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Open to Public Inspection

Form 990-PF

Department of the Treasury  
Internal Revenue Service

## 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](http://www.irs.gov/Form990PF) for instructions and the latest information.

JAN 19 2020

OGDEN, UT

For calendar year 2019 or tax year beginning

, and ending

Name of foundation

A Employer identification number

THE KURT WEILL FOUNDATION FOR MUSIC

13-6139518

Number and street (or P.O. box number if mail is not delivered to street address)

Room/suite

B Telephone number

(212) 505-5240

7 EAST 20TH STREET, 3RD FLOOR

City or town, state or province, country, and ZIP or foreign postal code

NEW YORK, NY 10003-1106

C If exemption application is pending, check here ☐

G Check all that apply:

☐

Initial return

☐

Initial return of a former public charity

☐

Final return

☐

Amended return

☐

Address change

☐

Name change

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

H Check type of organization:

☒

Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust☐

Other taxable private foundation

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)

\$

37,169,951.

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

(Part I, column (d), must be on cash basis.)

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

| Part I Analysis of Revenue and Expenses<br>(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) |
|----------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| Revenue                                                                                                                                            | 1 Contributions, gifts, grants, etc., received                                                 |                                    |                           | N/A                     |                                                             |
|                                                                                                                                                    | 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 Dividends and interest from securities                                                       | 1,014,101.                         | 1,014,101.                |                         |                                                             |
|                                                                                                                                                    | 5a Gross rents                                                                                 |                                    |                           |                         |                                                             |
|                                                                                                                                                    | b Net rental income or (loss)                                                                  |                                    |                           |                         |                                                             |
|                                                                                                                                                    | 6a Net gain or (loss) from sale of assets not on line 10                                       | 247,345.                           |                           |                         |                                                             |
|                                                                                                                                                    | b Gross sales price for all assets on line 6a                                                  | 14,856,406.                        |                           |                         |                                                             |
|                                                                                                                                                    | 7 Capital gain net income (from Part IV, line 2)                                               |                                    | 247,345.                  |                         |                                                             |
|                                                                                                                                                    | 8 Net short-term capital gain                                                                  |                                    |                           |                         |                                                             |
|                                                                                                                                                    | 9 Income modifications                                                                         |                                    |                           |                         |                                                             |
|                                                                                                                                                    | 10a Gross sales less returns and allowances                                                    |                                    |                           |                         |                                                             |
| b Less Cost of goods sold                                                                                                                          |                                                                                                |                                    |                           |                         |                                                             |
| c Gross profit or (loss)                                                                                                                           |                                                                                                |                                    |                           |                         |                                                             |
| 11 Other income                                                                                                                                    | 866,827.                                                                                       | 866,827.                           |                           | STATEMENT 1             |                                                             |
| 12 Total. Add lines 1 through 11                                                                                                                   | 2,128,273.                                                                                     | 2,128,273.                         |                           |                         |                                                             |
| Operating and Administrative Expenses                                                                                                              | 13 Compensation of officers, directors, trustees, etc                                          | 161,007.                           | 3,590.                    |                         | 157,417.                                                    |
|                                                                                                                                                    | 14 Other employee salaries and wages                                                           | 491,062.                           | 2,055.                    |                         | 491,063.                                                    |
|                                                                                                                                                    | 15 Pension plans, employee benefits                                                            | 158,921.                           | 1,251.                    |                         | 157,670.                                                    |
|                                                                                                                                                    | 16a Legal fees STMT 2                                                                          | 536.                               | 536.                      |                         | 0.                                                          |
|                                                                                                                                                    | b Accounting fees STMT 3                                                                       | 18,300.                            | 1,830.                    |                         | 17,070.                                                     |
|                                                                                                                                                    | c Other professional fees STMT 4                                                               | 208,817.                           | 208,817.                  |                         | 0.                                                          |
|                                                                                                                                                    | 17 Interest                                                                                    |                                    |                           |                         |                                                             |
|                                                                                                                                                    | 18 Taxes STMT 5                                                                                | 52,568.                            | 14,745.                   |                         | 0.                                                          |
|                                                                                                                                                    | 19 Depreciation and depletion                                                                  | 18,433.                            | 0.                        |                         |                                                             |
|                                                                                                                                                    | 20 Occupancy                                                                                   | 39,079.                            | 502.                      |                         | 38,577.                                                     |
|                                                                                                                                                    | 21 Travel, conferences, and meetings                                                           | 53,768.                            | 382.                      |                         | 53,386.                                                     |
|                                                                                                                                                    | 22 Printing and publications                                                                   | 26,615.                            | 10.                       |                         | 26,605.                                                     |
|                                                                                                                                                    | 23 Other expenses STMT 6                                                                       | 134,873.                           | 124.                      |                         | 132,703.                                                    |
|                                                                                                                                                    | 24 Total operating and administrative expenses. Add lines 13 through 23                        | 1,363,979.                         | 233,842.                  |                         | 1,074,491.                                                  |
|                                                                                                                                                    | 25 Contributions, gifts, grants paid                                                           | 425,450.                           |                           |                         | 387,570.                                                    |
| 26 Total expenses and disbursements. Add lines 24 and 25                                                                                           | 1,789,429.                                                                                     | 233,842.                           |                           | 1,462,061.              |                                                             |
| 27 Subtract line 26 from line 12.                                                                                                                  |                                                                                                |                                    |                           |                         |                                                             |
| a Excess of revenue over expenses and disbursements                                                                                                | 338,844.                                                                                       |                                    |                           |                         |                                                             |
| b Net investment income (if negative, enter -0-)                                                                                                   |                                                                                                | 1,894,431.                         |                           |                         |                                                             |
| c Adjusted net income (if negative, enter -0-)                                                                                                     |                                                                                                |                                    | N/A                       |                         |                                                             |

**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 |
| <b>Assets</b>                                                                                    | 1 Cash - non-interest-bearing                                                                                               | 132,552.                                              | 173,344.       | 173,344.              |
|                                                                                                  | 2 Savings and temporary cash investments                                                                                    | 1,256,819.                                            | 1,053,680.     | 1,053,680.            |
|                                                                                                  | 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                                                                                     | 23,995.                                               | 24,405.        | 24,405.               |
|                                                                                                  | 10a Investments - U.S. and state government obligations STMT 8                                                              | 4,285,230.                                            | 4,137,739.     | 4,137,739.            |
|                                                                                                  | b Investments - corporate stock STMT 9                                                                                      | 23,717,959.                                           | 27,449,472.    | 27,449,472.           |
|                                                                                                  | c Investments - corporate bonds STMT 10                                                                                     | 1,855,609.                                            | 3,302,419.     | 3,302,419.            |
|                                                                                                  | <b>Liabilities</b>                                                                                                          | 11 Investments - land, buildings, and equipment basis |                |                       |
| Less: accumulated depreciation                                                                   |                                                                                                                             |                                                       |                |                       |
| 12 Investments - mortgage loans                                                                  |                                                                                                                             |                                                       |                |                       |
| 13 Investments - other                                                                           |                                                                                                                             |                                                       |                |                       |
| 14 Land, buildings, and equipment basis 800,248.                                                 |                                                                                                                             |                                                       |                |                       |
| Less: accumulated depreciation 578,868.                                                          |                                                                                                                             | 215,972.                                              | 221,380.       | 221,380.              |
| 15 Other assets (describe )                                                                      |                                                                                                                             | 748,960.                                              | 807,512.       | 807,512.              |
| 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I) |                                                                                                                             | 32,237,096.                                           | 37,169,951.    | 37,169,951.           |
| 17 Accounts payable and accrued expenses                                                         |                                                                                                                             | 65,701.                                               | 65,091.        |                       |
| 18 Grants payable                                                                                |                                                                                                                             | 76,820.                                               | 114,700.       |                       |
| 19 Deferred revenue                                                                              |                                                                                                                             |                                                       |                |                       |
| 20 Loans from officers, directors, trustees, and other disqualified persons                      |                                                                                                                             |                                                       |                |                       |
| 21 Mortgages and other notes payable                                                             |                                                                                                                             |                                                       |                |                       |
| 22 Other liabilities (describe STATEMENT 11)                                                     | 43,472.                                                                                                                     | 95,823.                                               |                |                       |
| 23 Total liabilities (add lines 17 through 22)                                                   | 185,993.                                                                                                                    | 275,614.                                              |                |                       |
| <b>Net Assets or Fund Balances</b>                                                               | Foundations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 24, 25, 29, and 30. |                                                       |                |                       |
|                                                                                                  | 24 Net assets without donor restrictions                                                                                    | 31,422,604.                                           | 36,202,436.    |                       |
|                                                                                                  | 25 Net assets with donor restrictions                                                                                       | 628,499.                                              | 691,901.       |                       |
|                                                                                                  | Foundations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 26 through 30.          |                                                       |                |                       |
|                                                                                                  | 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                                                                                        | 32,051,103.                                           | 36,894,337.    |                       |
|                                                                                                  | 30 Total liabilities and net assets/fund balances                                                                           | 32,237,096.                                           | 37,169,951.    |                       |

