

EXTENDED TO OCTOBER 15, 2020
Return of Private Foundation

OMB No 1545-0052

2018

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

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

For calendar year 2018 or tax year beginning DEC 1, 2018, and ending NOV 30, 2019

Name of foundation
THE SO CHARITABLE TRUST
C/O ODED ABOODI, TRUSTEE

Number and street (or P O box number if mail is not delivered to street address) Room/suite
C/O ALPINE RESOURCES LLC, POB 5028

City or town, state or province, country, and ZIP or foreign postal code
NEW YORK, NY 10150

G Check all that apply: Initial return Initial return of a former public charity
 Final return Amended return
 Address change Name change

H Check type of organization: Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation

Fair market value of all assets at end of year (from Part II, col. (c), line 16) **\$ 3,774,799.**

J Accounting method: Cash Accrual
 Other (specify) _____

A Employer identification number
13-3050892

B Telephone number
(212) 641-5006

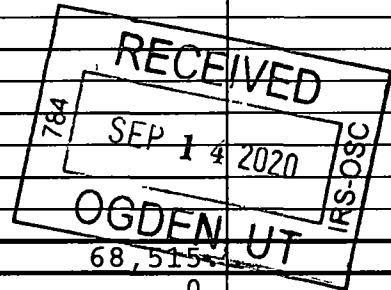
C If exemption application is pending, check here

D 1. Foreign organizations, check here
2. Foreign organizations meeting the 85% test, check here and attach computation

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

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	26,399.	26,399.	26,399.	STATEMENT 1
4 Dividends and interest from securities	42,116.	42,116.	42,116.	STATEMENT 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-2.			
b Gross sales price for all assets on line 6a	65.			
7 Capital gain net income (from Part IV, line 2)		0.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income				
12 Total Add lines 1 through 11	68,513.	68,515.	68,515.	
13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees				
b Accounting fees				
c Other professional fees				
17 Interest				
18 Taxes STMT 3	3,541.	3,541.	0.	0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses STMT 4	110.	110.	0.	0.
24 Total operating and administrative expenses. Add lines 13 through 23	3,651.	3,651.	0.	0.
25 Contributions, gifts, grants paid	215,829.			215,829.
26 Total expenses and disbursements. Add lines 24 and 25	219,480.	3,651.	0.	215,829.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-150,967.			
b Net investment income (if negative, enter -0-)		64,864.		
c Adjusted net income (if negative, enter -0-)			68,515.	

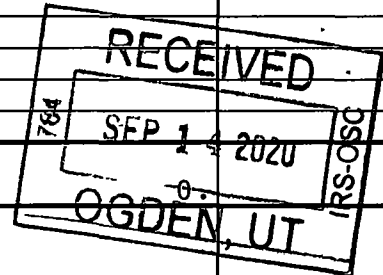


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THE SO CHARITABLE TRUST
C/O ODED ABOODI, TRUSTEE

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of year amounts only		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
Assets	1 Cash - non-interest-bearing						
	2 Savings and temporary cash investments			1,744,786.	1,593,883.	1,593,883.	
	3 Accounts receivable	3.					
	Less: allowance for doubtful accounts				3.	3.	
	4 Pledges receivable						
	Less: allowance for doubtful accounts						
	5 Grants receivable						
	6 Receivables due from officers, directors, trustees, and other disqualified persons						
	7 Other notes and loans receivable						
	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						
	b Investments - corporate stock	STMT 5			1,579,828.	1,579,052.	2,180,913.
	c Investments - corporate bonds						
	11 Investments - land, buildings, and equipment basis						
Less: accumulated depreciation							
12 Investments - mortgage loans							
13 Investments - other							
14 Land, buildings, and equipment: basis							
Less: accumulated depreciation							
15 Other assets (describe)							
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)				3,324,614.	3,172,938.	3,774,799.	
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						
	22 Other liabilities (describe)						
23 Total liabilities (add lines 17 through 22)				0.	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.	<input type="checkbox"/>					
	24 Unrestricted						
	25 Temporarily restricted						
	26 Permanently restricted						
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.	<input checked="" type="checkbox"/>					
	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				3,324,614.	3,172,938.		
30 Total net assets or fund balances				3,324,614.	3,172,938.		
31 Total liabilities and net assets/fund balances				3,324,614.	3,172,938.		



