

EXTENDED TO NOVEMBER 16, 2020

Return of Private Foundation

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

- ▶ 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.

OMB No 1545-0047

2019

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

For calendar year 2019 or tax year beginning

, and ending

Name of foundation
THE ACHELIS & BODMAN FOUNDATION

Number and street (or P O box number if mail is not delivered to street address) Room/suite
420 LEXINGTON AVENUE 2803

City or town, state or province, country, and ZIP or foreign postal code
NEW YORK, NY 10170

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

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation **04**
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)
\$ 122,663,489. (Part I, column (d), must be on cash basis.)

J Accounting method: ☐ Cash ☐ Accrual
☒ Other (specify) **MODIFIED CASH**

A Employer identification number
13-6022018

B Telephone number
212-644-0322

C If exemption application is pending, check here ☐ **6**

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

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

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

Part I Analysis of Revenue and Expenses
(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

	(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 ☒ if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	490,656.	1,660,362.		STATEMENT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	3,116,344.			
b Gross sales price for all assets on line 6a	25,015,871.			
7 Capital gain net income (from Part IV, line 2)		7,845,594.		
8 Net short-term capital gain			N/A	
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income	4,816,950.	502,198.	0.	STATEMENT 2
12 Total. Add lines 1 through 11	8,423,950.	10,008,154.	0.	
13 Compensation of officers, directors, trustees, etc	310,000.	14,500.	0.	295,500.
14 Other employee salaries and wages	68,912.	6,891.	0.	62,021.
15 Pension plans, employee benefits	100,671.	10,067.	0.	90,604.
16a Legal fees STMT 3	1,667.	417.	0.	1,250.
b Accounting fees STMT 4	77,205.	38,603.	0.	38,602.
c Other professional fees STMT 5	253,603.	290,012.	0.	0.
17 Interest STMT 6		265,036.		
18 Taxes	119,134.	23,403.	0.	0.
19 Depreciation and depletion				
20 Occupancy	72,000.	7,200.	0.	64,800.
21 Travel, conferences, and meetings	9,723.	486.	0.	9,237.
22 Printing and publications	2,496.	125.	0.	2,371.
23 Other expenses STMT 7	67,808.	793,740.	0.	62,910.
24 Total operating and administrative expenses. Add lines 13 through 23	1,083,219.	1,450,480.	0.	627,295.
25 Contributions, gifts, grants paid	5,627,600.			5,627,600.
26 Total expenses and disbursements. Add lines 24 and 25	6,710,819.	1,450,480.	0.	6,254,895.
27 Subtract line 26 from line 12.				
a Excess of revenue over expenses and disbursements	1,713,131.			
b Net investment income (if negative, enter -0-)		8,557,674.		
c Adjusted net income (if negative, enter -0-)			0.	

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	264,697.	356,364.	356,364.
	2 Savings and temporary cash investments	6,109,932.	2,053,460.	2,053,460.
	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			
	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 8	7,033,080.	9,091,317.	9,091,317.
	c Investments - corporate bonds STMT 9	175,847.	336,397.	336,397.
	Liabilities	11 Investments - land, buildings, and equipment basis ▶		
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 10		95,090,827.	110,771,951.	110,771,951.
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ SECURITY DEPOSIT)		0.	54,000.	54,000.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		108,674,383.	122,663,489.	122,663,489.
17 Accounts payable and accrued expenses				
18 Grants payable				
Net Assets or Fund Balances	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.		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☒ X			
	24 Net assets without donor restrictions	108,674,383.	122,663,489.	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☐			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
	29 Total net assets or fund balances	108,674,383.	122,663,489.	
30 Total liabilities and net assets/fund balances	108,674,383.	122,663,489.		

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 29 (must agree with end-of-year figure reported on prior year's return)	1	108,674,383.
2 Enter amount from Part I, line 27a	2	1,713,131.
3 Other increases not included in line 2 (itemize) ▶ UNREALIZED GAIN ON INVESTMENTS	3	12,275,975.
4 Add lines 1, 2, and 3	4	122,663,489.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	122,663,489.