**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<br>(must agree with end-of-year figure reported on prior year's return) | 1 | 32,051,103. |
| 2 Enter amount from Part I, line 27a                                                                                                                            | 2 | 338,844.    |
| 3 Other increases not included in line 2 (itemize) SEE STATEMENT 7                                                                                              | 3 | 4,553,390.  |
| 4 Add lines 1, 2, and 3                                                                                                                                         | 4 | 36,943,337. |
| 5 Decreases not included in line 2 (itemize) PROVISION FOR DEFERRED FEDERAL EXCISE TAX EXPENSE                                                                  | 5 | 49,000.     |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29                                                         | 6 | 36,894,337. |

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**Part IV Capital Gains and Losses for Tax on Investment Income**

| (a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.) | (b) How acquired<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|-------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| <b>1a PUBLICLY TRADED SECURITIES</b>                                                                                                      |                                                  |                                      |                                  |
| <b>b</b>                                                                                                                                  |                                                  |                                      |                                  |
| <b>c</b>                                                                                                                                  |                                                  |                                      |                                  |
| <b>d</b>                                                                                                                                  |                                                  |                                      |                                  |
| <b>e</b>                                                                                                                                  |                                                  |                                      |                                  |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| <b>a</b> 14,856,406.  |                                            | 14,609,061.                                     | 247,345.                                     |
| <b>b</b>              |                                            |                                                 |                                              |
| <b>c</b>              |                                            |                                                 |                                              |
| <b>d</b>              |                                            |                                                 |                                              |
| <b>e</b>              |                                            |                                                 |                                              |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69. |                                      |                                                 | (l) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |
|----------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------|
| (i) FMV as of 12/31/69                                                                       | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any |                                                                                                 |
| <b>a</b>                                                                                     |                                      |                                                 | 247,345.                                                                                        |
| <b>b</b>                                                                                     |                                      |                                                 |                                                                                                 |
| <b>c</b>                                                                                     |                                      |                                                 |                                                                                                 |
| <b>d</b>                                                                                     |                                      |                                                 |                                                                                                 |
| <b>e</b>                                                                                     |                                      |                                                 |                                                                                                 |

|                                                                                                                                                                                        |                                                                                     |          |          |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|----------|----------|
| <b>2</b> Capital gain net income or (net capital loss)                                                                                                                                 | { If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 } | <b>2</b> | 247,345. |
| <b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c).<br>If (loss), enter -0- in Part I, line 8 | { }                                                                                 | <b>3</b> | N/A      |

**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<br>Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio<br>(col. (b) divided by col. (c)) |
|-------------------------------------------------------------------|---------------------------------------|-------------------------------------------|----------------------------------------------------------|
| 2018                                                              | 1,346,782.                            | 32,859,506.                               | .040986                                                  |
| 2017                                                              | 1,482,159.                            | 31,493,031.                               | .047063                                                  |
| 2016                                                              | 1,479,514.                            | 28,300,204.                               | .052279                                                  |
| 2015                                                              | 1,356,116.                            | 28,659,415.                               | .047318                                                  |
| 2014                                                              | 1,224,456.                            | 28,126,092.                               | .043535                                                  |

|                                                                                                                                                                                         |          |             |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-------------|
| <b>2</b> Total of line 1, column (d)                                                                                                                                                    | <b>2</b> | .231181     |
| <b>3</b> 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 | <b>3</b> | .046236     |
| <b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5                                                                                                   | <b>4</b> | 33,170,613. |
| <b>5</b> Multiply line 4 by line 3                                                                                                                                                      | <b>5</b> | 1,533,676.  |
| <b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                     | <b>6</b> | 18,944.     |
| <b>7</b> Add lines 5 and 6                                                                                                                                                              | <b>7</b> | 1,552,620.  |
| <b>8</b> Enter qualifying distributions from Part XII, line 4                                                                                                                           | <b>8</b> | 1,462,061.  |

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

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

|                                                                                                                                                                                                                                        |                                                                                                                              |    |         |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|----|---------|
| 1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1.<br>Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions) |                                                                                                                              |    |         |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b                                                                                      |                                                                                                                              |    |         |
| 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-)                   | 1  | 37,889. |
| 3                                                                                                                                                                                                                                      | Add lines 1 and 2                                                                                                            | 2  | 0.      |
| 4                                                                                                                                                                                                                                      | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)                 | 3  | 37,889. |
| 5                                                                                                                                                                                                                                      | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-                                      | 4  | 0.      |
| 6                                                                                                                                                                                                                                      | Credits/Payments:                                                                                                            | 5  | 37,889. |
| a                                                                                                                                                                                                                                      | 2019 estimated tax payments and 2018 overpayment credited to 2019                                                            | 6a | 34,000. |
| b                                                                                                                                                                                                                                      | Exempt foreign organizations - tax withheld at source                                                                        | 6b | 0.      |
| c                                                                                                                                                                                                                                      | Tax paid with application for extension of time to file (Form 8868)                                                          | 6c | 0.      |
| d                                                                                                                                                                                                                                      | Backup withholding erroneously withheld                                                                                      | 6d | 0.      |
| 7                                                                                                                                                                                                                                      | Total credits and payments. Add lines 6a through 6d                                                                          | 7  | 34,000. |
| 8                                                                                                                                                                                                                                      | Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached            | 8  | 0.      |
| 9                                                                                                                                                                                                                                      | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed                                                | 9  | 3,889.  |
| 10                                                                                                                                                                                                                                     | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid                                    | 10 |         |
| 11                                                                                                                                                                                                                                     | Enter the amount of line 10 to be: Credited to 2020 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/> | 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  |
| 1b 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  |
| 1c 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:<br>(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.                                                                                                                                                                                   |     | 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  |
| 4b 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:<br>• By language in the governing instrument, or<br>• 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. NY, DE                                                                                                                                                                                                                                   |     |    |
| 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 2019 or the tax year beginning in 2019? See the 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  |

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**Part VII-A** Statements Regarding Activities (continued)

- 11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions
- 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
- 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  
Website address **WWW.KWF.ORG**

|    | Yes | No |
|----|-----|----|
| 11 |     | X  |
| 12 |     | X  |
| 13 | X   |    |

- 14 The books are in care of **THE FOUNDATION** Telephone no. **(212) 505-5240**  
Located at **7 EAST 20TH STREET, 3RD FLOOR, NEW YORK, NY** ZIP+4 **10003**

- 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

|    | Yes | No |
|----|-----|----|
| 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.

- 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 ☐

- 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?

|    | Yes | No |
|----|-----|----|
| 1b |     | X  |
| 1c |     | X  |
| 2a |     |    |
| 2b |     |    |
| 3a |     |    |
| 3b |     |    |
| 4a |     | X  |
| 4b |     | 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? ☐ Yes ☒ No

If "Yes," list the years

- b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) 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?

- 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?

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**Part VII B** Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year, did the foundation pay or incur any amount to:

(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

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

☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?☒ Yes ☐ No

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

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870.

