

2949104412208 1

Form **990-PF**Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2018

Open to Public Inspection

Department of the Treasury
Internal Revenue ServiceDo 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 12/01/18, and ending 11/30/19

Name of foundation THE CARL & NANCY GEWIRZ FUND, INC.		A Employer identification number 52-1387044
Number and street (or P.O. box number if mail is not delivered to street address) 7117 GLENBROOK ROAD	Room/suite	B Telephone number (see instructions) 703-356-5005
City or town, state or province, country, and ZIP or foreign postal code BETHESDA MD 20814-1224		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 12,483,055	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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 <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	4,566	4,566		
	4 Dividends and interest from securities	7,068	7,068		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain			0	
	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) STMT 1	586,865	586,865	586,865	
	12 Total. Add lines 1 through 11	598,499	598,499	586,865	
	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits	57,289	26,190		31,099
	16a Legal fees (attach schedule) SEE STMT 2	225			225
	b Accounting fees (attach schedule) STMT 3	32,651			32,651
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) STMT 4	3,604	2		3,602
	19 Depreciation (attach schedule) and depletion STMT 5				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att sch) STMT 6	170	70		100
	24 Total operating and administrative expenses. Add lines 13 through 23	93,939	26,262	0	67,677
	25 Contributions, gifts, grants paid	634,882			634,882
	26 Total expenses and disbursements. Add lines 24 and 25	728,821	26,262	0	702,559
	27 Subtract line 26 from line 12	-130,322			
	a Excess of revenue over expenses and disbursements		572,237		
	b Net investment income (if negative, enter -0-)				
	c Adjusted net income (if negative, enter -0-)			586,865	

For Paperwork Reduction Act Notice, see instructions.

DAA

Form 990-PF (2018)

SCANNED MAR 19 2021

46 Received in DEC 14 2020
Batching Ogden

308

9 234

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			113,175	201,251	201,251
	2	Savings and temporary cash investments			477,089	1,331,013	1,331,013
	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 (att. schedule) ▶ SEE WRK	342,533				
		Less: allowance for doubtful accounts ▶	0		409,305	342,533	342,533
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments – U.S. and state government obligations (attach schedule)					
	b	Investments – corporate stock (attach schedule)					
	c	Investments – corporate bonds (attach schedule)					
	11	Investments – land, buildings, and equipment basis ▶					
	Less: accumulated depreciation (attach sch.) ▶						
12	Investments – mortgage loans						
13	Investments – other (attach schedule) SEE STATEMENT 7			3,427,659	2,411,402	10,608,258	
14	Land, buildings, and equipment basis ▶	18,012					
	Less: accumulated depreciation (attach sch.) ▶ STMT 8	18,012					
15	Other assets (describe ▶ SEE STATEMENT 9)						
16	Total assets (to be completed by all filers – see the instructions. Also, see page 1, item I)			4,427,228	4,286,199	12,483,055	
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 ▶ SEE STATEMENT 10)			11,552	845	
	23	Total liabilities (add lines 17 through 22)			11,552	845	
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					
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			1,300,108	1,300,108	
	29	Retained earnings, accumulated income, endowment, or other funds			3,115,568	2,985,246	
	30	Total net assets or fund balances (see instructions)			4,415,676	4,285,354	
	31	Total liabilities and net assets/fund balances (see instructions)			4,427,228	4,286,199	

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	4,415,676
2	Enter amount from Part I, line 27a	2	-130,322
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	4,285,354
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	4,285,354

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 N/A				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 10px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	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). See instructions. If (loss), enter -0- in Part I, line 8	<div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 10px;"> If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8 </div>	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 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	601,031	11,462,443	0.052435
2016	754,584	11,785,814	0.064025
2015	372,466	11,756,605	0.031681
2014	456,088	11,640,093	0.039183
2013	449,356	11,670,751	0.038503

2 Total of line 1, column (d)	2	0.225827
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	0.045165
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	12,043,681
5 Multiply line 4 by line 3	5	543,953
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	5,722
7 Add lines 5 and 6	7	549,675
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	702,559

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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	5,722
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	5,722
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	5,722
6 Credits/Payments		
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a	5,150
b Exempt foreign organizations – tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	6,500
d Backup withholding erroneously withheld	6d	76
7 Total credits and payments. Add lines 6a through 6d	7	11,726
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
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	6,004
11 Enter the amount of line 10 to be Credited to 2019 estimated tax 6,004 Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions MD, DC		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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	11	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	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X
14 The books are in care of ► NANCY GEWIRZ 7117 GLENBROOK ROAD Located at ► BETHESDA MD ZIP+4 ► 20814-1224 Telephone no ► 301-951-7117		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – check here and enter the amount of tax-exempt interest received or accrued during the year	15	
16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ►	16	X

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

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

	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	N/A	1b
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?	N/A	1c
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? If "Yes," list the years ► 20 , 20 , 20 , 20	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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)	N/A	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?	<input checked="" type="checkbox"/> Yes <input 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)		3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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