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Part IV Capital Gains and Losses for Tax on Investment Income

SEE ATTACHED STATEMENT

(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					
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	25,015,871.	19,295,979.	7,845,594.		
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(i) 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					
b					
c					
d					
e			7,845,594.		
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	7,845,594.	
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	If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	3,116,344.	

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))
2018	6,213,085.	117,708,408.	.052784
2017	6,279,134.	113,806,226.	.055174
2016	5,519,390.	103,536,499.	.053309
2015	5,137,777.	107,499,368.	.047794
2014	4,590,529.	108,417,460.	.042341

2 Total of line 1, column (d)	2	.251402
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	.050280
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	114,870,926.
5 Multiply line 4 by line 3	5	5,775,710.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	85,577.
7 Add lines 5 and 6	7	5,861,287.
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	6,254,895.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES				
b MAKAIRA OFFSHORE INVESTORS		P		
c HENGISTBRY FUND		P		
d LIMITED PARTNERSHIP GAINS (LOSSES)				
e TIFF SECONDARY PARTNERS - LOSS ON CLOSEOUT				
f ABRAMS CAPITAL PARTNERS - GAIN ON CLOSEOUT				
g LESS: AMOUNT ATTRIBUTABLE TO UBI				
h				
i				
j				
k				
l				
m				
n				
o				

(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 20,660,871.		17,544,527.	3,116,344.
b 2,580,000.		748,269.	1,831,731.
c 1,775,000.		1,003,183.	771,817.
d			3,095,390.
e			-954,906.
f			10,266.
g			-25,048.
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			** 3,116,344.
b			1,831,731.
c			771,817.
d			3,095,390.
e			-954,906.
f			10,266.
g			-25,048.
h			
i			
j			
k			
l			
m			
n			
o			

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	7,845,594.
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	3,116,344.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1.

Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b

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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)

5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2019 estimated tax payments and 2018 overpayment credited to 2019

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

7 Total credits and payments. Add lines 6a through 6d

8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

11 Enter the amount of line 10 to be: Credited to 2020 estimated tax

63,245. Refunded

Part VII A Statements Regarding Activities

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?

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.

c Did the foundation file Form 1120-POL for this year?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

If "Yes," attach a detailed description of the activities.

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

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

b If "Yes," has it filed a tax return on Form 990-T for this year?

N/A

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

If "Yes," attach the statement required by General Instruction T

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?

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

8a Enter the states to which the foundation reports or with which it is registered. See instructions.

NY

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

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 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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 WWW.ACHELISBODMAN.ORG	X	
14 The books are in care of THE FOUNDATION Telephone no. 212-644-0322 Located at 420 LEXINGTON AVENUE, NEW YORK, NY ZIP+4 10017		
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	N/A
16 At any time during calendar year 2019, 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?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here		X
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 2019?		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 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years	☐ Yes ☒ 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	
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?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		X

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Part VII Statements Regarding Activities for Which Form 4720 May Be Required (continued)**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))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

N/A

Organizations relying on a current notice regarding disaster assistance, check here

☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.☐ Yes ☒ No**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

N/A

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?**8** Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?☐ Yes ☒ No**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 11		290,000.	43,424.	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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
PATHSTONE - 24 FEDERAL STREET, 8TH FLOOR, BOSTON, MA 02110	INV. ADVISORY FEES	173,303.
MANICE & BUDD 420 LEXINGTON AVENUE, NEW YORK, NY 10017	RENT	72,000.
CONDON O'MEARA MCGINTY & DONNELLY - 1 BATTERY PARK PLAZA, 7TH FLOOR, NEW YORK, NY 10004	AUDIT/TAX SERVICES	54,205.
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	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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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	9,663,124.
b	Average of monthly cash balances	1b	4,789,275.
c	Fair market value of all other assets	1c	102,167,830.
d	Total (add lines 1a, b, and c)	1d	116,620,229.
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	116,620,229.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,749,303.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	114,870,926.
6	Minimum investment return. Enter 5% of line 5	6	5,743,546.