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?Yes ☒ No**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?☐ Yes ☒ No

|    | Yes | No |
|----|-----|----|
| 5a |     |    |
| 5b |     | X  |
| 6a |     | X  |
| 7a |     |    |
| 7b |     |    |
| 8  |     |    |

**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 13     |                                                           | 161,007.                                  | 33,837.                                                               | 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 |
|----------------------------------------------------------------------|-----------------------------------------------------------|------------------|-----------------------------------------------------------------------|---------------------------------------|
| BRADY SANSONE - 7 EAST 20TH STREET,<br>3RD FLOOR, NEW YORK, NY 10003 | DIRECTOR OF PROGRAMS<br>40.00                             | 100,541.         | 34,770.                                                               | 0.                                    |
| ELMAR JUCHEM - 7 EAST 20TH STREET,<br>3RD FLOOR, NEW YORK, NY 10003  | KWE MANAGING EDITOR<br>40.00                              | 98,500.          | 34,975.                                                               | 0.                                    |
| DAVE STEIN - 7 EAST 20TH STREET, 3RD<br>FLOOR, NEW YORK, NY 10003    | ARCHIVIST<br>40.00                                        | 90,541.          | 40,345.                                                               | 0.                                    |
| EDWARD HARSH - 7 EAST 20TH STREET,<br>3RD FLOOR, NEW YORK, NY 10003  | DIR. OF STRAT. INITIATIVES<br>30.00                       | 85,541.          | 28,379.                                                               | 0.                                    |
|                                                                      |                                                           |                  |                                                                       |                                       |
|                                                                      |                                                           |                  |                                                                       |                                       |

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 |
|--------------------------------------------------------------------------|---------------------|------------------|
| JP MORGAN SECURITIES<br>277 PARK AVENUE, NEW YORK, NY 10172              | INV. CONSULTANT     | 110,769.         |
| MORGAN STANLEY<br>1585 BROADWAY, NEW YORK, NY 10036                      | INV. CONSULTANT     | 98,048.          |
|                                                                          |                     |                  |
|                                                                          |                     |                  |
|                                                                          |                     |                  |
|                                                                          |                     |                  |
| 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 | 32,983,129. |
| b | Average of monthly cash balances                                                                            | 1b | 658,076.    |
| c | Fair market value of all other assets                                                                       | 1c | 34,544.     |
| d | <b>Total</b> (add lines 1a, b, and c)                                                                       | 1d | 33,675,749. |
| 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  | 33,675,749. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)   | 4  | 505,136.    |
| 5 | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5  | 33,170,613. |
| 6 | <b>Minimum investment return.</b> Enter 5% of line 5                                                        | 6  | 1,658,531.  |

**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  | 1,658,531. |
| 2a | Tax on investment income for 2019 from Part VI, line 5                                                    | 2a | 37,889.    |
| b  | Income tax for 2019. (This does not include the tax from Part VI.)                                        | 2b |            |
| c  | Add lines 2a and 2b                                                                                       | 2c | 37,889.    |
| 3  | Distributable amount before adjustments. Subtract line 2c from line 1                                     | 3  | 1,620,642. |
| 4  | Recoveries of amounts treated as qualifying distributions                                                 | 4  | 0.         |
| 5  | Add lines 3 and 4                                                                                         | 5  | 1,620,642. |
| 6  | Deduction from distributable amount (see instructions)                                                    | 6  | 0.         |
| 7  | <b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7  | 1,620,642. |

**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 | 1,462,061. |
| 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 | <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4                 | 4  | 1,462,061. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b | 5  | 0.         |
| 6 | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4                                                             | 6  | 1,462,061. |

**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.

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**Part XIII** Undistributed Income (see instructions)

|                                                                                                                                                                            | (a)<br>Corpus | (b)<br>Years prior to 2018 | (c)<br>2018 | (d)<br>2019 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2019 from Part XI, line 7                                                                                                                       |               |                            |             | 1,620,642.  |
| 2 Undistributed income, if any, as of the end of 2019                                                                                                                      |               |                            |             |             |
| a Enter amount for 2018 only                                                                                                                                               |               |                            | 899,732.    |             |
| b Total for prior years:                                                                                                                                                   |               | 0.                         |             |             |
| 3 Excess distributions carryover, if any, to 2019:                                                                                                                         |               |                            |             |             |
| a From 2014                                                                                                                                                                |               |                            |             |             |
| b From 2015                                                                                                                                                                |               |                            |             |             |
| c From 2016                                                                                                                                                                |               |                            |             |             |
| d From 2017                                                                                                                                                                |               |                            |             |             |
| e From 2018                                                                                                                                                                |               |                            |             |             |
| f Total of lines 3a through e                                                                                                                                              | 0.            |                            |             |             |
| 4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 1,462,061.                                                                                                 |               |                            |             |             |
| a Applied to 2018, but not more than line 2a                                                                                                                               |               |                            | 899,732.    |             |
| 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                                                                                                                                     |               |                            |             | 562,329.    |
| e Remaining amount distributed out of corpus                                                                                                                               | 0.            |                            |             |             |
| 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:                                                                                                                   | 0.            |                            |             |             |
| a Corpus: Add lines 3f, 4c, and 4e. Subtract line 5                                                                                                                        | 0.            |                            |             |             |
| b Prior years' undistributed income. Subtract line 4b from line 2b                                                                                                         |               | 0.                         |             |             |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed |               | 0.                         |             |             |
| d Subtract line 6c from line 6b. Taxable amount - see instructions                                                                                                         |               | 0.                         |             |             |
| e Undistributed income for 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                                                              |               |                            |             | 1,058,313.  |
| 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                                                                                                 | 0.            |                            |             |             |
| 9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a                                                                                              | 0.            |                            |             |             |
| 10 Analysis of line 9.                                                                                                                                                     |               |                            |             |             |
| a Excess from 2015                                                                                                                                                         |               |                            |             |             |
| b Excess from 2016                                                                                                                                                         |               |                            |             |             |
| c Excess from 2017                                                                                                                                                         |               |                            |             |             |
| d Excess from 2018                                                                                                                                                         |               |                            |             |             |
| e Excess from 2019                                                                                                                                                         |               |                            |             |             |

**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 14

**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<br>Name and address (home or business)                                       | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution                                | Amount   |
|----------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|--------------------------------------------------------------------|----------|
| a Paid during the year                                                                 |                                                                                                                    |                                      |                                                                    |          |
| ADAM VON ALMEN<br>442 W 160TH ST.<br>NEW YORK, NY 10032                                | NONE                                                                                                               | I                                    | SEMI-FINALIST PRIZE                                                | 500.     |
| AMERICAN LYRIC THEATER<br>410 W. 42ND STREET<br>NEW YORK, NY 10036                     | NONE                                                                                                               | PC                                   | 2018/2019 CLDP<br>SPONSORSHIP                                      | 15,000.  |
| AMY WEINTRAUB<br>700 PARK AVE.<br>NEW YORK, NY 10021                                   | NONE                                                                                                               | I                                    | FINALIST PRIZE - 2019<br>LOTTE LENYA<br>COMPETITION                | 2,000.   |
| AMY WEINTRAUB<br>700 PARK AVE.<br>NEW YORK, NY 10021                                   | NONE                                                                                                               | I                                    | LLC FINALS TRAVEL<br>STIPEND                                       | 750.     |
| ANDREA WOZNIAK<br>103 THAYER ST APT B32<br>NEW YORK, NY 10040                          | NONE                                                                                                               | I                                    | 2ND PRIZE 2019 LOTTE<br>LENYA COMPETITION                          | 15,000.  |
| Total                                                                                  |                                                                                                                    |                                      | SEE CONTINUATION SHEET(S) ▶ 3a                                     | 363,550. |
| b Approved for future payment                                                          |                                                                                                                    |                                      |                                                                    |          |
| CASTEL CAMERATA<br>CHEMIN DES PAVES 30 2000<br>SWITZERLAND                             | NONE                                                                                                               | FOREIGN<br>EQUIVALENT                | PROFESSIONAL<br>PERFORMANCE GRANT -<br>ZAUERNACHT                  | 6,000.   |
| OPERA NORTH 2<br>GRAND THEATRE 46 NEW BRIGGATE LEEDS<br>WEST YORKSHIRE, UNITED KINGDOM | NONE                                                                                                               | FOREIGN<br>EQUIVALENT                | PROFESSIONAL<br>PERFORMANCE GRANT -<br>STREET SCENE                | 50,000.  |
| STAATSOOPERETTE DRESDEN<br>EHLICHSTRAE<br>DRESDEN, GERMANY                             | NONE                                                                                                               | FOREIGN<br>EQUIVALENT                | 2019 MIDYEAR MEDIA<br>GRANT - ONE TOUCH OF<br>VENUS CAST RECORDING | 4,600.   |
| Total                                                                                  |                                                                                                                    |                                      | SEE CONTINUATION SHEET(S) ▶ 3b                                     | 72,200.  |