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. Organizations relying on a current notice regarding disaster assistance, check here	N/A <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? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No	
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
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870		X
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
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. 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
CARL GEWIRZ 7117 GLENBROOK ROAD BETHESDA MD 20814-1224	DIR/PRES 20.00	0	0	0
NANCY GEWIRZ 7117 GLENBROOK ROAD BETHESDA MD 20814-1224	DIRECTOR 0.50	0	0	0
VICTORIA GEWIRZ 48 SWARTHMORE ROAD WELLESLEY MA 02482-6609	DIRECTOR 2.50	0	56,815	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

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

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	▶

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	0
b	Average of monthly cash balances	1b	1,220,195
c	Fair market value of all other assets (see instructions)	1c	11,006,892
d	Total (add lines 1a, b, and c)	1d	12,227,087
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) SEE STATEMENT 11	1e	6,105,893
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	12,227,087
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	183,406
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	12,043,681
6	Minimum investment return. Enter 5% of line 5	6	602,184

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	602,184
2a	Tax on investment income for 2018 from Part VI, line 5	2a	5,722
b	Income tax for 2018 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	5,722
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	596,462
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	596,462
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	596,462

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	1a	702,559
a	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1b	
b	Program-related investments – total from Part IX-B		
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	702,559
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	5,722
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	696,837

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				596,462
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2018				
a From 2013				
b From 2014				
c From 2015				
d From 2016				174,483
e From 2017				38,189
f Total of lines 3a through e	212,672			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 702,559				
a Applied to 2017, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2018 distributable amount				596,462
e Remaining amount distributed out of corpus	106,097			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	318,769			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount – see instructions				
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount – see instructions				
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	318,769			
10 Analysis of line 9				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				174,483
d Excess from 2017				38,189
e Excess from 2018				106,097

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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
2a 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))
SEE STATEMENT 12