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	5,743,546.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	85,577.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	85,577.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	5,657,969.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	5,657,969.
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	5,657,969.

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	6,254,895.
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	6,254,895.
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	85,577.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	6,169,318.

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.

Form 990-PF (2019)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				5,657,969.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014	94,581.			
b From 2015	768,354.			
c From 2016	433,583.			
d From 2017	706,359.			
e From 2018	489,557.			
f Total of lines 3a through e	2,492,434.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$	6,254,895.			
a Applied to 2018, 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 2019 distributable amount				5,657,969.
e Remaining amount distributed out of corpus	596,926.			
5 Excess distributions carryover applied to 2019 (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	3,089,360.			
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 2018. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				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 2014 not applied on line 5 or line 7	94,581.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	2,994,779.			
10 Analysis of line 9:				
a Excess from 2015	768,354.			
b Excess from 2016	433,583.			
c Excess from 2017	706,359.			
d Excess from 2018	489,557.			
e Excess from 2019	596,926.			

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 2019, 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)

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).)

NONE

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: SEE STATEMENT 13

SEE STATEMENT 12

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

c Any submission deadlines:

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

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

Recipient 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				
SEE ATTACHMENT 420 LEXINGTON AVENUE NEW YORK, NY 10170	NONE	PC	GENERAL SUPPORT	5,627,600.
Total			3a	5,627,600.
b Approved for future payment				
NONE				
Total			3b	0.

Form 990-PF (2019)

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INTEREST & DIVIDENDS FROM SECURITIES	490,656.	0.	490,656.	490,656.	0.
TO PART I, LINE 4	490,656.	0.	490,656.	490,656.	0.

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INCOME FROM LIMITED PARTNERSHIPS	4,816,950.	0.	4,816,950.
INCOME FROM LIMITED PARTNERSHIPS	150,764.	150,764.	150,764.
LESS: AMOUNT ATTRIBUTABLE TO UBIT	351,434.	351,434.	351,434.
TOTAL TO FORM 990-PF, PART I, LINE 11	5,319,148.	502,198.	5,319,148.

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	1,667.	417.	0.	1,250.
TO FM 990-PF, PG 1, LN 16A	1,667.	417.	0.	1,250.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AUDITING AND TAX SERVICES	54,205.	27,103.	0.	27,102.
BOOKKEEPING SERVICES	23,000.	11,500.	0.	11,500.
TO FORM 990-PF, PG 1, LN 16B	77,205.	38,603.	0.	38,602.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	228,671.	228,671.	0.	0.
CUSTODIAL FEES	24,932.	24,932.	0.	0.
INVESTMENT ADVISORY FEE	0.	36,409.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	253,603.	290,012.	0.	0.

FORM 990-PF

TAXES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN WITHHOLDING TAXES PAID THROUGH PARTNERSHIPS LESS: AMOUNT ATTRIBUTED TO UBI	0.	21,372.	0.	0.
FOREIGN WITHHOLDING TAX ON INVESTMENTS	2,884.	2,884.	0.	0.
FEDERAL EXCISE TAX	116,000.	0.	0.	0.
NYS CORPORATION TAX	250.	250.	0.	0.
LESS: AMOUNT ATTRIBUTED TO UBI	0.	-250.	0.	0.
TO FORM 990-PF, PG 1, LN 18	119,134.	23,403.	0.	0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SUPPLIES	4,629.	231.	0.	4,398.
TELEPHONE	30,237.	1,512.	0.	28,725.
POSTAGE	1,269.	63.	0.	1,206.
MISCELLANEOUS	30,173.	3,017.	0.	27,156.
FILING FEES	1,500.	75.	0.	1,425.
LIMITED PARTNERSHIP EXPENSES LESS: AMOUNT ATTRIBUTABLE TO UBIT	0.	961,086.	0.	0.
TO FORM 990-PF, PG 1, LN 23	67,808.	793,740.	0.	62,910.