## Part XVI-A

| Unrelated business income |               | Excluded by section 512, 513, or 514 |               | (e)<br>Related or exempt<br>function income |
|---------------------------|---------------|--------------------------------------|---------------|---------------------------------------------|
| (a)<br>Business<br>code   | (b)<br>Amount | (c)<br>Exclu-<br>sion<br>code        | (d)<br>Amount |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               | 14                                   | 1,014,101.    |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               | 14                                   | 109.          |                                             |
|                           |               | 18                                   | 247,345.      |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               | 15                                   | 866,718.      |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           | 0.            |                                      | 2,128,273.    | 0                                           |

13
2,128,273

13 2,128,273.

## Part XVI-B

Line No.



## FORM 990-PF

## OTHER INCOME

## STATEMENT 1

| DESCRIPTION                           | (A)<br>REVENUE<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME |
|---------------------------------------|-----------------------------|-----------------------------------|-------------------------------|
| MISC. INCOME                          | 109.                        | 109.                              |                               |
| ROYALTIES                             | 866,718.                    | 866,718.                          |                               |
| TOTAL TO FORM 990-PF, PART I, LINE 11 | 866,827.                    | 866,827.                          |                               |

## FORM 990-PF

## LEGAL FEES

## STATEMENT 2

| DESCRIPTION                | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| LEGAL FEES                 | 536.                         | 536.                              |                               | 0.                            |
| TO FM 990-PF, PG 1, LN 16A | 536.                         | 536.                              |                               | 0.                            |

## FORM 990-PF

## ACCOUNTING FEES

## STATEMENT 3

| DESCRIPTION                                                          | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|----------------------------------------------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| CONDON O'MEARA MCGINTY &<br>DONNELLY LLP -<br>AUDIT AND TAX SERVICES | 0.<br>18,300.                | 0.<br>1,830.                      |                               | 0.<br>17,070.                 |
| TO FORM 990-PF, PG 1, LN 16B                                         | 18,300.                      | 1,830.                            |                               | 17,070.                       |

## FORM 990-PF

## OTHER PROFESSIONAL FEES

## STATEMENT 4

| DESCRIPTION                              | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|------------------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| MORGAN STANLEY -<br>INVESTMENT MGMT FEES | 110,769.                     | 110,769.                          |                               | 0.                            |
| JP MORGAN - INVESTMENT<br>MGMT FEES      | 98,048.                      | 98,048.                           |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 16C             | 208,817.                     | 208,817.                          |                               | 0.                            |

## FORM 990-PF

## TAXES

## STATEMENT 5

| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| FEDERAL EXCISE TAX          | 37,823.                      | 0.                                |                               | 0.                            |
| FOREIGN TAXES WITHHELD      | 14,745.                      | 14,745.                           |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 18 | 52,568.                      | 14,745.                           |                               | 0.                            |

## FORM 990-PF

## OTHER EXPENSES

## STATEMENT 6

| DESCRIPTION                         | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-------------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| LENYA COMPETITION<br>ADMINISTRATION | 38,455.                      | 0.                                |                               | 38,455.                       |
| GRANTS ADMINISTRATION               | 4,649.                       | 0.                                |                               | 4,649.                        |
| INSURANCE                           | 11,372.                      | 88.                               |                               | 11,284.                       |
| OFFICE                              | 25,863.                      | 36.                               |                               | 23,781.                       |
| MISCELLANEOUS                       | 8,663.                       | 0.                                |                               | 8,663.                        |
| COPYRIGHTS AMORTIZATION             | 5,435.                       | 0.                                |                               | 5,435.                        |
| BANK CHARGES                        | 3,985.                       | 0.                                |                               | 3,985.                        |
| ARCHIVE EXPENSES                    | 11,776.                      | 0.                                |                               | 11,776.                       |
| KWE EXPENSES                        | 24,675.                      | 0.                                |                               | 24,675.                       |
| TO FORM 990-PF, PG 1, LN 23         | 134,873.                     | 124.                              |                               | 132,703.                      |

## FORM 990-PF

## OTHER INCREASES IN NET ASSETS OR FUND BALANCES

## STATEMENT 7

| DESCRIPTION                                                                | AMOUNT     |
|----------------------------------------------------------------------------|------------|
| UNREALIZED GAIN ON INVESTMENTS                                             | 4,489,988. |
| UNREALIZED GAIN ON BENEFICIAL INTEREST IN CHARITABLE<br>REMAINDER UNITRUST | 63,402.    |
| TOTAL TO FORM 990-PF, PART III, LINE 3                                     | 4,553,390. |

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|             |                                            |             |
|-------------|--------------------------------------------|-------------|
| FORM 990-PF | U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS | STATEMENT 8 |
|-------------|--------------------------------------------|-------------|

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| DESCRIPTION                                      | U.S.<br>GOV'T | OTHER<br>GOV'T | BOOK VALUE | FAIR MARKET<br>VALUE |
|--------------------------------------------------|---------------|----------------|------------|----------------------|
| GOVERNMENT AND AGENCY OBLIGATIONS                | X             |                | 4,137,739. | 4,137,739.           |
| TOTAL U.S. GOVERNMENT OBLIGATIONS                |               |                | 4,137,739. | 4,137,739.           |
| TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS |               |                |            |                      |
| TOTAL TO FORM 990-PF, PART II, LINE 10A          |               |                | 4,137,739. | 4,137,739.           |

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|             |                 |             |
|-------------|-----------------|-------------|
| FORM 990-PF | CORPORATE STOCK | STATEMENT 9 |
|-------------|-----------------|-------------|

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| DESCRIPTION                                         | BOOK VALUE  | FAIR MARKET<br>VALUE |
|-----------------------------------------------------|-------------|----------------------|
| COMMON STOCKS (STATEMENT 8A)                        | 11,739,632. | 11,739,632.          |
| EXCHANGE-TRADED AND CLOSED-END FUNDS (STATEMENT 8B) | 4,688,189.  | 4,688,189.           |
| MUTUAL FUNDS (STATEMENT 8C)                         | 11,021,651. | 11,021,651.          |
| TOTAL TO FORM 990-PF, PART II, LINE 10B             | 27,449,472. | 27,449,472.          |

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|             |                 |              |
|-------------|-----------------|--------------|
| FORM 990-PF | CORPORATE BONDS | STATEMENT 10 |
|-------------|-----------------|--------------|

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| DESCRIPTION                             | BOOK VALUE | FAIR MARKET<br>VALUE |
|-----------------------------------------|------------|----------------------|
| CORPORATE BONDS (STATEMENT 9A)          | 3,302,419. | 3,302,419.           |
| TOTAL TO FORM 990-PF, PART II, LINE 10C | 3,302,419. | 3,302,419.           |

| FORM 990-PF                            | OTHER LIABILITIES | STATEMENT 11 |
|----------------------------------------|-------------------|--------------|
| DESCRIPTION                            | BOY AMOUNT        | EOY AMOUNT   |
| DEF. FED. EXCISE TAX                   | 43,000.           | 92,000.      |
| ACCRUED FEDERAL EXCISE TAX             | 472.              | 3,823.       |
| TOTAL TO FORM 990-PF, PART II, LINE 22 | 43,472.           | 95,823.      |

| FORM 990-PF                                             | OTHER ASSETS                  |                           | STATEMENT 12         |
|---------------------------------------------------------|-------------------------------|---------------------------|----------------------|
| DESCRIPTION                                             | BEGINNING OF<br>YR BOOK VALUE | END OF YEAR<br>BOOK VALUE | FAIR MARKET<br>VALUE |
| MUSIC COPYRIGHTS, NET                                   | 86,502.                       | 81,067.                   | 81,067.              |
| BENEFICIAL INTEREST IN CHARITABLE<br>REMAINDER UNITRUST | 628,499.                      | 691,901.                  | 691,901.             |
| INTEREST AND DIVIDENDS RECEIVABLE                       | 33,959.                       | 34,544.                   | 34,544.              |
| TO FORM 990-PF, PART II, LINE 15                        | 748,960.                      | 807,512.                  | 807,512.             |

