW MUSEUM OF CONTEMPORARY ART 235 BOWERY STREET NEW YORK, NY 10002	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	1,000
RABBINICAL SEMINARY OF AMERICA 7601 147TH STREET FLUSHING, NY 11367	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	1,500
SLABODKA YESHIVA RABBINICAL 169 PARKVILLE AVENUE BROOKLYN, NY 11230	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	2,000
Total ▶ 3a				169,350

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 CHESAPEAKE ORCHESTRA (ARTOLUTION) PO BOX 1227 LENOARDTOWN, MD 20650	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	500
THE GESHER FOUNDATION INC 322 BLEECKER STREET SUITE 444 NEW YORK, NY 10014	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	5,000
THE PUBLIC THEATER 425 LAFAYETTE STREET NEW YORK, NY 10003	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	1,000
Total ▶ 3a				169,350

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>				
US HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG PLACE SW WASHINGTON, DC 20024	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	2,500
YOUTH ART FOR HEALING 8608 MELWOOD ROAD BETHESDA, MD 20817	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT	2,500
Total ▶ 3a				169,350

TY 2018 Accounting Fees Schedule

Name: THE JULIUS AND DOROTHY LAZARUS
FOUNDATION INC

EIN: 52-1909406

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
GELMAN, ROSENBERG & FREEDMAN	5,825	2,912		2,913

TY 2018 Investments Corporate Bonds Schedule

Name: THE JULIUS AND DOROTHY LAZARUS
FOUNDATION INC

EIN: 52-1909406

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
25,000.000 SHS BLACKROCK INC SR NT	25,222	26,696
25,000.000 SHS GOLDMAN SACHS GRP INC MTN SR NT	25,327	25,360

TY 2018 Investments - Other Schedule

Name: THE JULIUS AND DOROTHY LAZARUS
FOUNDATION INC

EIN: 52-1909406

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
1,000 ISHARES INTERMEDIATE GOVERNMENT/CREDIT BOND ETF	AT COST	111,756	113,220
2,518.775 SHS MATTHEWS PACIFIC TIGER FD IS #102	AT COST	62,960	69,946
1,770.000 SHS BARCLAYS ETN SELECT MLP ETN	AT COST	44,467	32,497
12,910.297 SHS ATLAS DISCIPLINED EQUITY FUND INSTL	AT COST	131,124	276,151
2,676.927 SHS PAX WORLD SMALL CAP FUND - INST	AT COST	39,655	37,209
5,115.783 SHS ATLAS INCOME OPPORTUNITIES FUND INST	AT COST	51,873	62,771
4,084.588 SHS TWEEDY BROWNE GLOBAL VALUE FUND #1	AT COST	109,141	113,021
8.125% OWNERSHIP OF PARKSIDE TERRACE LTD PARTNERSHIP	AT COST	49,199	49,199
5,238.882 SHS ATLAS MID CAP EQUITY FUND INSTL	AT COST	52,474	83,822
15,151.515 SHS VANGUARD INTERMEDIATE-TERM INVESTMENT GRADE FUND	AT COST	150,000	152,424
1,568.013 SHS VERSUS CAPITAL REAL ASSETS FUND	AT COST	40,000	40,267

TY 2018 Other Expenses Schedule

Name: THE JULIUS AND DOROTHY LAZARUS
FOUNDATION INC

EIN: 52-1909406

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	7,174	7,174		0
AMORTIZATION OF BOND PREMIUM	687	687		0

TY 2018 Other Income Schedule

Name: THE JULIUS AND DOROTHY LAZARUS
FOUNDATION INC

EIN: 52-1909406

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP - PARKSIDE TERRACE LIMITED PARTNERSHIP	37,661	37,661	37,661