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
SEE STATEMENT 13

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
N/A

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

c Any submission deadlines
N/A

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
A SAFE PLACE 24 AMELIA DRIVE NANTUCKET MA 02554	NONE	501(C)(3)	PROMOTE DOMESTIC VIOLENCE REDUCTION.	150
ADAS ISRAEL CONGREGATION 2850 QUEBEC STREET NW WASHINGTON DC 20015	NONE	501(C)(3)	MORRIS HARITON SENIOR PROGRAM FUND	50,000
ALL. FOR NANTUCKET (SAVE OUR SOUND) 4 BARNSTABLE RD HYANNIS MA 02601	NONE	501(C)(3)	L-T PRESERVATION OF NANTUCKET SOUND	200
AMER FRIENDS OF MAGEN DAVID ADOM SO 352 SEVENTH AVE, STE 400 NEW YORK NY 10001	NONE	501(C)(3)	SUPPORT ISRAEL'S EMER MEDICAL SVSC	
AMERICAN FILM INSTITUTE 8633 COLESVILLE ROAD SILVER SPRING MD 20910	NONE	501(C)(3)	PROMOTION OF THE ARTS	
AMERICAN FRIENDS OF HEBREW UNIV. 5100 WISCONSIN AVE NW WASHINGTON DC 20016	NONE	501(C)(3)	SUPPORT HEBREW UNIV IN JERUSALEM	250
AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVE DALLAS TX 75231	NONE	501(C)(3)	PROMOTE MEDICAL RESEARCH	100
AMERICAN RED CROSS 2025 E STREET NW WASHINGTON DC 20006	NONE	501(C)(3)	ASSIST IN DISASTER AREAS	150
AMERICAN UNIVERSITY 4400 MASSACHUSETTS AVE N WASHINGTON DC 20016	NONE	501(C)(3)	JEWISH STUDIES PROGRAM	
ANTI-DEFAMATION LEAGUE 1100 CONNECTICUT AVE NW WASHINGTON DC 20036	NONE	501(C)(3)	PROMOTE HUMAN RIGHTS ISSUES	1,000
Total			3a	634,003
b Approved for future payment N/A				
Total			3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ART INSTITUTE OF CHICAGO 111 SOUTH MICHIGAN AVENUE CHICAGO IL 60603	NONE	501(C)(3) PROMOTE	THE ARTS	
ARTISTS ASSOC OF NANTUCKET BOX 1104 NANTUCKET MA 02554	NONE	501(C)(3) PROMOTION OF	THE ARTS	500
BETHESDA CHEVY CHASE RESCUE SQUAD 5020 BATTERY LANE BETHESDA MD 20814	NONE	501(C)(3) SUPPORT EMERGENCY MEDICAL	SERVICES	1,000
BIKE TO THE BEACH 1990 K ST NW LBYY 2 WASHINGTON DC 20006	NONE	501(C)(3) SUPPORT AUTISM AWARENESS		
BOSTON MED FLIGHT HANSCOM AFB, ROBINS ST, BEDFORD MA 01730	NONE	501(C)(3) SUPPORT CRITICAL CARE	TRANSPORT	300
BRIGHAM & WOMENS HOSPITAL 75 FRANCIS ST BOSTON MA 02115	NONE	501(C)(3) PROMOTE MEDICAL	RESEARCH	
BROOKLYN MUSEUM 200 EASTERN PKWY BROOKLYN NY 11238	NONE	501(C)(3) PROMOTION OF	THE ARTS	
BRUCE AND MARSHA MOSKOWITZ 225 LIST ROAD PALM BEACH FL 33480	FDN NONE	501(C)(3) PATIENT SAFETY & QUALITY HEALTHCARE		
CASEY HEALTH INSTITUTE 800 S. FREDERICK AVE #200 GAITHERSBURG MD 20877	NONE	501(C)(3) PROMOTE MEDICAL	RESEARCH	
CENTRAL UNION MISSION 65 MASSACHUSETTS AVE NW WASHINGTON DC 20001	NONE	501(C)(3) SUPPORT MEN'S	SOCIAL SERVICE AGENCY	35
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
CHESAPEAKE BAY FOUNDATION 6 HERNDAN AVE ANNAPOLIS MD 21403	NONE PROMOTE CONSERVATION AND EDUC OF BAY	501(C) (3)		150
CHILDRENS NATIONAL MEDICAL 111 MICHIGAN AVE NW WASHINGTON DC 20010	CENTER NONE SUPPORT	501(C) (3)	EDITH HARITON LIBRARY	500
COAST GUARD FOUNDATION 394 TAUGWONK RD STOWINGTON CT 06378	NONE SUPPORT US COAST GUARD AND	501(C) (3)	FAMILIES	100
CONGREGATION SHIRAT HA YAM PO BOX 1145 NANTUCKET MA 02554	NONE SUPPORT WORKS OF JEWISH CONGREGATION	501(C) (3)		4,600
DANA -FARBER CANCER INSTITUTE 450 BROOKLINE AVE BOSTON MA 02215	NONE MELANOMA CANCER RESEARCH	501(C) (3)		
DC ARTS CENTER 2438 18TH STREET, NW WASHINGTON DC 20009	NONE PROMOTION OF THE ARTS	501(C) (3)		
EGAN MARITIME INSTITUTE 4 WINTER STREET NANTUCKET MA 02554	NONE PROMOTE EDUC OF NANTUCKET'S HISTORY	501(C) (3)		100
FAIRWINDS - NANTUCKET COUNSELING 20 VESPER LN L-1 NANTUCKET MA 02554	NONE SUPPORT MENTAL HEALTH SERVICES	501(C) (3)		
FOOD AND FRIENDS 219 RIGGS ROAD NE WASHINGTON DC 20011	NONE PROVIDE FOOD TO AT RISK POPULATION	501(C) (3)		100
FRATERNAL ORDER OF POLICE - MD LODG 1506 LESLIE RD BALTIMORE MD 21222	NONE SUPPORT LAW ENFORCEMENT	501(C) (3)		25