FORM 990-PF

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

STATEMENT 13

| NAME AND ADDRESS                                                               | TITLE AND<br>AVRG HRS/WK              | COMPEN-<br>SATION | EMPLOYEE<br>BEN PLAN CONTRIB | EXPENSE<br>ACCOUNT |
|--------------------------------------------------------------------------------|---------------------------------------|-------------------|------------------------------|--------------------|
| KIM H. KOWALKE<br>7 EAST 20TH STREET, 3RD FLOOR<br>NEW YORK, NY 10003-1106     | PRESIDENT & CEO, TRUSTEE<br>40.00     | 149,507.          | 33,837.                      | 0.                 |
| THEODORE S. CHAPIN<br>7 EAST 20TH STREET, 3RD FLOOR<br>NEW YORK, NY 10003-1106 | BOARD CHAIR<br>0.25                   | 1,250.            | 0.                           | 0.                 |
| PHILIP GETTER, SR.<br>7 EAST 20TH STREET, 3RD FLOOR<br>NEW YORK, NY 10003-1106 | EXECUTIVE VICE CHAIR, TRUSTEE<br>0.25 | 1,500.            | 0.                           | 0.                 |
| GUY STERN<br>7 EAST 20TH STREET, 3RD FLOOR<br>NEW YORK, NY 10003-1106          | VICE CHAIR, TRUSTEE<br>0.25           | 500.              | 0.                           | 0.                 |
| SUSAN FEDER<br>7 EAST 20TH STREET, 3RD FLOOR<br>NEW YORK, NY 10003-1106        | SECRETARY, TRUSTEE<br>0.25            | 500.              | 0.                           | 0.                 |
| PENELOPE BOEHM<br>7 EAST 20TH STREET, 3RD FLOOR<br>NEW YORK, NY 10003-1106     | TREASURER<br>1.00                     | 4,000.            | 0.                           | 0.                 |
| ANDRE BISHOP<br>7 EAST 20TH STREET, 3RD FLOOR<br>NEW YORK, NY 10003-1106       | TRUSTEE<br>0.25                       | 250.              | 0.                           | 0.                 |
| COREY FIELD<br>7 EAST 20TH STREET, 3RD FLOOR<br>NEW YORK, NY 10003-1106        | TRUSTEE<br>0.25                       | 500.              | 0.                           | 0.                 |
| JAMES HOLMES<br>7 EAST 20TH STREET, 3RD FLOOR<br>NEW YORK, NY 10003-1106       | TRUSTEE<br>0.25                       | 250.              | 0.                           | 0.                 |
| WELZ KAUFFMAN<br>7 EAST 20TH STREET, 3RD FLOOR<br>NEW YORK, NY 10003-1106      | TRUSTEE<br>0.25                       | 250.              | 0.                           | 0.                 |

THE KURT WEILL FOUNDATION FOR MUSIC

13-6139518

|                               |         |      |    |    |
|-------------------------------|---------|------|----|----|
| TAZEWELL THOMPSON             | TRUSTEE |      |    |    |
| 7 EAST 20TH STREET, 3RD FLOOR | 0.25    | 500. | 0. | 0. |
| NEW YORK, NY 10003-1106       |         |      |    |    |

|                               |         |        |    |    |
|-------------------------------|---------|--------|----|----|
| JOANNE HUBBARD COSSA          | TRUSTEE |        |    |    |
| 7 EAST 20TH STREET, 3RD FLOOR | 0.25    | 1,250. | 0. | 0. |
| NEW YORK, NY 10003-1106       |         |        |    |    |

|                               |         |      |    |    |
|-------------------------------|---------|------|----|----|
| VICTORIA CLARK                | TRUSTEE |      |    |    |
| 7 EAST 20TH STREET, 3RD FLOOR | 0.25    | 500. | 0. | 0. |
| NEW YORK, NY 10003-1106       |         |      |    |    |

|                               |         |      |    |    |
|-------------------------------|---------|------|----|----|
| JEANINE TESORI                | TRUSTEE |      |    |    |
| 7 EAST 20TH STREET, 3RD FLOOR | 0.25    | 250. | 0. | 0. |
| NEW YORK, NY 10003-1106       |         |      |    |    |

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

|          |         |    |
|----------|---------|----|
| 161,007. | 33,837. | 0. |
|----------|---------|----|

FORM 990-PF

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

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

BRADY SANSONE, DIRECTOR OF PROGRAMS AND BUSINESS AFFAIRS  
7 EAST 20TH ST.  
NEW YORK, NY 10003

TELEPHONE NUMBER

(212) 505-5240

NAME OF GRANT PROGRAM

VISIT WWW.KWF.ORG FOR DETAILS REGARDING THE GRANT  
APPLICATION PROCESS

EMAIL ADDRESS

BSANSONE@KWF.ORG

FORM AND CONTENT OF APPLICATIONS

APPLICATIONS ARE SUBMITTED ONLINE VIA WWW.KWF.ORG

## ALL PROPOSALS MUST INCLUDE:

- A COMPLETED APPLICATION FORM.
- A DETAILED DESCRIPTION OF THE PROJECT.
- ORGANIZATIONS SHOULD PROVIDE A MISSION STATEMENT AND SUMMARY OF ACTIVITIES AND PAST ACHIEVEMENTS. INDIVIDUAL APPLICANTS SHOULD SUBMIT AN UP-TO-DATE BIOGRAPHY OR CURRICULUM VITAE.
- PROOF OF NOT-FOR-PROFIT STANDING.
- AN ITEMIZED BUDGET SHOWING ENTIRE PROJECT EXPENSES, INCOME, AND PROJECTED SOURCES OF FUNDING. APPLICANTS MUST NOTIFY THE FOUNDATION IF OTHER GRANTS ARE AWARDED.

ANY SUBMISSION DEADLINES

VARIOUS, SEE SPECIFIC DEADLINES ONLINE

RESTRICTIONS AND LIMITATIONS ON AWARDS

**Part XV** Supplementary Information (continued)**3a Grants and Contributions Paid During the Year**

| Recipient                                                       |  | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution                      | Amount   |
|-----------------------------------------------------------------|--|-----------------------------------------------------------------------------------------------------------|--------------------------------|-------------------------------------------------------|----------|
| Name and address (home or business)                             |  |                                                                                                           |                                |                                                       |          |
| ANDREA WOZNIAK<br>103 THAYER ST APT B32<br>NEW YORK, NY 10040   |  | NONE                                                                                                      | I                              | TRAVEL STIPEND                                        | 300.     |
| ANDREA WOZNIAK<br>103 THAYER ST APT B32<br>NEW YORK, NY 10040   |  | NONE                                                                                                      | I                              | LLC FINALS TRAVEL STIPEND                             | 750.     |
| BRITTANY BARATZ<br>647 WEST 169TH STREET<br>NEW YORK, NY 10032  |  | NONE                                                                                                      | I                              | SEMI-FINALIST PRIZE                                   | 500.     |
| CAROLYN BACON<br>400 E 21ST STREET #6C<br>BROOKLYN, NY 11226    |  | NONE                                                                                                      | I                              | FINALIST PRIZE - 2019 LOTTE LENYA COMPETITION         | 2,000.   |
| CAROLYN BACON<br>400 E 21ST STREET #6C<br>BROOKLYN, NY 11226    |  | NONE                                                                                                      | I                              | LLC FINALS TRAVEL STIPEND                             | 750.     |
| CLAIRE LEYDEN<br>815 W 181ST ST, #4H<br>NEW YORK, NY 10033      |  | NONE                                                                                                      | I                              | SEMI-FINALIST PRIZE                                   | 500.     |
| COLLEGE LIGHT OPERA COMPANY<br>PO BOX 906<br>PALMOUTH, MA 02541 |  | NONE                                                                                                      | PC                             | 2019 COLLEGE/UNIVERSITY GRANT - KNICKERBOCKER HOLIDAY | 8,000.   |
| <b>Total from continuation sheets</b>                           |  |                                                                                                           |                                |                                                       | 330,300. |