FORM 990-PF

CORPORATE STOCK

STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ADIENT PLC	47,409.	47,409.
ADVANCED ENERGY INDS INC.	35,600.	35,600.
AECOM	153,370.	153,370.
AERCAP HOLDINGS NV	243,913.	243,913.
AERIE PHARMACEUTICALS	12,568.	12,568.
AEROVIRONMENT INC.	33,340.	33,340.
AFFLIATED MANAGERS GROUP INC	108,637.	108,637.
AIR LEASE CORP	144,508.	144,508.
ALLIANCE DATA SYS CORP	161,792.	161,792.
AMBARELLA INC	81,150.	81,150.
AMERIPRISE FINANCIAL INC	426,444.	426,444.
ARROW ELECTRS INC	180,412.	180,412.
ASSURANT INC	190,459.	190,459.
ATARA BIOTHERAPEUTICS INC.	12,353.	12,353.
AVIS BUDGET GROUP INC	62,513.	62,513.
BOYD GAMING CORP	51,796.	51,796.
BROADCOM LTD	334,349.	334,349.
C A E INC COM	43,659.	43,659.
CARA THERAPEUTICS INC.	11,277.	11,277.
CARS.COM INC	4,277.	4,277.
CELANESE CORP - SER A	374,900.	374,900.
CENTENE CORP DEL	392,057.	392,057.
CLOVIS ONCOLOGY INC	15,637.	15,637.
COGNEX CORP	77,335.	77,335.
COMMSCOPE HOLDING CO INC	65,033.	65,033.
CROWN HLDGS INC	237,859.	237,859.
CUBIC CORP	47,360.	47,360.
CUMMINS INC	42,950.	42,950.
CYRUSONE INC	80,479.	80,479.
CYTOKINETICS INC	7,427.	7,427.
DISCOVERY COMMUNICATIONS - C	46,650.	46,650.
E O G RES INC	275,068.	275,068.
ESPERION THERAPEUTICS INC	27,430.	27,430.
EVOQUA WATER TECHNOLOGIES CORP.	29,373.	29,373.
EW SCRIPPS CO	14,139.	14,139.
FARO TECHNOLOGIES INC	31,469.	31,469.
FIBROGEN INC	17,156.	17,156.
FIREEYE INC	36,366.	36,366.
FLEXTRONICS INTL LTD	160,930.	160,930.
FORM FACTOR INC	35,060.	35,060.
GOODYEAR TIRE & RUBBER CO	90,437.	90,437.
GROUPON INC	8,006.	8,006.
HANESBRANDS INC.	135,981.	135,981.
HCA HOLDINGS INC	489,251.	489,251.
HELMRICH & PAYNE INCORPORATED	15,900.	15,900.
HERTZ GLOBAL HOLDINGS INC	37,139.	37,139.
HEXCEL CORP NEW COM	43,986.	43,986.
HIGHPOINT RESOURCES CORPORATION	7,351.	7,351.
I I - V I INC	44,512.	44,512.
IAC INTERACTIVECORP	74,733.	74,733.
IMMUNOGEN INC	9,700.	9,700.
INTERCEPT PHARMACEUTICALS INC	30,980.	30,980.