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
GEORGE WASHINGTON UNIVERSITY 2300 H ST NW WASHINGTON DC 20037	NONE	501(C)(3)	RON AND JOY PAUL KIDNEY CENTER	
GEORGE WASHINGTON UNIVERSITY 2300 H ST NW WASHINGTON DC 20037	NONE	501(C)(3)	PATIENT CARE PROGRAM	
GEORGE WASHINGTON'S MOUNT VERNON PO BOX 240 MT. VERNON VA 22116	NONE	501(C)(3)	SUPPORT LIBRARY FOR STUDY OF G WASH.	100
GEORGETOWN UNIV MEDICAL CENTER 4000 RESERVOIR RD NW, 120 WASHINGTON DC 20005	NONE	501(C)(3)	LOMBARDI CANCER CENTER	10,000
GEORGETOWN UNIVERSITY MED CENTER 3800 RESERVOIR RD NW WASHINGTON DC 20007	NONE	501(C)(3)	LOMBARDI CANCER CENTER	
GUGGENHEIM MUSEUM 1071 5TH ST. NEW YORK NY 10128	NONE	501(C)(3)	PROMOTION OF THE ARTS	300
HEBREW HOME OF GREATER WASHINGTON 6121 MONTROSE ROAD ROCKVILLE MD 20852	NONE	501(C)(3)	PROVIDE CARE FOR THE ELDERLY	5,000
HEBREW HOME OF GREATER WASHINGTON 6121 MONTROSE ROAD ROCKVILLE MD 20852	NONE	501(C)(3)	SUPPORT POST ACUTE CARE CENTER	
HILLEL AT GWU 800 8TH ST NW WASHINGTON DC 20001	NONE	501(C)(3)	COMM ON COLLEGE CAMPUS	150,000
HILLEL AT GWU 800 8TH ST NW WASHINGTON DC 20001	NONE	501(C)(3)	DONATION TO PAY FOR BOOKKEEPER	25,000
Total			▶ 3a	
b Approved for future payment				
N/A				
Total			▶ 3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
HILLEL OF GREATER WASHINGTON 12230 WILKINS AVE ROCKVILLE MD 20852	NONE	501(C)(3)	PROMOTE JEWISH LIFE ON CAMPUS	500
HILLEL UNIV OF PENNSYLVANIA 215 S 39TH ST PHILADELPHIA PA 19104	NONE	501(C)(3)	PROMOTE JEWISH LIFE ON CAMPUS	250
HISTORICAL SOCIETY OF WASHINGTON 801 K STREET, NW WASHINGTON DC 20001	NONE	501(C)(3)	PRESERVE WASHINGTON DC HISTORY	4,000
HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG PL WASHINGTON DC 20024	NONE	501(C)(3)	PROMOTE EDUCATION ABOUT HOLOCAUST	2,000
HOUSE OF RUTH 5 THOMAS CIRCLE NW WASHINGTON DC 20005	NONE	501(C)(3)	CARE OF INDIGENT AND ABUSED WOMEN	200
HOUSING UNLIMITED INC. 1309 LAMBERTON DR. STE G1 SILVER SPRING MD 20902	NONE	501(C)(3)	HOUSING FOR PERSONS W/ PSYCH. DIS.	100
JAMES RENWICK ALLIANCE 4405 E WEST HWY #510 BETHESDA MD 20814	NONE	501(C)(3)	SUPPORT ART EXHIBITIONS	1,000
JAMES SMITHSONIAN SOCIETY 1000 JEFFERSON DR SW 4 FL WASHINGTON DC 20560	NONE	501(C)(3)	SUPPORT SMITHSONIAN MUSEUMS AND EDUC	
JEWISH COMM CENTER OF GREATER WASH 6125 MONTROSE RD ROCKVILLE MD 20852	NONE	501(C)(3)	PROVIDE SOC/REC/CULTURAL ACTIVITIES	500
JEWISH COUNCIL FOR THE AGING 12320 PARKLAWN DR. ROCKVILLE MD 20852	NONE	501(C)(3)	PROVIDE ASSISTANCE TO THE ELDERLY	250
Total			▶ 3a	
b Approved for future payment				
N/A				
Total			▶ 3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
JEWISH FEDERATION OF GREATER WASH 6101 MONTROSE RD ROCKVILLE MD 20852	NONE	501(C) (3)	PROMOTE SOCL/REL/EDUC OPPORTUNITIES	20,000
JEWISH FOUNDATION FOR GROUP HOMES 1500 E JEFFERSON STREET ROCKVILLE MD 20852	NONE	501(C) (3)	SUPPORT IND & INCLUSION OF DISABLED	500
JEWISH FOUNDATION FOR GROUP HOMES 1500 E JEFFERSON ST ROCKVILLE MD 20852	NONE	501(C) (3)	SUPPORT SERVICES FOR DISABLED	
JEWISH HISTORICAL SOCIETY 600 I STREET NW WASHINGTON DC 20001	NONE	501(C) (3)	PROMOTE RELIGIOUS HISTORY	4,000
JEWISH NATIONAL FUND 78 RANDALL AVE ROCKVILLE CENTER NY 11570	NONE	501(C) (3)	PROMOTE EDUCATION ABOUT ISRAEL	250
JEWISH SOCIAL SERVICE AGENCY 6123 MONTROSE RD ROCKVILLE MD 20852	NONE	501(C) (3)	PROVIDE SOCIAL SERVICES	200
JOHN F KENNEDY CENTER 2700 F ST NW WASHINGTON DC 20566	NONE	501(C) (3)	PROMOTION OF THE ARTS	25,000
JOHNS HOPKINS UNIVERSITY 1803 E MONUMENT ST 5TH FL BALTIMORE MD 21215	NONE	501(C) (3)	WILMER EYE	30,000
JOHNS HOPKINS UNIVERSITY 1803 E MONUMENT ST 5TH FL BALTIMORE MD 21215	NONE	501(C) (3)	SUPPORT UROLOGY DEPT	
LOOK GOOD FEEL BETTER FOUNDATION 1620 L ST NW 12TH FLOOR WASHINGTON DC 20036	NONE	501(C) (3)	SUPPORT WOMEN WITH CANCER	
Total				3a
b Approved for future payment				
N/A				
Total				3b