**Part XV** Supplementary Information (continued)**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business)                        | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution                             | Amount  |
|-------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------------------|---------|
|                                                                         |                                                                                                                    |                                      |                                                                 |         |
| COLLEGE LIGHT OPERA COMPANY<br>PO BOX 906<br>FALMOUTH, MA 02541         | NONE                                                                                                               | PC                                   | 2019 KURT WEILL/LOTTE LENYA ARTIST SPONSORSHIP -<br>PAULA BERRY | 5,000.  |
| DANIEL BERRYMAN<br>725 W. 172ND STREET<br>NEW YORK, NY 10032            | NONE                                                                                                               | I                                    | 1ST PRIZE - 2019 LOTTE LENYA COMPETITION                        | 20,000. |
| DANIEL BERRYMAN<br>725 W. 172ND STREET<br>NEW YORK, NY 10032            | NONE                                                                                                               | I                                    | LLC FINALS TRAVEL STIPEND                                       | 750.    |
| DANIELLE BECKVERMIT<br>12 BELVEDERE ST<br>KINGSTON, NY 12401            | NONE                                                                                                               | I                                    | FINALIST PRIZE - 2019 LOTTE LENYA COMPETITION                   | 2,000.  |
| DANIELLE BECKVERMIT<br>12 BELVEDERE ST<br>KINGSTON, NY 12401            | NONE                                                                                                               | I                                    | TRAVEL STIPEND                                                  | 300.    |
| DANIELLE BECKVERMIT<br>12 BELVEDERE ST<br>KINGSTON, NY 12401            | NONE                                                                                                               | I                                    | LLC FINALS TRAVEL STIPEND                                       | 750.    |
| ELSIE WAGNER SHERER<br>117 W. 70TH STREET, RM 705<br>NEW YORK, NY 10023 | NONE                                                                                                               | I                                    | EMERGING TALENT AWARD                                           | 500.    |

**Total from continuation sheets**

**Part XV** Supplementary Information (continued)**3a Grants and Contributions Paid During the Year**

| Recipient                                                                               |      | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution                                       | Amount  |
|-----------------------------------------------------------------------------------------|------|-----------------------------------------------------------------------------------------------------------|--------------------------------|------------------------------------------------------------------------|---------|
| Name and address (home or business)                                                     |      |                                                                                                           |                                |                                                                        |         |
| EMILY RICHMOND POLLOCK<br>83 DEAN STREET<br>BELMONT, MA 02478                           | NONE | I                                                                                                         |                                | KURT WEILL ARTICLE PRIZE                                               | 2,000.  |
| ENGLISH TOURING OPERA<br>50 BRITTON ST., 3RD FL.<br>LONDON, UNITED KINGDOM EC1M 5UP     | NONE | FOREIGN EQUIVALENT                                                                                        |                                | PROFESSIONAL PRODUCTION GRANT - DER SILBERSEE                          | 20,000. |
| FESTIVAL D'AIX<br>PALAIS DE L'ANCIEN ARCHEVECHE<br>AIX-EN-PROVENCE, PARIS, FRANCE 13100 | NONE | FOREIGN EQUIVALENT                                                                                        |                                | PROFESSIONAL PERFORMANCE GRANT - AUFSTIEG UND FALL DER STADT MAHAGONNY | 45,000. |
| ISSAC FRISHMAN<br>APT. 309<br>DOWNERS GROVE, IL 60516                                   | NONE | I                                                                                                         |                                | GRACE KEAGY AWARD                                                      | 500.    |
| JENNA BARBIERI<br>8817 36TH AVENUE<br>COLLEGE PARK, MD 20740                            | NONE | I                                                                                                         |                                | EMERGING TALENT AWARD                                                  | 500.    |
| JEREMY WEISS<br>1261 S ADAMS ST<br>BLOOMINGTON, IN 47403                                | NONE | I                                                                                                         |                                | CAROLYN WEBER AWARD - 2019 LOTTE LENYA COMPETITION                     | 3,500.  |
| JEREMY WEISS<br>1261 S ADAMS ST<br>BLOOMINGTON, IN 47403                                | NONE | I                                                                                                         |                                | TRAVEL STIPEND                                                         | 300.    |
| <b>Total from continuation sheets</b>                                                   |      |                                                                                                           |                                |                                                                        |         |

**Part XV** Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

| 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  |
|----------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------------------------|---------|
| Recipient                                                            |                                                                                                           |                                |                                                    |         |
| JEREMY WEISS<br>1261 S ADAMS ST<br>BLOOMINGTON, IN 47403             | NONE                                                                                                      | I                              | LLC FINALS TRAVEL STIPEND                          | 750.    |
| JESSE LEONG<br>2946 HARRISON AVE, APT. 2<br>CINCINNATI, OH 45211     | NONE                                                                                                      | I                              | JULIUS RUDEL/KURT WEILL CONDUCTING FELLOWSHIP      | 10,500. |
| JESSICA FISHENFELD<br>255-22 WEST END DR<br>GREAT NECK, NY 11020     | NONE                                                                                                      | I                              | SEMI-FINALIST PRIZE                                | 500.    |
| JONAH HOSKINS<br>2216 HUNTER DRIVE<br>SARATOGA SPRINGS, UT 84045     | NONE                                                                                                      | I                              | LYS SYMONETTE AWARD - 2019 LOTTE LENYA COMPETITION | 3,500.  |
| JONAH HOSKINS<br>2216 HUNTER DRIVE<br>SARATOGA SPRINGS, UT 84045     | NONE                                                                                                      | I                              | TRAVEL STIPEND                                     | 300.    |
| JONAH HOSKINS<br>2216 HUNTER DRIVE<br>SARATOGA SPRINGS, UT 84045     | NONE                                                                                                      | I                              | LLC FINALS TRAVEL STIPEND                          | 750.    |
| JONATHAN HELLER<br>30 PEACHTREE LANE<br>HUNTINGTON STATION, NY 11746 | NONE                                                                                                      | I                              | FINALIST PRIZE - 2019 LOTTE LENYA COMPETITION      | 2,000.  |
| <b>Total from continuation sheets</b>                                |                                                                                                           |                                |                                                    |         |

**Part IV** Supplementary Information (continued)**3a Grants and Contributions Paid During the Year**

| Recipient                                                               |      | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution                                        | Amount |
|-------------------------------------------------------------------------|------|-----------------------------------------------------------------------------------------------------------|--------------------------------|-------------------------------------------------------------------------|--------|
| Name and address (home or business)                                     |      |                                                                                                           |                                |                                                                         |        |
| JONATHAN HELLER<br>30 PEACHTREE LANE<br>HUNTINGTON STATION, NY 11746    | NONE | I                                                                                                         | II                             | LLC FINALS TRAVEL STIPEND                                               | 750.   |
| KATHERINE RIDDLE<br>8715 FIRST AVE, APT 517C<br>SILVER SPRING, MD 20910 | NONE | I                                                                                                         | I                              | MARC BLITZSTEIN AWARD - 2019 LOTTE LENYA COMPETITION                    | 3,500. |
| KATHERINE RIDDLE<br>8715 FIRST AVE, APT 517C<br>SILVER SPRING, MD 20910 | NONE | I                                                                                                         | I                              | SEMIFINALS STIPEND                                                      | 300.   |
| KATHERINE RIDDLE<br>8715 FIRST AVE, APT 517C<br>SILVER SPRING, MD 20910 | NONE | I                                                                                                         | I                              | LLC FINALS TRAVEL STIPEND                                               | 750.   |
| KATHRYN KALLAUS<br>5915 S. BRIARWOOD DRIVE<br>CRYSTAL LAKE, IL 60014    | NONE | I                                                                                                         | I                              | EMERGING TALENT AWARD                                                   | 500.   |
| KAYLEE TERRELL<br>613 RYE RIDGE RD<br>CARY, NC 27519                    | NONE | I                                                                                                         | I                              | EMERGING TALENT AWARD                                                   | 500.   |
| KURT WEILL FEST<br>EBERTALLEE 63<br>DESSAU ROLAU, GERMANY 06840         | NONE |                                                                                                           | FOREIGN EQUIVALENT             | PROFESSIONAL PERFORMANCE GRANT - SYMPHONY NO. 2, TRAINS BOUND FOR GLORY | 7,000. |
| <b>Total from continuation sheets</b>                                   |      |                                                                                                           |                                |                                                                         |        |