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INTERXION HOLDING NV	88,000.	88,000.
IONIS PHARMACEUTICALS	47,724.	47,724.
IRIDIUM COMMUNICATIONS INC	52,976.	52,976.
KANSAS CITY SOUTHERN	49,011.	49,011.
LAM RESH CORP	118,422.	118,422.
LAS VEGAS SANDS CORP.	51,780.	51,780.
LAZARD LTD	31,968.	31,968.
LEXICON PHARMACEUTICALS INC	2,697.	2,697.
LIBERTY SIRIUSXM GROUP	33,838.	33,838.
LINCOLN NATL CORP	286,376.	286,376.
LIONS GATE ENTERTAINMENT CORPORATION	4,965.	4,965.
LUMENTUM HOLDINGS INC	88,023.	88,023.
MACROGENICS INC	13,600.	13,600.
MADISON SQUARE GARDEN CO - WI	35,597.	35,597.
MEDICINES CO	24,208.	24,208.
MICROCHIP TECHNOLOGY INC	364,216.	364,216.
MYRIAD GENETICS INC	14,977.	14,977.
NLIGHT INC COM	27,378.	27,378.
O-I GLASS, INC.	44,690.	44,690.
P T C THERAPEUTICS INC	9,606.	9,606.
PLUG POWER, INC.	11,692.	11,692.
PORTOLA PHARMACEUTICALS INC	16,477.	16,477.
PROTHENA CORP PLC	6,332.	6,332.
Q O R V O INC	107,397.	107,397.
QEP RESOURCES INC.	9,900.	9,900.
QUANTA SVCS INC	151,197.	151,197.
QURATE RETAIL GROUP, INC.	94,542.	94,542.
RAYMOND JAMES FINANCIAL INC	39,362.	39,362.
REGENERON PHARMACEUTICALS INC	48,812.	48,812.
ROBERT HALF INTERNATIONAL INC	31,575.	31,575.
ROYAL CARIBBEAN CRUISES	93,457.	93,457.
SAREPTA THERAPEUTICS INC	17,420.	17,420.
SEATTLE GENETICS INC	59,415.	59,415.
SEAWORLD ENTERTAINMENT INC	36,784.	36,784.
SYNNEX CORP	172,721.	172,721.
TEGNA INC	36,718.	36,718.
TENABLE HLDGS INC COM	11,261.	11,261.
TENNECO INC	21,868.	21,868.
TRIMBLE NAV LTD	62,535.	62,535.
TUTOR PERINI CORPORATION	11,317.	11,317.
ULTRA CLEAN HOLDINGS	10,562.	10,562.
ULTRAGENYX PHARMACEUTICAL INC.	11,532.	11,532.
UNIFI INC	13,034.	13,034.
UNITED RENTALS INC	334,707.	334,707.
VIAVI SOLUTIONS INC	28,200.	28,200.
VISHAY INTERTECHNOLOGY INC	28,741.	28,741.
WERNER ENTERPRISES INC.	29,112.	29,112.
WESTERN DIGITAL CORP	377,774.	377,774.
WHIRLPOOL CORP	223,361.	223,361.
WORLD WRESTLING ENTERTAINMENT	35,030.	35,030.
XPO LOGISITICS, INC.	225,950.	225,950.

TOTAL TO FORM 990-PF, PART II, LINE 10B

9,091,317. 9,091,317.

FORM 990-PF

CORPORATE BONDS

STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SUNCOR ENERGY INC	336,397.	336,397.
TOTAL TO FORM 990-PF, PART II, LINE 10C	336,397.	336,397.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 10