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	3,324,614.
2 Enter amount from Part I, line 27a	2	-150,967.
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	3,173,647.
5 Decreases not included in line 2 (itemize) BOOK/TAX ADJUSTMENT - BNY STOCK	5	709.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	3,172,938.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)	
1a	WABTEC CIL	P	02/26/19	02/26/19	
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	65.	67.	-2.		
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a			-2.		
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	-2.
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). If (loss), enter -0- in Part I, line 8.		{ }		3	0.

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	170,583.	4,010,814.	.042531
2016	174,319.	4,030,401.	.043251
2015	192,316.	3,803,514.	.050563
2014	322,112.	2,651,784.	.121470
2013	561,258.	1,932,300.	.290461
2 Total of line 1, column (d)			2 .548276
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 .109655
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4 3,785,204.
5 Multiply line 4 by line 3			5 415,067.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 649.
7 Add lines 5 and 6			7 415,716.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.			8 215,829.

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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 <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b	1	1,297.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0.
3	Add lines 1 and 2	3	1,297.
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	1,297.
6	Credits/Payments:		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	2,000.
b	Exempt foreign organizations - tax withheld at source	6b	0.
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	2,000.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	703.
11	Enter the amount of line 10 to be: Credited to 2019 estimated tax <input type="checkbox"/> 703. Refunded <input type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b	N/A	
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		X

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Part VII-A. Statements Regarding Activities (continued)

	Yes	No
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		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	X	
14 The books are in care of ► <u>ODED ABOODI, TRUSTEE</u> Telephone no. ► <u>212-641-5006</u> Located at ► <u>C/O ALPINE RESOURCES LLC, P.O. BOX 5028, NEW YORK</u> ZIP+4 ► <u>10150</u>		
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 <u>N/A</u>		
16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here ► <u>N/A</u>		
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?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____, _____, _____ 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.) <u>N/A</u> c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <u>N/A</u>		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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?		X

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

		Yes	No
5a During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	N/A	5b	
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>		
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?	N/A <input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	X
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b	
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

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

1 List all officers, directors, trustees, and foundation managers and their compensation.

(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
ODED ABOODI, C/O ALPINE RESOURCES LLC P.O. BOX 5028 NEW YORK, NY 10150	TRUSTEE 2.00	0.	0.	0.
SOLOMON M. WEISS 632 IRVINGTON AVE HILLSIDE, NJ 07205	TRUSTEE 2.00	0.	0.	0.

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

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

Total number of other employees paid over \$50,000

0

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services ▶ 0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
3 All other program-related investments. See instructions.	

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	2,172,611.
b	Average of monthly cash balances	1b	1,670,234.
c	Fair market value of all other assets	1c	2.
d	Total (add lines 1a, b, and c)	1d	3,842,847.
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	3,842,847.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	57,643.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,785,204.
6	Minimum investment return. Enter 5% of line 5	6	189,260.

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	189,260.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	1,297.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,297.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	187,963.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	187,963.
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	187,963.

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	215,829.
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	215,829.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	215,829.

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				187,963.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013	495,701.			
b From 2014	192,679.			
c From 2015	2,960.			
d From 2016				
e From 2017				
f Total of lines 3a through e	691,340.			
4 Qualifying distributions for 2018 from Part XII, line 4: ▶ \$	215,829.			
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				187,963.
e Remaining amount distributed out of corpus	27,866.			
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	719,206.			
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 instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	495,701.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	223,505.			
10 Analysis of line 9:				
a Excess from 2014	192,679.			
b Excess from 2015	2,960.			
c Excess from 2016				
d Excess from 2017				
e Excess from 2018	27,866.			