**Part XV Supplementary Information** (continued)

| 3a Grants and Contributions Paid During the Year                                    |                                     | 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  |
|-------------------------------------------------------------------------------------|-------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|---------|
| Recipient                                                                           | Name and address (home or business) |                                                                                                           |                                |                                  |         |
| KYLE BIELFIELD LLC<br>10720 S.W. 74TH COURT<br>MIAMI, FL 33156                      |                                     | NONE                                                                                                      | I                              | SEMI-FINALIST PRIZE              | 500.    |
| KYLE BIELFIELD LLC<br>10720 S.W. 74TH COURT<br>MIAMI, FL 33156                      |                                     | NONE                                                                                                      | I                              | TRAVEL STIPEND                   | 750.    |
| LEE METAXA<br>1403 DESERT WILLOW PLACE<br>CEDAR PARK, TX 78613                      |                                     | NONE                                                                                                      | I                              | EMERGING TALENT AWARD            | 500.    |
| LILY ARBISSER<br>33-40 81ST ST. #2<br>JACKSON HEIGHTS, NY 11372                     |                                     | NONE                                                                                                      | I                              | SEMI-FINALIST PRIZE              | 500.    |
| LONDON SYMPHONY ORCHESTRA<br>BARBICAN CENTER, SILK STREET<br>LONDON, UNITED KINGDOM |                                     | NONE                                                                                                      | FOREIGN EQUIVALENT             | PROFESSIONAL PERFORMANCE         | 15,000. |
| MARIA VASILEVSKAYA<br>328 E MAIN STREET<br>ROCHESTER, NY 14604                      |                                     | NONE                                                                                                      | I                              | SEMI-FINALIST PRIZE              | 500.    |
| MARIA VASILEVSKAYA<br>328 E MAIN STREET<br>ROCHESTER, NY 14604                      |                                     | NONE                                                                                                      | I                              | TRAVEL STIPEND                   | 300.    |
| <b>Total from continuation sheets</b>                                               |                                     |                                                                                                           |                                |                                  |         |

**Part XV** Supplementary Information (continued)**3a Grants and Contributions Paid During the Year**

| 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  |
|------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|---------------------------------------------------|---------|
|                                                                  |                                                                                                           |                                |                                                   |         |
| MASTERSVOICES<br>1441 BROADWAY, SUITE 3024<br>NEW YORK, NY 10018 | NONE                                                                                                      | PC                             | PROFESSIONAL PERFORMANCE GRANT - LADY IN THE DARK | 35,000. |
| MAXWELL LEVY<br>10 WATCH HILL ROAD<br>PLEASANTVILLE, NY 10570    | NONE                                                                                                      | I                              | EMERGING TALENT AWARD                             | 500.    |
| MICHAEL HEWITT<br>8484 16TH STREET<br>SILVER SPRING, MD 20190    | NONE                                                                                                      | I                              | SEMI-FINALIST PRIZE                               | 500.    |
| MICHAEL HEWITT<br>8484 16TH STREET<br>SILVER SPRING, MD 20190    | NONE                                                                                                      | I                              | TRAVEL STIPEND                                    | 300.    |
| NASHVILLE SYMPHONY1<br>ONE SYMPHONY PLACE<br>NASHVILLE, TN 37201 | NONE                                                                                                      | PC                             | PROFESSIONAL PERFORMANCE GRANT - VIOLIN CONCERTO  | 2,500.  |
| NYLA WATSON<br>140 E. 14TH STREET<br>NEW YORK, NY 10003          | NONE                                                                                                      | I                              | LYS SYMONETTE WARD - 2019 LOTTE LENYA COMPETITION | 3,500.  |
| NYLA WATSON<br>140 E. 14TH STREET<br>NEW YORK, NY 10003          | NONE                                                                                                      | I                              | LLC FINALS TRAVEL STIPEND                         | 750.    |
| <b>Total from continuation sheets</b>                            |                                                                                                           |                                |                                                   |         |

**Part XV** Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

| Recipient                                                                    |      | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient                               | Purpose of grant or contribution | Amount |
|------------------------------------------------------------------------------|------|-----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|----------------------------------|--------|
| Name and address (home or business)                                          |      |                                                                                                           |                                                              |                                  |        |
| PHILHARMONIA ORCHESTRA<br>6 CHANCEL STREET<br>LONDON, UNITED KINGDOM SE1 0UX | NONE | FOREIGN EQUIVALENT                                                                                        | 2019 MIDYEAR PROFESIONAL PERFORMANCE GRANT - VIOLIN CONCERTO | 10,000.                          |        |
| RACHEL SPARROW<br>1567 GROVE AVENUE<br>HIGHLAND PARK, IL 60035               | NONE | I                                                                                                         | SEMI-FINALIST PRIZE                                          | 500.                             |        |
| RACHEL SPARROW<br>1567 GROVE AVENUE<br>HIGHLAND PARK, IL 60035               | NONE | I                                                                                                         | TRAVEL STIPEND                                               | 300.                             |        |
| SAN DIEGO WINDS<br>4721 68TH STREETH<br>LA MESA, CA 91942                    | NONE | PC                                                                                                        | PROFESSIONAL PERFORMANCE GRANT - KDM, SUITE PANAMMEENNE      | 3,000.                           |        |
| SARAH BISHOP<br>137 W 137TH STREET<br>NEW YORK, NY 10030                     | NONE | I                                                                                                         | SEMI-FINALIST PRIZE                                          | 500.                             |        |
| SCOTT MCCREARY<br>23-25 35TH ST. #2<br>ASTORIA, NY 11105                     | NONE | I                                                                                                         | SEMI-FINALIST PRIZE                                          | 500.                             |        |
| SONDRINE BONTEMPS<br>554 W 148TH ST, APT 41<br>NEW YORK, NY 10031            | NONE | I                                                                                                         | EMERGING TALENT AWARD                                        | 500.                             |        |

**Part XV** Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

| Recipient<br>Name and address (home or business)                                                      | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution                  | Amount  |
|-------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|------------------------------------------------------|---------|
|                                                                                                       |                                                                                                                    |                                      |                                                      |         |
| STAGE DIRECTORS AND CHOREOGRAPHERS<br>FOUNDATION<br>321 W 44TH STREET SUITE 804<br>NEW YORK, NY 10036 | NONE                                                                                                               | I                                    | 2019 HAROLD PRINCE/KURT WEILL FELLOWSHIP - LOVE LIFE | 7,250.  |
| STAGE DIRECTORS AND CHOREOGRAPHERS<br>FOUNDATION<br>321 W 44TH STREET SUITE 804<br>NEW YORK, NY 10036 | NONE                                                                                                               | I                                    | 2019 KURT WEILL FELLOWSHIP                           | 7,250.  |
| SUN-LY PIERCE<br>1 ELLIOTT PLACE<br>CLINTON, NY 11323                                                 | NONE                                                                                                               | I                                    | SEMI-FINALIST PRIZE                                  | 500.    |
| SUN-LY PIERCE<br>1 ELLIOTT PLACE<br>CLINTON, NY 11323                                                 | NONE                                                                                                               | I                                    | TRAVEL STIPEND                                       | 300.    |
| SUZANNE LANE<br>74 V ST. NW<br>WASHINGTON, DC 20001                                                   | NONE                                                                                                               | I                                    | SEMI-FINALIST PRIZE                                  | 500.    |
| SUZANNE LANE<br>74 V ST. NW<br>WASHINGTON, DC 20001                                                   | NONE                                                                                                               | I                                    | TRAVEL STIPEND                                       | 300.    |
| THE GLIMMERGLASS FESTIVAL<br>PO BOX 191<br>COOPERSTOWN, NY 13326                                      | NONE                                                                                                               | PC                                   | KW/LL ARTIST SPONSORSHIP - JUSTIN HOPKINS            | 25,000. |