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ALLIANCE BERNSTEIN	FMV	2,293,813.	2,293,813.
APOLLO EUROPEAN PRIN. FINANCE FUND III	FMV	889,889.	889,889.
ARKA INDIA FUND	FMV	2,283,934.	2,283,934.
ARTISAN INTL VALUE FUND	FMV	6,412,395.	6,412,395.
BRIGHTWOOD CAPITAL SBIC II LP	FMV	371,599.	371,599.
BROWN ADVISORY WINSLOW	FMV	7,859,571.	7,859,571.
CARLYLE INT'L ENERGY PARTNERS	FMV	809,877.	809,877.
CYPRUM INVESTORS IV AIV I, LP	FMV	482,390.	482,390.
CYPRUM INVESTORS IV, L.P.	FMV	563.	563.
DELAWARE EMERGING MARKETS	FMV	3,216,578.	3,216,578.
DISTRIBUTION RECEIVABLE	FMV	3,159,767.	3,159,767.
DORCHESTER CAPITAL SECONDARIES	FMV	935,915.	935,915.
ELLIOTT INTERNATIONAL	FMV	5,092,651.	5,092,651.
ENDOWMENT PRIVATE EQUITY PART.	FMV	25,395.	25,395.
FORTRESS INVESTMENT	FMV	2,087,478.	2,087,478.
FORWARD VENTURES IV LP	FMV	253,258.	253,258.
HENGISTBURY FUND	FMV	6,974,090.	6,974,090.
HIGH GROUND INVESTMENT MANAGEMENT FUND LTD	FMV	1,041,327.	1,041,327.
HIGHCLERE INTERNATIONAL	FMV	3,241,073.	3,241,073.
JOHCM INTERNATIONAL	FMV	1,826,803.	1,826,803.
LCP IX OFFSHORE FUND	FMV	444,339.	444,339.
MAKAIRA OFFSHORE INVESTORS	FMV	7,763,901.	7,763,901.
MCR DULLES	FMV	237,094.	237,094.
MCR HOSPITALITY	FMV	1,432,489.	1,432,489.
MCR TEXAS	FMV	614,488.	614,488.
NEW CANAAN FUNDING MEZZ. VI	FMV	1,382,413.	1,382,413.
PORTOLAN PILOT LONG	FMV	7,462,772.	7,462,772.
PRIVATE ADVISORS STABLE VALUE	FMV	2,039,327.	2,039,327.
RBC EMERGING MARKETS	FMV	3,053,269.	3,053,269.
RCP SECOND. OPPORT. FUND II LP	FMV	723,560.	723,560.
RIVERSIDE ACCELERATION CAPITAL FUND II, LP	FMV	44,558.	44,558.
SEACOAST CAPITAL	FMV	1,659,746.	1,659,746.
SILVER POINT CAPITAL OFFSHORE FUND, LTD	FMV	2,987,489.	2,987,489.
STEELHEAD PATHFINDER FUND	FMV	3,774,711.	3,774,711.
TIFF PARTNERS III L.P.	FMV	8,059.	8,059.
TIFF PRVT EQUITY PARTNERS 2013	FMV	2,632,949.	2,632,949.
TIFF PRVT EQUITY PARTNERS 2014	FMV	2,670,428.	2,670,428.

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TIFF PRVT EQUITY PARTNERS 2015	FMV	3,275,238.	3,275,238.
TIFF SECONDARY PARTNERS 2005	FMV	366,293.	366,293.
TIFF SECONDARY PARTNERS 2006	FMV	72,486.	72,486.
TIFF SECONDARY PARTNERS 2007	FMV	983,948.	983,948.
TIFF SECONDARY PARTNERS 2008	FMV	1,283,881.	1,283,881.
TIFF SECONDARY PARTNERS 2009	FMV	358,598.	358,598.
TIFF SECONDARY PARTNERS 2012	FMV	2,645,523.	2,645,523.
TIFF SHORT TERM	FMV	2,009,951.	2,009,951.
TIFF SPECIAL OPPORTUNITY FUND	FMV	1,468,452.	1,468,452.
VANGUARD ST BOND INDEX	FMV	1,651,523.	1,651,523.
VERDAD JAPAN FUND	FMV	2,001,982.	2,001,982.
WCM FOCUSED INT'L GROWTH	FMV	6,464,118.	6,464,118.
TOTAL TO FORM 990-PF, PART II, LINE 13		110,771,951.	110,771,951.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 11