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

- 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling ▶
- b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year				(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
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).)
- ODED ABOODI, C/O ALPINE RESOURCES LLC**
- b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

- 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.
- 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:

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
INTEREST	26,399.	26,399.	26,399.
TOTAL TO PART I, LINE 3	26,399.	26,399.	26,399.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIV & INT	42,116.	0.	42,116.	42,116.	42,116.
TO PART I, LINE 4	42,116.	0.	42,116.	42,116.	42,116.

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ESTIMATED TAX PAYMENT - OA	460.	460.	0.	0.
ESTIMATED TAX PAYMENT - SMW	40.	40.	0.	0.
TAX PAYMENTS - OA	2,544.	2,544.	0.	0.
TAX PAYMENTS - SMW	500.	500.	0.	0.
REFUND OF INTEREST RE: 2019	-3.	-3.	0.	0.
TO FORM 990-PF, PG 1, LN 18	3,541.	3,541.	0.	0.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISC.	110.	110.	0.	0.
TO FORM 990-PF, PG 1, LN 23	110.	110.	0.	0.

FORM 990-PF

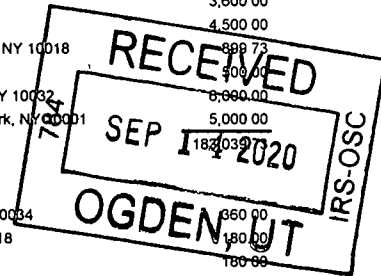
CORPORATE STOCK

STATEMENT 5

<u>DESCRIPTION</u>	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
CORPORATE STOCK	1,579,052.	2,180,913.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,579,052.	2,180,913.

THE SO CHARITABLE TRUST
Attachment to Form 990-PF - Contribution List 11/30/19
 EIN 3050892