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
MACULAR DEGENERATION RESEARCH 22512 GATEWAY CENTER DR CLARKSBURG MD 20871	NONE	501(C)(3) SUPPORT MEDICAL	RESEARCH	300
MARCH OF DIMES 1275 MAMARONECK AVE WHITE PLAINS NY 10605	NONE	501(C)(3) PROMOTE	RESEARCH	30
MARLA CEELEY LAMB CANCER TRAVEL FUN 57 PROSPECT ST NANTUCKET MA 02554	NONE	501(C)(3) TRAVEL FUNDS FOR CANCER	PATIENTS	
MARYLAND PUBLIC TELEVISION 11767 OWINGS MILLS BLVD OWINGS MILLS MD 21117	NONE	501(C)(3) SUPPORT EDUCATIONAL	OFFERINGS	250
MAYO CLINIC 200 FIRST ST SW ROCHESTER MN 55905	NONE	501(C)(3) PROMOTE MEDICAL	RESEARCH	200
MEMORIAL SLOAN-KETTERING CANCER CEN 1275 YORK AVE NEW YORK NY 10065	NONE	501(C)(3) PROMOTE CANCER	RESEARCH	250
METROPOLITAN MUSEUM OF ART 1000 FIFTH AVE NEW YORK NY 10028	NONE	501(C)(3) PROMOTE	THE ARTS	200
MIAMI CANCER INST/BAPTIST HEALTH 6855 RED ROAD CORAL GABLES FL 33146	NONE	501(C)(3) PONTON ONCOLOGY FUND		
MONTGOMERY CTY FIREFIGHTERS 100 EDISON PARK DR GAITHERSBURG MD 20878	NONE	501(C)(3) SUPPORT FIREFIGHTERS		250
MUSEUM OF MODERN ART 11 WEST 53RD STREET NEW YORK NY 10019	NONE	501(C)(3) PROMOTE	THE ARTS	142
Total			3a	
b Approved for future payment N/A				
Total			3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
MUSEUM OF MODERN ART 11 WEST 53RD ST NEW YORK NY 10019	NONE	501(C)(3) PROMOTE THE ARTS		
NANTUCKET ATHENEUM 1 INDIA ST NANTUCKET MA 02554	NONE	501(C)(3) SUPPORT PUBLIC LIBRARY		250
NANTUCKET CONSERVATION FOUNDATION 118 CLIFF ROAD NANTUCKET MA 02554	NONE	501(C)(3) PROMOTE CONSERV OF NATURAL HABITATS		1,000
NANTUCKET COTTAGE HOSPITAL 57 PROSPECT ST NANTUCKET MA 02554	NONE	501(C)(3) SUPPORT HOSPITALS ABILITY TO PROV SV		1,000
NANTUCKET DREAMLAND FOUNDATION 17 SOUTH WATER ST NANTUCKET MA 02554	NONE	501(C)(3) PROMOTION OF THE THEATER ARTS		500
NANTUCKET HISTORICAL ASSOC PO BOX 1016 NANTUCKET MA 02554	NONE	501(C)(3) PROMOTE EDUC OF NANTUCKET'S HISTORY		500
NANTUCKET LAND COUNCIL 6 ASH LANE NANTUCKET MA 02554	NONE	501(C)(3) PROTECT NANTUCKET'S NATURAL WORLD		100
NANTUCKET LIGHTSHIP BASKET MUSEUM 49 UNION ST NANTUCKET MA 02554	NONE	501(C)(3) PROMOTION OF THE ARTS		160
NAT'L TR FOR HISTORIC PRESERVATION 1785 MASSACHUSETTS AVE WASHINGTON DC 20036	NONE	501(C)(3) PROMOTE EDUC OF SAVING HIST PLACES		100
NATIONAL AIR & SPACE INDEP AVE & 6TH ST SW WASHINGTON DC 20013	NONE	501(C)(3) PROMOTE EDUC ABOUT AIR & SPACE EXPLO		500
Total			▶ 3a	
b Approved for future payment				
N/A				
Total			▶ 3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
NATIONAL BUILDING MUSEUM 401 F ST NW WASHINGTON DC 20001	NONE	501(C)(3)	PROMOTION OF THE ARTS	200
NATIONAL GALLERY OF ART 2000B SOUTH CLUB DR LANDOVER MD 20785	NONE	501(C)(3)	PROMOTION OF THE ARTS	25,000
NATIONAL MUSEUM AMERICAN INDIAN PO BOX 96836 WASHINGTON DC 20090	NONE	501(C)(3)	PROMOTE EDUC OF AMERICAN INDIAN	
NATIONAL MUSEUM OF WOMEN IN ARTS 1250 NEW YORK AVE NW WASHINGTON DC 20005	NONE	501(C)(3)	PROMOTION OF THE ARTS	95
NEW SCHOOL UNIVERSITY (PARSONS) 72 FIFTH AVE, 3RD FLOOR NEW YORK NY 10011	NONE	501(C)(3)	PROMOTE EDUCATION FOR DESIGN	
NEWTON WELLESLEY HOSPITAL FOUNDATIO 2014 WASHINGTON ST NEWTON MA 02462	NONE	501(C)(3)	SUPPORT MEDICAL FACILITY	250
NORTON MUSEUM OF ART 1451 S OLIVE AVE WEST PALM BEACH FL 33401	NONE	501(C)(3)	PROMOTE THE ARTS	1,000
OHEV SHOLOM-NATL SYNAGOGUE 1600 JONQUIL ST NW WASHINGTON DC 20012	NONE	501(C)(3)	SUPPORT WORKS OF JEWISH CONGREGATION	
PROJECT HOPE 255 CARTER HALL LANE MILLWOOD VA 22646	NONE	501(C)(3)	LASTING SOLUTIONS TO HEALTH PROBLEMS	100
READ TO GROW 53 SCHOOL GROUND ROAD BRANFORD CT 06405	NONE	501(C)(3)	PROMOTE LITERACY FOR CHILDREN	
Total			3a	
b Approved for future payment N/A				
Total			3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SIBLEY MEMORIAL HOSPITAL 5255 LAUGHBORO RD NW WASHINGTON DC 20016	NONE	501(C)(3)	CANCER RESEARCH - DR KESSLER	60,000
SIXTH & I SYNAGOGUE 600 I ST NW WASHINGTON DC 20001	NONE	501(C)(3)	SUPPORT WORKS OF JEWISH CONGREGATION	
SMITHSONIAN AMERICAN ART MUSEUM MRC 970 BOX 37012 WASHINGTON DC 20013	NONE	501(C)(3)	PROMOTE THE ARTS	1,000
