

2949107900301 1

Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0047

2019

Department of the Treasury
Internal Revenue Service

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

1912

Open to Public Inspection

For calendar year 2019 or tax year beginning

, and ending

Name of foundation WILLIAM E. SIMON FOUNDATION INC.		A Employer identification number 13-6217788
Number and street (or P O box number if mail is not delivered to street address) 140 EAST 45TH STREET	Room/suite 14D	B Telephone number 212-661-8366
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10017		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 45,245,934.	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				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		127,540.	127,540.		
4 Dividends and interest from securities		661,965.	656,425.		
5a Gross rents				Internal Revenue Service	
b Net rental income or (loss)				Received US Bank - USB	
6a Net gain or (loss) from sale of assets not on line 10		418,534.			345
b Gross sales price for all assets on line 6a		13,116,459.			
7 Capital gain net income (from Part IV, line 2)			346,656.	NOV 30 2020	
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					Ogden, UT
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		79,025.	79,025.		Statement 1
12 Total. Add lines 1 through 11		1,287,064.	1,209,646.		
13 Compensation of officers, directors, trustees, etc		242,000.	0.		242,000.
14 Other employee salaries and wages		531,429.	0.		531,429.
15 Pension plans, employee benefits		282,959.	0.		158,520.
16a Legal fees Stmt 2		21,867.	0.		21,867.
b Accounting fees Stmt 3		17,000.	8,500.		0.
c Other professional fees Stmt 4		669,477.	262,869.		423,108.
17 Interest		30,786.	30,786.		0.
18 Taxes Stmt 5		161,921.	30,417.		750.
19 Depreciation and depletion					
20 Occupancy		286,171.	0.		309,059.
21 Travel, conferences, and meetings		49,527.	0.		48,922.
22 Printing and publications		1,635.	0.		1,635.
23 Other expenses Stmt 6		268,257.	181,838.		87,092.
24 Total operating and administrative expenses. Add lines 13 through 23		2,563,029.	514,410.		1,824,382.
25 Contributions, gifts, grants paid		6,444,189.			7,064,064.
26 Total expenses and disbursements. Add lines 24 and 25		9,007,218.	514,410.		8,888,446.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-7,720,154.			
b Net investment income (if negative, enter -0-)			695,236.		
c Adjusted net income (if negative, enter -0-)				N/A	

49 Rec. Batching system

23 2020

3/4

SCANNED APR 30 2021

17

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	2,554,600.	12,777,852.	12,777,852.
	3 Accounts receivable ▶ 2,333.			
	Less: allowance for doubtful accounts ▶	2,025.	2,333.	2,333.
	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	19,008.	42,368.	42,368.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock Stmt 7	12,746,916.	8,604,257.	8,604,257.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment: basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other Stmt 8	29,101,414.	23,664,308.	23,664,308.	
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ Statement 9)	79,816.	154,816.	154,816.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	44,503,779.	45,245,934.	45,245,934.	
Liabilities	17 Accounts payable and accrued expenses	146,837.	254,221.	
	18 Grants payable	2,196,343.	1,584,943.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ Statement 10)	8,039.	128,543.	
	23 Total liabilities (add lines 17 through 22)	2,351,219.	1,967,707.	
Net Assets or Fund Balances	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	42,152,560.	43,278,227.	
	25 Net assets with donor restrictions			
	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	42,152,560.	43,278,227.		
30 Total liabilities and net assets/fund balances	44,503,779.	45,245,934.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	42,152,560.
2 Enter amount from Part I, line 27a	2	-7,720,154.
3 Other increases not included in line 2 (itemize) ▶ CHANGE IN UNREALIZED APPRECIATION	3	8,845,821.
4 Add lines 1, 2, and 3	4	43,278,227.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	43,278,227.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES		P	Various	Various
b PARTNERSHIPS & OTHER INVESTMENTS		P	Various	Various
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))	
a 12,022,106.		9,100,850.	2,921,256.	
b 1,094,353.		3,597,075.	-2,502,722.	
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a			2,921,256.	
b			-2,502,722.	
c				
d				
e				
2 Capital gain net income or (net capital loss)		{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2 418,534.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		{		3 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 Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	8,528,086.	52,788,404.	.161552
2017	10,583,231.	56,921,566.	.185927
2016	11,587,779.	60,523,324.	.191460
2015	13,081,025.	69,308,976.	.188735
2014	13,614,066.	70,759,513.	.192399
2 Total of line 1, column (d)			2 .920073
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years			3 .184015
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 46,477,269.
5 Multiply line 4 by line 3			5 8,552,515.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 6,952.
7 Add lines 5 and 6			7 8,559,467.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.			8 8,888,446.