Date	Num	Name	Address	Amount
OA - Distributions (Cash)				
12/06/2018	1909	ARETE EDUCATION INC	557 Grand Concourse, Suite 3, #140, Bronx, NY 10451	3,600 00
12/06/2018	1910	ASPEN COMMUNITY FOUNDATION	600 E Hopkins Ave , Suite 202, Aspen, CO 81611	1,800 00
12/11/2018	1926	THE ASPEN INSTITUTE	1000 North Third Street, Aspen, CO 81611	10,000 00
12/11/2018	1914	ASPEN SANTA FE BALLET	245 Sage Way, Aspen, CO 81611	1,800 00
12/11/2018	1912	THE BRONX CHARTER SCHOOL FOR CHILDREN	388 Willis Avenue, Bronx, NY 10454	1,800 00
12/11/2018	1913	CLARA McCLEAN HOUSE	20 First Village Dnve, Pinehurst, NC 28374	1,800 00
12/14/2018	1915	MOUNT SINAI HEALTH SYSTEM	One Gustave L. Levy Place, Box 1049, New York, NY 10029	10,000 00
12/14/2018	1916	RELIANCE FIRE COMPANY	94 Church Street, Alpine, NJ 07620	500 00
01/30/2019	EFT	MARINE CORPS SCHOLARSHIP FDN	909 North Washington Street Suite 400, Alexandria, VA 22314	540 00
03/07/2019	1917	BRUNSWICK SCHOOL	100 Maher Avenue, Greenwich, CT 06830	25,000 00
03/08/2019	1919	THE ASPEN INSTITUTE	1000 North Third Street, Aspen, CO 81611	10,000 00
03/08/2019	1920	STEPHEN WISE FREE SYNAGOGUE	30 W 68th Street, New York, NY 10023	5 400 00
03/11/2019	1859	HOPE & HEROES	161 Fort Washington Avenue, IP-7, New York, NY 10032	7,500 00
03/11/2019	1660	COLUMBIA UNIVERSITY	100 Haven Avenue, Suite 29D, New York, NY 10032	15,000 00
04/01/2019	1921	MS - LI WALK	40 Marcus Dnve, Suite 100, Melville, NY 11747	900 00
04/08/2019	1922	ASPEN COMMUNITY FOUNDATION	600 E Hopkins Ave , Suite 202, Aspen, CO 81611	15,000 00
04/18/2019	1923	JASA	247 West 37th Street, 9th Floor New York, NY 10018	1,000 00
05/16/2019	1924	NSUH AUXILIARY	2000 Marcus Avenue, New Hyde Park, NY 11042	10,000 00
05/20/2019	1927	HOPE & HEROES	161 Fort Washington Avenue, IP-7, New York, NY 10032	25,000 00
06/04/2019	EFT	ST JUDE CHILDREN S RESEARCH HOSPITAL	501 St Jude Place, Memphis TN 38105	50 00
06/04/2019	EFT	ST JUDE CHILDREN S RESEARCH HOSPITAL	501 St Jude Place, Memphis, TN 38105	50 00
09/03/2019	1951	HELP FUND/MNF	1751 Second Avenue, New York, NY 10128	5,400 00
09/03/2019	1925	NEW ALTERNATIVES FOR CHILDREN INC	37 West 26th Street, New York, NY 10010	5 400 00
09/05/2019	1952	HEREDITARY DISEASE FOUNDATION	3960 Broadway, 6th Floor New York, NY 10032	5,000 00
09/17/2019	992	THE LUSTGARTEN FOUNDATION	1111 Stewart Avenue, Bethpage, NY 11714	3,600 00
09/23/2019	1953	CONGREGATION SHEARITH ISRAEL	8 West 70th Street New York, NY 10023	4,500 00
09/26/2019	online	DONORSCHOOSE ORG	134 West 37th Street, 11th Floor, New York, NY 10018	899 73
10/16/2019	1954	RELIANCE FIRE COMPANY	94 Church Street, Alpine, NJ 07620	409 00
10/23/2019	1955	COLUMBIA UNIVERSITY	100 Haven Avenue, Suite 29D, New York, NY 10032	6,680 00
10/23/2019	1956	HARBORING HEARTS	601 West 26th Street, Suite 325-18, New York, NY 10001	5,000 00
Total OA - Distributions (Cash)				
SMW - Distributions (Cash)				
12/01/2018	3856	PERFECT PET RESCUE	10737 Venice Boulevard, Los Angeles, CA 90034	360 00
12/05/2018	3857	AMERICAN COMMITTEE FOR SHAARE ZEDEK	55 W 39th Street, 4th fl., New York, NY 10018	180 00
01/03/2019	3858	YESHIVA BER YITCHAK	1391 North Avenue, Elizabeth, NJ 07208	180 89
01/10/2019	3859	NEW MILFORD HIGH SCHOOL	One Center Street, Newark, NJ 07102	540 00