SMITHSONIAN CONTRIBUTING MEMBER PO BOX 37012 WASHINGTON DC 20013	NONE	501(C)(3)	PROMOTE ARTS AND EDUCATION	500
SMITHSONIAN HIRSHHORN MUSEUM 700 INDEPENDENCE AVE SW WASHINGTON DC 20560	NONE	501(C)(3)	PROMOTION OF THE ARTS	2,300
SO OTHERS MIGHT EAT 60 O ST NW WASHINGTON DC 20001	NONE	501(C)(3)	CLOTHING FOOD & HEALTHCARE FOR POOR	200
SUBURBAN HOSPITAL 8600 OLD GEORGETOWN RD BETHESDA MD 20814	NONE	501(C)(3)	DONATION FOR NURSING CARE SERVICES	1,000
TEXTILE MUSEUM AT GW UNIVERSITY 2320 S ST NW WASHINGTON DC 20008	NONE	501(C)(3)	PROMOTION OF THE ARTS	1,000
THE WHITNEY MUSEUM 99 GANSEVOORT ST NEW YORK NY 10014	NONE	501(C)(3)	PROMOTE THE ARTS	
TRUST FOR THE NATIONAL MALL PO BOX 96475 WASHINGTON DC 20090	NONE	501(C)(3)	SUPPORT RENEWING AND IMPROVING MALL	1,000
Total			3a	
b Approved for future payment N/A				
Total			3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
UNITED STATES OLYMPIC COMMITTEE PO BOX 15119 COLORADO SPRINGS CO 80903	NONE	501(C)(3)	SUPPORT US OLYMPIC ATHLETES	250
UNIVERSITY OF MD SCHOOL OF 655 W. BALTIMORE ST BALTIMORE MD 21201	MEDICINE NONE	501(C)(3)	SUPPORT EDUCATION	10,000
UNIVERSITY OF PENNSYLVANIA 3451 WALNUT ST PHILADELPHIA PA 19104	NONE	501(C)(3)	ABRAMS CANCER CENTER	500
UNIVERSITY OF PENNSYLVANIA 3451 WALNUT ST PHILADELPHIA PA 19104	NONE	501(C)(3)	SUPPORT ALUMNI MAGAZINE	
US BOTANIC GARDEN 245 FIRST ST SW WASHINGTON DC 20024	NONE	501(C)(3)	PROMOTE EDUC OF IMPORT OF PLANTS	250
US DEPUTY SHERIFF DEPT 2909 S SPRUCE WICHITA KS 67216	NONE	501(C)(3)	PROVIDE OFFICER SURVIVAL TRAINING	25
USA POWERLIFTNG PO BOX 668 COLUMBIA CITY IN 46725	NONE	501(C)(3)	SUPPORT AMATEUR ATHLETES	10,000
USO PO BOX 96860 WASHINGTON DC 20090	NONE	501(C)(3)	SUPPORT AID TO US TROOPS & FAMILIES	500
WASHINGTON HEBREW CONGREGATION 3935 MACOMB STREET NW WASHINGTON DC 20016	NONE	501(C)(3)	SUPPORT WORKS OF JEWISH CONGREGATION	6,881
WASHINGTON HOSPITAL CENTER 110 IRVING ST NW WASHINGTON DC 20010	FDN NONE	501(C)(3)	ZIRKIN HEART & VASCULAR HOSPITAL	50,000
Total			▶ 3a	
b Approved for future payment				
N/A				
Total			▶ 3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
WASHINGTON HOSPITAL CENTER 110 IRVING ST NW WASHINGTON DC 20010	FDN NONE	501(C) (3)	SUPPORT MEDICAL RESEARCH - DR BURMAN	
WASHINGTON HOSPITAL CENTER 110 IRVING ST NW WASHINGTON DC 20010	FDN NONE	501(C) (3)	DERMATOLOGY DEPT WELLNESS STUDY	
WASHINGTON HOSPITAL CENTER 110 IRVING ST NW WASHINGTON DC 20010	FDN NONE	501(C) (3)	SUPPORT MED RESEARCH - MEDSTAR HEART	
WASHINGTON NATIONAL CATHEDRAL 3101 WISCONSIN AVE NW WASHINGTON DC 20016	FDN NONE	501(C) (3)	SUPPORT RELIGIOUS CONGREGATION	
WETA PO BOX 96100 WASHINGTON DC 20090	NONE	501(C) (3)	PROMOTE EDUC AND ARTS PROGRAMMING	500
ZETA BETA TAU FOUNDATION 3905 VINCENNES RD INDIANAPOLIS IN 46268	NONE	501(C) (3)	PROMOTION OF EDUCATION	250
BETHESDA FIRE DEPARTMENT PO BOX 30384 BETHESDA MD 20824	NONE	501(C) (3)	SUPPORT FIREFIGHTERS	250
THE EISENHOWER FOUNDATION PO BOX 35 ABILENE KS 67410	NONE	501(C) (3)	SUPPORT MEMORIAL FOR GEN. EISENHOWER	150
NANTUCKET POLICE CHARITABLE 20 SOUTH WATER ST NANTUCKET MA 02554	ASSOC NONE	501(C) (3)	SUPPORT NANTUCKET POLICE DEPARTMENT	25
MARYLAND TROOPERS 1300 REISTERSTOWN RD PIKESVILLE MD 21208	NONE	501(C) (3)	SUPPORT MARYLAND STATE POLICE	35
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
NANTUCKET FIREMAN'S ASSOC 131 PLEASANT ST NANTUCKET MA 02554	NONE	501(C)(3) SUPPORT FIREFIGHTERS		750
INDIANA UNIVERSITY 107 S INDIANA AVE BLOOMINGTON IN 47405	NONE	501(C)(3) SUPPORT ALDO AMYLOIDOSIS	RESEARCH	100,000
AM. FRIENDS OF MAGEN DAVID 3300 PGA BOULEVARD #970 PALM BEACH GARDENS FL 334	ADOM SOC NONE	501(C)(3) SUPPORT ISRAEL'S DISASTER	REL. ORG	100
CESAR PELLI SCHOLARSHIP FUND PO BOX 202884 NEW HAVEN CT 06511	NONE	501(C)(3) PROVIDE SCHOLARSHIP FUNDS	AT YALE	10,000
YU YING PUBLIC CHARTER SCHOOL OF DC 220 TAYLOR ST NE WASHINGTON DC 20017	NONE	501(C)(3) SUPPORT EDUCATION		5,750
Total			▶ 3a	
b Approved for future payment				
N/A				
Total			▶ 3b	