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
RUSSELL P. PENNOYER 420 LEXINGTON AVENUE NEW YORK, NY 10170	PRESIDENT/TRUSTEE 3.00	20,000.	0.	0.
JOHN N. IRWIN III 420 LEXINGTON AVENUE NEW YORK, NY 10170	CHAIRMAN/TRUSTEE 3.00	0.	0.	0.
TATIANA POUSCHINE 420 LEXINGTON AVENUE NEW YORK, NY 10170	VICE PRESIDENT/TRUSTEE 3.00	0.	0.	0.
GEORGE MCCABE 420 LEXINGTON AVENUE NEW YORK, NY 10170	TRUSTEE 3.00	0.	0.	0.
HORACE I. CRARY, JR. 420 LEXINGTON AVENUE NEW YORK, NY 10170	TREASURER/TRUSTEE 3.00	0.	0.	0.
JOHN B. KRIEGER 420 LEXINGTON AVENUE NEW YORK, NY 10170	EXECUTIVE DIRECTOR/SECRETARY 40.00	270,000.	43,424.	0.
LESLIE LENKOWSKY 420 LEXINGTON AVENUE NEW YORK, NY 10170	TRUSTEE 3.00	0.	0.	0.
MAGDALENA ZAVALIA DE MIGUENS. 420 LEXINGTON AVENUE NEW YORK, NY 10170	TRUSTEE 3.00	0.	0.	0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

290,000.

43,424.

0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 12

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JOHN B. KRIEGER, EXECUTIVE DIRECTOR
420 LEXINGTON AVE, SUITE 2803
NEW YORK, NY 10170

TELEPHONE NUMBER

212-644-0322

FORM AND CONTENT OF APPLICATIONS

NONPROFIT ORGANIZATIONS BASED IN NEW YORK CITY AND NORTHERN NEW JERSEY THAT ARE TAX-EXEMPT UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE AND FALL WITHIN THE PROGRAM AREAS OF THE FOUNDATION ARE WELCOME TO SUBMIT AN INQUIRY OR PROPOSAL LETTER BY EMAIL TO APPLICATION@ACHELISBODMAN.ORG. (PLEASE DO NOT SEND FULL PROPOSALS UNLESS REQUESTED.)

AN INITIAL INQUIRY TO THE ACHELIS AND BODMAN FOUNDATION SHOULD INCLUDE ONLY THE FOLLOWING ITEMS:

1. A PROPOSAL LETTER THAT BRIEFLY SUMMARIZES THE HISTORY OF THE PROJECT, NEED, OBJECTIVES, TIME PERIOD, KEY STAFF, PROJECT BUDGET, AND EVALUATION PLAN.
2. LATEST ANNUAL REPORT.

ANY SUBMISSION DEADLINES

THERE ARE NO SUBMISSION DEADLINES.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FOUNDATION GENERALLY DOES NOT MAKE GRANTS FOR THE FOLLOWING PURPOSES OR PROGRAM AREAS:

- NONPROFIT ORGANIZATIONS OUTSIDE OF NEW YORK AND NEW JERSEY
- ANNUAL APPEALS, DINNER FUNCTIONS, AND FUNDRAISING EVENTS
- ENDOWMENTS AND CAPITAL CAMPAIGNS
- LOANS AND DEFICIT FINANCING
- DIRECT GRANTS TO INDIVIDUALS
- INDIVIDUAL DAY-CARE AND AFTER-SCHOOL PROGRAMS
- HOUSING
- ORGANIZATIONS OR PROJECTS BASED OUTSIDE THE U.S.
- SMALL ART, DANCE, MUSIC, AND THEATER GROUPS

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A - 2D (CONTINUATION)

STATEMENT 13

FORM AND CONTENT OF APPLICATIONS

3. LATEST COMPLETE AUDITED FINANCIAL STATEMENTS.
4. IRS 501(C)(3) TAX-EXEMPTION LETTER.

RESTRICTIONS AND LIMITATIONS ON AWARDS

- INDIVIDUAL K-12 SCHOOLS (EXCEPT CHARTER SCHOOLS)
- NATIONAL HEALTH AND MENTAL HEALTH ORGANIZATIONS
- GOVERNMENT AGENCIES OR NONPROFIT ORGANIZATIONS SIGNIFICANTLY FUNDED OR REIMBURSED BY GOVERNMENT AGENCIES