01/10/2019	3860	YIDDISH BOOK CENTER	1021 West Street, Amherst, MA 01002	360 00
01/10/2019	3861	DE WITT CLINTON SCHOLARSHIP & STUDENT AID	PO Box 566, Elmsford, NY 10523-0566	108 00
01/10/2019	3862	THE CARLBACH SHUL	305 W 79th Street, New York, NY 10024	400 00
01/10/2019	3863	LINCOLN SQUARE SYNAGOGUE	180 Amsterdam Avenue, New York, NY 10023	180 00
01/10/2019	3864	THE JEWISH MUSEUM	1109 Fifth Avenue, New York, NY 10128	154 00
01/28/2019	3865	YOUNG ISRAEL CONGREGATION OF BAL HARBOUR	9592 Harding Avenue, 2nd Fl , Surfside, FL 33154	1,380 00
02/05/2019	3867	THE NEW YORK PUBLIC LIBRARY	445 Fifth Avenue, New York, NY 10016	180 00
02/05/2019	3868	SIMON WEISENTHAL CENTER	1399 South Roxbury Dnve, Los Angeles, CA 90035-4709	108 00
02/05/2019	3870	NEW YORK PUBLIC RADIO	160 Vanck Street, New York, NY 10013	180 00
02/05/2019	3871	HOPE & HEROES	161 Fort Washington Avenue, IP-7, New York, NY 10032	180 00
02/05/2019	3872	MUSEUM AT ELDRIDGE STREET	12 Eldrdge Street, New York, NY 10002	108 00
02/05/2019	3873	BRIS AVROHM	910 Salem Avenue, Hillside, NJ 07205	360 00
02/05/2019	3874	CHABAD AT BRANDEIS	54 Turner Street, Waltham, MA 02453	360 00
02/05/2019	3875	NATIONAL JEWISH OUTREACH PROGRAM	989 Sixth Avenue, 10th Fl., New York, NY 10018	2,016 00
02/05/2019	3869	ALZHEIMER'S ASSOCIATION	225 N Michigan Avenue, Fl 17, Chicago, IL 60601	180 00
02/05/2019	3866	AMERICAN ASSOC OF BEN GURION UNIVERSITY	1001 Avenue of the Americas, 19th Fl., New York, NY 10018	108 00
02/22/2019	3876	THE WEST POINT JEWISH CHAPEL FUND	PO Box 84, West Point, NY 10996	126 00
02/22/2019	3877	THE JEWISH COMMUNITY SERVICE OF S FL	735 NE 125th Street, Miami, FL 33161	108 00
02/22/2019	3878	AMERICAN SOCIETY OF YAD VASHEM	500 Fifth Avenue, 42nd fl., New York, NY 10110-4299	126 00
02/22/2019	3879	UJA FEDERATION OF NY	130 East 59th Street, New York NY 10022	720 00
02/22/2019	3880	THE METROPOLITAN MUSEUM OF ART	1000 Fifth Avenue New York, NY 10028	180 00
03/15/2019	3881	B'NAI BRITH INTERNATIONAL	1120 20th Street NW, Suite 300 North, Washington, DC 20036	108 00
03/15/2019	3882	CENTRAL PARK CONSERVANCY	14 E 60th Street, New York, NY 10022	108 00
03/15/2019	3883	THE MUSEUM OF THE CITY OF NEW YORK	1220 Fifth Avenue, New York, NY 10029	154 00
03/15/2019	3884	NORTHWELL HEALTH FOUNDATION	125 Community Dnve, Great Neck, NY 11021	180 00
03/15/2019	3886	ST BARNABAS MEDICAL CENTER	94 Old Short Hills Road, Livingston, NJ 07039	108 00
03/15/2019	3887	WORLD JEWISH CONGRESS	501 Madison Avenue, New York, NY 10022	108 00
03/15/2019	3889	JEWISH FAMILY SERVICE OF CENTRAL NJ	655 Westfield Avenue, Elizabeth, NJ 07208	108 00
03/15/2019	3890	YOUNG ISRAEL OF BAL HARBOUR	9592 Harding Avenue, 2nd Fl , Surfside, FL 33154	360 00
03/15/2019	3885	THE NEW YORK PHILHARMONIC	10 Lincoln Center Plaza, New York NY 10023	108 00
03/15/2019	3888	STATUE OF LIBERTY & ELLIS ISLAND FDTN INC	17 Battery Place, Suite 210, New York, NY 10004	108 00
03/27/2019	3891	AMERICAN ALS OF BEN GURION UNIVERSITY	1001 Avenue of the Americas, 19th Fl., New York, NY 10018	108 00
03/27/2019	3892	CONGREGATION ADATH ISRAEL	1391 North Avenue, Elizabeth, NJ 07208	540 00
04/01/2019	3893	LINCOLN SQUARE SYNAGOGUE	180 Amsterdam Avenue, New York, NY 10023	180 00