3

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	6,952.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0.
3	Add lines 1 and 2	3	6,952.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	6,952.
6	Credits/Payments:		
6a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	102,668.
6b	Exempt foreign organizations - tax withheld at source	6b	0.
6c	Tax paid with application for extension of time to file (Form 8868)	6c	0.
6d	Backup withholding erroneously withheld	6d	0.
7	Total credits and payments. Add lines 6a through 6d	7	102,668.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	95,716.
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax <input type="checkbox"/> 7,000. Refunded <input checked="" type="checkbox"/>	11	88,716.

Part VII-A Statements Regarding Activities

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

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

8b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV

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

2

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions See Statement 11	X	
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► www.wesimonfoundation.org	X	
14 The books are in care of ► SIMON QUICK ADVISORS, LLC Telephone no. ► 973-525-1000 Located at ► 360 MT. KEMBLE AVENUE, MORRISTOWN, NJ ZIP+4 ► 07960		
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		N/A
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here		X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____, _____, _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		X

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

5a During the year, did the foundation pay or incur any amount to:			Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	N/A		5b	
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	N/A			
If "Yes," attach the statement required by Regulations section 53.4945-5(d).	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			6b	X
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A		7b	
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 14-1				

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
SEE STATEMENT 14-2				

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

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
SIMON QUICK ADVISORS, LLC 310 SOUTH STREET, PO BOX 1913, MORRISTOWN, NJ	STAFF & OVERHEAD FEES	368,500.
SIMON QUICK ADVISORS, LLC 310 SOUTH STREET, PO BOX 1913, MORRISTOWN, NJ	ACCTG. & INVESTMENT ADVISORY FEES	144,000.

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	
	0.
2	
All other program-related investments. See instructions.	
3 N/A	
	0.
	0.
Total. Add lines 1 through 3 ▶	0.

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	37,179,916.
b	Average of monthly cash balances	1b	9,805,613.
c	Fair market value of all other assets	1c	199,516.
d	Total (add lines 1a, b, and c)	1d	47,185,045.
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	47,185,045.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	707,776.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	46,477,269.
6	Minimum investment return. Enter 5% of line 5	6	2,323,863.

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	2,323,863.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	6,952.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	6,952.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,316,911.
4	Recoveries of amounts treated as qualifying distributions	4	8,475.
5	Add lines 3 and 4	5	2,325,386.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	2,325,386.

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	8,888,446.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	8,888,446.
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	6,952.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	8,881,494.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				2,325,386.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014	10,195,014.			
b From 2015	9,733,824.			
c From 2016	8,628,569.			
d From 2017	7,833,603.			
e From 2018	5,982,528.			
f Total of lines 3a through e	42,373,538.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$	8,888,446.			
a Applied to 2018, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2019 distributable amount				2,325,386.
e Remaining amount distributed out of corpus	6,563,060.			
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:	48,936,598.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	10,195,014.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	38,741,584.			
10 Analysis of line 9:				
a Excess from 2015	9,733,824.			
b Excess from 2016	8,628,569.			
c Excess from 2017	7,833,603.			
d Excess from 2018	5,982,528.			
e Excess from 2019	6,563,060.			

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)

	Tax year				(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
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:

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

- c Any submission deadlines:

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

Part XV Supplementary Information *(continued)*

3 Grants and Contributions Paid During the Year or Approved for Future Payment					
Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year					
SEE STATEMENT 12					7,055,589.
Total				▶ 3a	7,055,589.
b Approved for future payment					
SEE STATEMENT 13					1,584,943.
Total				▶ 3b	1,584,943.

Form 990-PF	Other Income		Statement	1
Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	
MISCELLANEOUS INCOME	79,025.	79,025.		
Total to Form 990-PF, Part I, line 11	79,025.	79,025.		

Form 990-PF	Legal Fees			Statement	2
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
CRAVATH, SWAINE & MOORE LLP	21,867.	0.		21,867.	
To Fm 990-PF, Pg 1, ln 16a	21,867.	0.		21,867.	