**Total from continuation sheets**

**Part XV Supplementary Information** (continued)

| 3a Grants and Contributions Paid During the Year |                                                                                             | 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  |
|--------------------------------------------------|---------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|-----------------------------------------------|---------|
| Recipient                                        | Name and address (home or business)                                                         |                                                                                                           |                                |                                               |         |
|                                                  | THE NEW SCHOOL FOR THE PERFORMING ARTS<br>79 FIFTH AVENUE, 17TH FLOOR<br>NEW YORK, NY 10003 | NONE                                                                                                      | PC                             | UNIVERSITY PERFORMANCE GRANT - STREET SCENE   | 12,000. |
|                                                  | TIMOTHY BRUNO<br>5555 HIDDEN PINES WAY<br>TOLEDO, OH 43623                                  | NONE                                                                                                      | I                              | FINALIST PRIZE - 2019 LOTTE LENYA COMPETITION | 2,000.  |
|                                                  | TIMOTHY BRUNO<br>5555 HIDDEN PINES WAY<br>TOLEDO, OH 43623                                  | NONE                                                                                                      | I                              | TRAVEL STIPEND                                | 300.    |
|                                                  | TIMOTHY BRUNO<br>5555 HIDDEN PINES WAY<br>TOLEDO, OH 43623                                  | NONE                                                                                                      | I                              | LLC FINALS TRAVEL STIPEND                     | 750.    |
|                                                  | TREVOR MARTIN<br>473 W. 141ST STREET<br>NEW YORK, NY 10031                                  | NONE                                                                                                      | I                              | 3RD PRIZE - 2019 LOTTE LENYA COMPETITION      | 10,000. |
|                                                  | TREVOR MARTIN<br>473 W. 141ST STREET<br>NEW YORK, NY 10031                                  | NONE                                                                                                      | I                              | LLC FINALS TRAVEL STIPEND                     | 750.    |
|                                                  | UNIVERSITY AT BUFFALO<br>UNIVERSITY AT BUFFALO<br>BUFFALO, NY 14214-8082                    | NONE                                                                                                      | PC                             | UNIVERSITY PERFORMANCE GRANT - TPO            | 4,000.  |
| <b>Total from continuation sheets</b>            |                                                                                             |                                                                                                           |                                |                                               |         |





THE KURT WEILL FOUNDATION FOR MUSIC  
NEW YORK, NY 10003

E.I.N.: 13-6139518  
Year Ended December 31, 2019

STATEMENT OF EXPENDITURE RESPONSIBILITY

- (a) Name and address of grantee - English Touring Opera  
Third Floor  
50 Britton Street  
London EC1M 5UP  
UNITED KINGDOM
- (b) Date and amount of grant - 25 April 2019  
\$20,000
- (c) Purpose of grant – Professional Performance of *Der Silbersee*
- (d) Amount expended by grantee - \$20,000.
- (e) Whether grantee has diverted any portion of the funds from the purpose of the grant, to the knowledge of the Foundation - No.
- (f) Dates of any reports received from the grantee – 15 December 2019
- (g) The date and results of any verification of the grantee's reports pursuant to and to the extent required by Regulation § 53.4945-5 (c) (1) -

The Kurt Weill Foundation for Music had no reason to doubt the accuracy or reliability of the reports received, therefore no independent verification is required to be undertaken.

THE KURT WEILL FOUNDATION FOR MUSIC  
NEW YORK, NY 10003

E.I.N.: 13-6139518  
Year Ended December 31, 2019

STATEMENT OF EXPENDITURE RESPONSIBILITY

- (a) Name and address of grantee - Philharmonia Orchestra  
6 Chancel Street  
London SE1 0UX  
UNITED KINGDOM
- (b) Date and amount of grant - 3 July 2020  
\$10,000
- (c) Purpose of grant – Professional Performance – Violin Concerto
- (d) Amount expended by grantee - \$10,000
- (e) Whether grantee has diverted any portion of the funds from the purpose of the grant, to the knowledge of the Foundation - No.
- (f) Dates of any reports received from the grantee – 14 October 2019
- (g) The date and results of any verification of the grantee's reports pursuant to and to the extent required by Regulation § 53.4945-5 (c) (1) – 14 October 2019

The Kurt Weill Foundation for Music had no reason to doubt the accuracy or reliability of the reports received, therefore no independent verification is required to be undertaken.

THE KURT WEILL FOUNDATION FOR MUSIC  
NEW YORK, NY 10003

E.I.N.: 13-6139518  
Year Ended December 31, 2019

STATEMENT OF EXPENDITURE RESPONSIBILITY

- (a) Name and address of grantee - London Symphony Orchestra  
Barbican Center, Silk Street  
London  
United Kingdom
- (b) Date and amount of grant - 27 June 2018  
\$15,000
- (c) Purpose of grant – Professional Performance – Symphony No. 2
- (d) Amount expended by grantee - \$15,000.
- (e) Whether grantee has diverted any portion of the funds from the purpose of the grant, to the knowledge of the Foundation - No.
- (f) Dates of any reports received from the grantee – 1 May 2019
- (g) The date and results of any verification of the grantee's reports pursuant to and to the extent required by Regulation § 53.4945-5 (c) (1) – 1 May 2019

The Kurt Weill Foundation for Music had no reason to doubt the accuracy or reliability of the reports received, therefore no independent verification is required to be undertaken.

THE KURT WEILL FOUNDATION FOR MUSIC  
NEW YORK, NY 10003

E.I.N.: 13-6139518  
Year Ended December 31, 2019

STATEMENT OF EXPENDITURE RESPONSIBILITY

- (a) Name and address of grantee - Kurt Weill Fest  
Ebertallee 63  
06840 Dessau  
GERMANY
- (b) Date and amount of grant - January 1, 2019  
\$7,000
- (c) Purpose of grant – Professional Performance (Symphony No. 2, *Trains Bound for Glory*)
- (d) Amount expended by grantee - \$7,000.
- (e) Whether grantee has diverted any portion of the funds from the purpose of the grant, to the knowledge of the Foundation - No.
- (f) Dates of any reports received from the grantee – 18 September 2019
- (g) The date and results of any verification of the grantee's reports pursuant to and to the extent required by Regulation § 53.4945-5 (c) (1) – 18 September 2019

The Kurt Weill Foundation for Music had no reason to doubt the accuracy or reliability of the reports received, therefore no independent verification is required to be undertaken.

THE KURT WEILL FOUNDATION FOR MUSIC  
NEW YORK, NY 10003

E.I.N.: 13-6139518  
Year Ended December 31, 2019

STATEMENT OF EXPENDITURE RESPONSIBILITY

- (a) Name and address of grantee - Festival d'Aix  
Palais de l'Ancien Archeveche  
13100 Aix-en-Provence  
France
- (b) Date and amount of grant - 1 January 2019  
\$45,000
- (c) Purpose of grant – Professional Performance (*Aufstieg und Fall der Stadt Mahagonny*)
- (d) Amount expended by grantee - \$45,000.
- (e) Whether grantee has diverted any portion of the funds from the purpose of the grant, to the knowledge of the Foundation - No.
- (f) Dates of any reports received from the grantee – 20 December 2019
- (g) The date and results of any verification of the grantee's reports pursuant to and to the extent required by Regulation § 53.4945-5 (c) (1) – 20 December 2019

The Kurt Weill Foundation for Music had no reason to doubt the accuracy or reliability of the reports received, therefore no independent verification is required to be undertaken.