THE SO CHARITABLE TRUST
Attachment to Form 990-PF - Contribution List 11/30/19
 EIN: 3050892

Date	Num	Name	Address	Amount
04/04/2019	3894	WEILL CORNELL MEDICINE	1300 York Avenue, New York, NY 10065	108 00
04/04/2019	3895	MESORAH HERITAGE FOUNDATION	4401 Second Avenue, Brooklyn, NY 11232	108 00
04/04/2019	3896	U S HOLOCAUST MEMORIAL MUSEUM	100 Raoul Wallenberg Place, SW, Washington, DC 20024-2126	108 00
04/04/2019	3897	THE JERUSALEM FOUNDATION	420 Lexington Avenue, New York, NY 10170	108 00
04/04/2019	3898	FRIENDS OF THE 92ND STREET Y	1395 Lexington Avenue, New York, NY 10128	108 00
04/04/2019	3899	AMERICAN COMMITTEE FOR SHAAARI ZEDEK HOSP	55 W 39th Street, 4th fl, New York, NY 10018	1,008 00
04/04/2019	3900	AMERICAN COMMITTEE FOR THE WEIZMANN INST	633 Third Avenue, New York, NY 10017	108 00
04/04/2019	3901	MEMORIAL SLOAN KETTERING	1275 York Avenue, New York, NY 10065	126 00
04/04/2019	3904	WESTSIDE HATZALAH	131 West 86th Street, New York, NY 10024	180 00
04/04/2019	3902	AMERICAN FRIENDS OF GREAT SYNAGOGUE	3145 Coney Island Avenue, Brooklyn, NY 11235	720 00
04/09/2019	3905	QUEEN OF PEACE	325 N Newstead Avenue, St Louis, MO 63108	108 00
04/30/2019	3907	OHEL AVRAHAM	P O Box 95016, Palatine, IL 60095	252 00
04/30/2019	3906	FRIENDS OF UNITED HATZALAH	208 East 51st Street, Suite 303, New York, NY 10022	252 00
05/12/2019	3908	LINCOLN SQUARE SYNAGOGUE	180 Amsterdam Avenue, New York, NY 10023	180 00
05/14/2019	3909	KEREN OR	350 Seventh Ave, Suite 701, New York, NY 10001	360 00
05/14/2019	3910	YESHIVA OHR NISSAN	400 Mount Wilson Lane, Baltimore, MD 21208	180 00
05/14/2019	3911	LINCOLN SQUARE SYNAGOGUE	180 Amsterdam Avenue, New York, NY 10023	414 00
06/14/2019	3912	YESHIVA UNIVERSITY	500 W 185th Street, BH 725, New York, NY 10033	900 00
06/15/2019	3913	THE CARLEBACH SHUL	305 W 79th Street, New York, NY 10024	558 00
06/15/2019	3914	YESHIVA BE'ER YITZCHAK	1391 North Avenue, Elizabeth, NJ 07208	612 00
06/20/2019	3915	LINCOLN SQUARE SYNAGOGUE	180 Amsterdam Avenue, New York, NY 10023	1,760 00
06/30/2019	3917	LINCOLN SQUARE SYNAGOGUE	180 Amsterdam Avenue, New York, NY 10023	475 00
07/02/2019	3916	BEITAR COMMUNITY KOLLEL	Beitar, Israel	180 00
07/03/2019	3918	AMERICAN MUSEUM OF NATURAL HISTORY	Central Park West at 79th Street, New York, NY 10024	118 00
07/03/2019	3919	AMERICAN FRIENDS OF THE ISRAEL ORCHESTRA	122 E 42nd Street, Suite 4507, New York, NY 10168	108 00
07/03/2019	3920	AMIT	817 Broadway, New York, NY 10003	540 00
07/03/2019	3921	THE NEWARK MUSEUM	49 Washington Street, Newark, NJ 07102-3176	108 00
07/03/2019	3922	THE NEW YORK BOTANICAL GARDENS	2900 Southern Blvd, Bronx, NY 10458-5126	108 00