Form 990-PF	Accounting Fees			Statement	3
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
OWEN J. FLANAGAN & COMPANY	17,000.	8,500.		0.	
To Form 990-PF, Pg 1, ln 16b	17,000.	8,500.		0.	

Form 990-PF	Other Professional Fees			Statement	4
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
ACCOUNTING & INVESTMENT ADVISORY FEES	144,000.	144,000.		0.	
STAFF & OVERHEAD FEES	368,500.	0.		368,500.	
CONSULTANT FEES	38,108.	0.		54,608.	
CUSTODY/MGMT FEES-GOLDMAN SACHS-DELAWARE	15,745.	15,745.		0.	
CUSTODY/MGMT FEES-GOLDMAN SACHS-EAGLE	42,787.	42,787.		0.	

CUSTODY/MGMT FEES-GOLDMAN SACHS-HARRIS ASSOC.	41,124.	41,124.	0.
CUSTODY/MGMT FEES-US TRUST COMPANY	19,213.	19,213.	0.
To Form 990-PF, Pg 1, ln 16c	669,477.	262,869.	423,108.

Form 990-PF	Taxes	Statement	5
-------------	-------	-----------	---

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
FEDERAL EXCISE TAXES	10,000.	0.		0.
DEFERRED FEDERAL EXCISE TAXES	120,504.	0.		0.
NEW YORK FILING FEE	750.	0.		750.
FOREIGN TAXES	30,417.	30,417.		0.
UNRELATED BUSINESS INCOME TAXES	250.	0.		0.
To Form 990-PF, Pg 1, ln 18	161,921.	30,417.		750.

Form 990-PF	Other Expenses	Statement	6
-------------	----------------	-----------	---

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
MISCELLANEOUS EXPENSE	49,038.	0.		49,958.
MEALS	12,258.	0.		12,039.
POSTAGE & DELIVERY	2,738.	0.		2,738.
PORTFOLIO DEDUCTIONS	179,471.	179,443.		0.
INSURANCE	20,192.	0.		20,192.
BANK FEES	409.	409.		0.
OTHER INVESTMENT EXPENSES	1,986.	1,986.		0.
EMPLOYEE TRAINING	2,165.	0.		2,165.
To Form 990-PF, Pg 1, ln 23	268,257.	181,838.		87,092.

Form 990-PF	Corporate Stock	Statement	7
-------------	-----------------	-----------	---

Description	Book Value	Fair Market Value
BERKSHIRE HATHAWAY - A	4,075,080.	4,075,080.
GOLDMAN SACHS - DELAWARE LCG	780,270.	780,270.
GOLDMAN SACHS - EAGLE DYNAMIC EQUITY	1,954,115.	1,954,115.
GOLDMAN SACHS - HARRIS ASSOCIATES: DYNAMIC EQUITY	1,794,792.	1,794,792.
Total to Form 990-PF, Part II, line 10b	8,604,257.	8,604,257.

Form 990-PF	Other Investments	Statement	8
-------------	-------------------	-----------	---

Description	Valuation Method	Book Value	Fair Market Value
DREYFUS STRATEGIC GLOBAL FUND	FMV	3,394,030.	3,394,030.
GS LOCAL EMERGING MKTS DEBT FD	FMV	3,041,353.	3,041,353.
VANGUARD ST CORP FUND	FMV	180,677.	180,677.
ARTISAN DYNAMIC EQUITY (GLOBAL EQUITY) LLC	FMV	2,188,978.	2,188,978.
ELLIOTT INTERNATIONAL LIMITED	FMV	1,245,258.	1,245,258.
FIA TIMBER PARTNERS, LP	FMV	24,915.	24,915.
FIA TIMBER PARTNERS II, LP	FMV	1,833,825.	1,833,825.
OCM OPPORTUNITIES FUND VI	FMV	184.	184.
SINO FINANCE GROUP, LLC	FMV	1,653,404.	1,653,404.
SOUTH STREET CAPITAL, LP	FMV	6,973,244.	6,973,244.
SOUTH STREET CAPITAL II, LLC	FMV	2,913,225.	2,913,225.
SOWOOD ALPHA FUND, LP	FMV	9,437.	9,437.
OCM OPPORTUNITIES FUND IV AIF (CAYMAN)	COST	205,778.	205,778.
Total to Form 990-PF, Part II, line 13		23,664,308.	23,664,308.