Other Notes and Loans Receivable

Form **990-PF****2018**For calendar year 2018, or tax year beginning **12/01/18**, and ending **11/30/19**

Name

Employer Identification Number

THE CARL & NANCY GEWIRZ FUND, INC.**52-1387044****FORM 990-PF, PART II, LINE 7 - ADDITIONAL INFORMATION**

Name of borrower	Relationship to disqualified person
(1) JOHN HOSKINSON	NONE
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	

Original amount borrowed	Date of loan	Maturity date	Repayment terms	Interest rate
(1) 1,255,000	12/31/02	11/01/24	\$5,888/MO.	1.000
(2)				
(3)				
(4)				
(5)				
(6)				
(7)				
(8)				
(9)				
(10)				

Security provided by borrower	Purpose of loan
(1) 20.33% DORCHESTER HOUSE LP INTEREST	PURCHASE PARTNERSHIP INTEREST
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	

Consideration furnished by lender	Balance due at beginning of year	Balance due at end of year	Fair market value
(1) 0	409,305	342,533	342,533
(2)			
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			
(10)			
Totals	409,305	342,533	342,533

Form 990-PF - General Footnote**Description**

THE VALUES SHOWN IN STATEMENT 7 FOR PART II, LINE 13, REFLECT ESTIMATED VALUES FOR CHARTER ENTERPRISES, LLC AND DORCHESTER HOUSE ASSOCIATES, LLC BECAUSE THE ENTITY VALUES ARE TOO SMALL TO WARRANT THE COST OF A VALUATION. DORCHESTER HOUSE ASSOCIATES, LLC HOLD CLAIMS FOR REFUND OF MADOFF LOSSES WHICH ARE MINIMAL. CHARTER ENTERPRISES, LLC IS A VERY SMALL HOLDING OF 0.25%.

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
OIL & GAS ROYALTIES	\$ 545	\$ 545	\$ 545
RENTAL INCOME FROM PASS-THRU	569,133	569,133	569,133
THEFT LOSS RECOVERY, FROM K-1	15,769	15,769	15,769
CREDIT CARD REWARDS	10,960	10,960	10,960
SECT 1231 LOSS FROM PASS-THRU	-9,542	-9,542	-9,542
TOTAL	\$ 586,865	\$ 586,865	\$ 586,865

Statement 2 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
LEGAL	\$ 225	\$	\$	\$ 225
TOTAL	\$ 225	\$ 0	\$ 0	\$ 225

Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING	\$ 7,766	\$	\$	\$ 7,766
BOOKKEEPING	24,885			24,885
TOTAL	\$ 32,651	\$ 0	\$ 0	\$ 32,651

Federal Statements

Statement 4 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
OTHER TAXES	\$ 2	\$ 2	\$	
FEDERAL INCOME TAXES	3,602			3,602
TOTAL	\$ 3,604	\$ 2	\$ 0	\$ 3,602