07/03/2019	3923	NEW WORLD SYMPHONY	500 17th Street, Miami Beach, FL 33139	108 00
07/03/2019	3924	CONGREGATION ADATH ISRAEL	1391 North Avenue, Elizabeth, NJ 07208	108 00
07/05/2019	3926	EAST HILL SYNAGOGUE	255 Walnut Street, Englewood, NJ 07631	360 00
07/22/2019	3928	THE WHITNEY MUSEUM OF AMERICAN ART	99 Gansevoort Street, New York, NY 10014	126 00
07/22/2019	3927	LINCOLN SQUARE SYNAGOGUE	180 Amsterdam Avenue New York, NY 10023	180 00
07/25/2019	3925	JEC - ELMORA SCHUL	330 Elmora Avenue, Elizabeth, NJ 07208	108 00
08/01/2019	3929	THE JEWISH MUSEUM	1109 Fifth Avenue, New York, NY 10128	1,008 00
08/01/2019	3930	YOUNG ISRAEL OF BAL HARBOUR	9592 Harding Avenue, 2nd Fl, Surfside, FL 33154	1,330 00
08/01/2019	3931	ST BARNABAS MEDICAL CENTER	94 Old Short Hills Road, Livingston, NJ 07039	108 00
09/04/2019	3932	HATZALAH OF UNION CITY	P O Box 9355, Elizabeth, NJ 07202-9355	180 00
09/10/2019	3933	J ROBERT OPPENHEIMER MEMORIAL COMMITTEE	P O Box 220, Los Alamos, NM 87544	180 00
10/02/2019	3935	LINCOLN SQUARE SYNAGOGUE	180 Amsterdam Avenue, New York, NY 10023	180 00
10/02/2019	3940	AMERICAN FRIENDS OF ISRAEL MUSEUM	545 Fifth Avenue, New York, NY 10017	720 00
10/02/2019	3934	CONGREGATION ADATH ISRAEL	1391 North Avenue Elizabeth, NJ 07208	1,350 00
10/02/2019	3936	AMERICAN FRIENDS OF YESHIVA MEIR	5227 New Utrecht Avenue, Brooklyn, NY 11219	1,800 00
10/02/2019	3937	AMERICAN FRIENDS OF GREAT SYNAGOGUE	3145 Coney Island Avenue, Brooklyn, NY 11235	540 00
10/02/2019	3938	AMERICAN FRIENDS OF YESHIVA HAKOTEL	11 Broadway, #901, New York, NY 10004	720 00
10/02/2019	3939	AMERICAN FRIENDS OF THE TEL AVIV MUSEUM	1201 Broadway, Suite 802, New York, NY 10001	360 00
10/02/2019	3941	PEF ENDOWMENT FOUNDATION	630 Third Avenue, 15th Floor, New York, NY 10017-6745	180 00
11/15/2019	3944	LINCOLN SQUARE SYNAGOGUE	180 Amsterdam Avenue, New York, NY 10023	180 00
11/18/2019	3942	JEWISH FEDERATION OF METROWEST	901 Route 10 East, Whippany, NJ 07981-1156	1,008 00
11/18/2019	3943	FRIENDS OF UNITED HATZALAH	208 East 51st Street, Suite 303, New York, NY 10022	252 00
11/18/2019	3945	YM-YWHA OF UNION COUNTY	501 Green lane, Union, NJ 07083	108 00
11/18/2019	3946	NEW JERSEY PERFORMING ARTS CENTER	One Center Street, Newark, NJ 07102	108 00
11/18/2019	3948	SOLOMON R GUGGENHEIM MUSEUM	1071 Fifth Avenue, New York, NY 10128-0173	108 00
11/18/2019	3949	INTERNATIONAL CENTER OF PHOTOGRAPHY	1114 Avenue of the Americas, New York, NY 10036	108 00
11/18/2019	3950	AMERICAN BALLET THEATRE	890 Broadway, New York, NY 10003-1278	108 00
11/18/2019	3951	FRIENDS OF CARNEGIE HALL	881 Seventh Avenue New York, NY 10019-8246	108 00

Total SMW - Distributions (Cash)

Total CHARITABLE CONTRIBUTIONS