Statement 5 - Form 990-PF, Part I, Line 19 - Depreciation

Date Acquired	Description	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
4/13/02	OFFICE FURNITURE	937	\$	937 200DB	7	\$	\$	\$
7/15/02	COMPUTER	2,809		2,809 200DB	5			
7/15/02	COMPUTER	2,809		2,809 200DB	5			
7/16/02	COMPUTER MONITORS	2,098		2,098 200DB	5			
7/19/02	COMPUTER RELATED EQUIPMENT	523		523 200DB	5			
8/07/02	OFFICE EQUIPMENT	567		567 200DB	7			
8/07/02	COMPUTER PERIPHERALS	755		755 200DB	5			
8/15/02	TELEPHONES	241		241 200DB	7			
8/08/02	SOFTWARE	399		399 S/L	3			
6/16/06	EQUIPMENT	3,180		3,180 200DB	7			
1/18/11	DELL HARD DRIVE	814		814 200DB	5			
1/20/11	SCANNER	565		565 200DB	5			

Federal Statements

Statement 5 - Form 990-PF, Part I, Line 19 - Depreciation (continued)

Date Acquired	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
APPLE COMPUTER 11/22/13	\$ 2,315	\$ 2,315	200DB	5	\$	\$	\$
TOTAL	\$ 18,012	\$ 18,012			\$ 0	\$ 0	\$ 0

Statement 6 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	
EXPENSES RELATED TO OIL AND G	33	33		
BANK CHARGES AND CREDIT CARD	37	37		
PUBLICATIONS	100			100
TOTAL	\$ 170	\$ 70	\$ 0	\$ 100

Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
1620 K STREET ASSOCIATES 52-6097909	\$ 1,256,699	\$ 1,219,330	MARKET	\$ 1,919,000
CHARTER ENTERPRISE LLC	2,682	-4,461	MARKET	30,416
DORCHESTER HOUSE ASSOC. LLC	1,744,784	829,982	MARKET	6,012,000
DORCHESTER HOUSE INVESTMENT	33,065	34,885	MARKET	43,842
KALORAMA WEST LLC	-85,603	-147,814	MARKET	1,559,000
QUEBEC HOUSE ASSOCIATES, LLC	476,032	479,480	MARKET	1,044,000
TOTAL	\$ 3,427,659	\$ 2,411,402		\$ 10,608,258

Federal Statements**Statement 8 - Form 990-PF, Part II, Line 14 - Land, Building, and Equipment**

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
EQUIPMENT AND SOFTWARE	\$	\$ 18,012	\$ 18,012	\$
TOTAL	\$ 0	\$ 18,012	\$ 18,012	\$ 0

Statement 9 - Form 990-PF, Part II, Line 15 - Other Assets

Description	Beginning of Year	End of Year	Fair Market Value
DEPOSITS	\$	\$	\$
TOTAL	\$ 0	\$ 0	\$ 0

Statement 10 - Form 990-PF, Part II, Line 22 - Other Liabilities

Description	Beginning of Year	End of Year
CREDIT CARD PAYABLE	\$ 10,000	\$
COMP PAYABLE	1,078	845
PAYROLL TAXES WITHHELD	474	0
TOTAL	\$ 11,552	\$ 845

Statement 11 - Form 990-PF, Part X, Line 1e - Reduction Claimed for Blockage Information**Description**

THE FUND OWNS A MINORITY INTEREST IN SEVERAL REAL ESTATE PARTNERSHIPS OR LLCs. A DISCOUNT FOR BLOCKAGE AND MINORITY INTEREST HAS BEEN USED. THE PERCENTAGES APPLIED TO THE VARIOUS ENTITIES RANGE FROM 36% TO 40% PER THE VALUATIONS PERFORMED BY VALUATION SERVICES, INC. IN 2018.

Statement 12 - Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000

Name of Manager	Amount
CARL GEWIRZ	\$
NANCY GEWIRZ	
TOTAL	\$ 0

Statement 13 - Form 990-PF, Part XV, Line 1b - Managers Who Own 10% or More Stock

Name of Manager	Amount
CARL GEWIRZ	\$
NANCY GEWIRZ	
TOTAL	\$ 0

Statement 14 - Form 990-PF, Part XVI-A, Line 11 - Other Revenue

Description	Business Code	Unrelated Amount	Exclusion Code	Exclusion Amount	Related Income
OIL & GAS ROYALTIES		\$	15	\$	545

Statement 14 - Form 990-PF, Part XVI-A, Line 11 - Other Revenue (continued)

Description	Business Code	Unrelated Amount	Exclusion Code	Exclusion Amount	Related Income
RENTAL INCOME FROM PASS-THR		\$	16	\$ 569,133	\$
THEFT LOSS RECOVERY, FROM K			16	15,769	
CREDIT CARD REWARDS			14	10,960	
SECT 1231 LOSS FROM PASS-TH			16	-9,542	
TOTAL		\$ 0		\$ 586,865	\$ 0