Form 990-PF	Other Assets	Statement	9
-------------	--------------	-----------	---

Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value
SECURITY DEPOSIT	61,816.	61,816.	61,816.
FEDERAL EXCISE TAX RECEIVABLE	18,000.	93,000.	93,000.
To Form 990-PF, Part II, line 15	79,816.	154,816.	154,816.

Form 990-PF	Other Liabilities	Statement	10
<u>Description</u>		BOY Amount	EOY Amount
DEFERRED FEDERAL EXCISE TAX		8,039.	128,543.
Total to Form 990-PF, Part II, line 22		8,039.	128,543.

Form 990-PF	Explanation Concerning Part VII-A, Line 12 Qualifying Distribution Statement	Statement	11
-------------	---	-----------	----

Explanation

During 2019 the Foundation made a contribution to a donor advised fund as part of its Director's Discretionary Program for Directors. This contribution was treated as a qualifying distribution. Contributions to this Fund are exclusively for charitable purposes under Section 170(c)(2)(B).

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF

Payment Date	Payee Organization	Request Project Title	Amount	Program Area
1/2/2019	Children's Aid College Prep Charter School 1919 Prospect Avenue 3rd Floor Bronx, New York 10457	Pledge - Challenge grant for support of life coaches in the 2018- 19 school year	\$20,000.00	Education
1/3/2019	Georgetown University 3307 M Street Suite 200 Washington, District of Columbia 20057	Support for the Berkley Center's Religious Freedom Research Project in 2018	-\$8,475.00	Faith
1/7/2019	Donors Trust 1800 Diagonal Street Suite 280 Alexandria, Virginia 22314	2019 Director's Designated Gift, Program Support	\$125,000.00	Others
1/7/2019	Our Lady of Good Counsel Church 155 West Parkway P.O. Box 218 Pompton Plains, New Jersey 07444	2018 Employee Matching Gift, Program Support	\$150.00	Faith
1/7/2019	Women for Women International 2000 M Street, NW Suite 200 Washington, District of Columbia 20036	2019 Director's Designated Gift, Program Support	\$10,000.00	Others
1/7/2019	Little Sisters of the Poor 140 Shepherd Lane Totowa, New Jersey 07512-2170	2018 Employee Matching Gift, Program Support	\$100.00	Faith

WILLIAM E. SIMON FOUNDATION
EIN: 13-6211778

		2019 Form 990-PF		
1/7/2019	Goucher College 1021 Dulaney Valley Road Baltimore, Maryland 21204	2018 Employee Matching Gift, Program Support	\$750.00	Education
1/7/2019	Meals-on-Wheels, Inc. 89 Maple Avenue Greenwich, Connecticut 06830	2018 Employee Matching Gift, Program Support	\$125.00	Others
1/7/2019	Boston Winter Ball c/o KMC Productions, Inc. 150 Wood Road, Suite 300 Braintree, Massachusetts 02184	2019 Director's Designated Gift, Program Support (in lieu of the 2019 Boston Winter Ball in memory of Corey Griffin)	\$15,000.00	Others
1/7/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	Pledge - Support for the 20th Anniversary of the Carol G. Simon Center Renovation	\$275,000.00	Others
1/7/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2019 Director's Designated Gift, Support for the Carol G. Simon Center Renovations	\$25,000.00	Others
1/7/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2019 Director's Designated Gift, Support for the Carol G. Simon Center Renovations	\$25,000.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
1/7/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2019 Director's Designated Gift, Support for the Carol G. Simon Center Renovations	\$25,000.00	Others
1/7/2019	Good Grief 38 Elm Street Morristown, New Jersey 07960	2019 Director's Designated Gift, Program Support	\$1,000.00	Family
1/7/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2019 Director's Designated Gift, Support for the Carol G. Simon Center Renovations	\$25,000.00	Others
1/7/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2019 Director's Designated Gift, Support for Carol G. Simon Center Renovations	\$25,000.00	Others
1/7/2019	Peck School 247 South Street Morristown, New Jersey 07960	2019 Director's Designated Gift, Program Support	\$25,000.00	Education
1/14/2019	Red Oaks School 21 Cutler Street Morristown, New Jersey 07960	2019 Director's Designated Gift, "Phantom" Capital Campaign	\$25,000.00	Education
1/14/2019	Ocean Conservancy 1300 19th Street, NW 8th Floor Washington, District of Columbia 20036	2019 Staff Designated Gift, Program Support	\$500.00	Others
1/14/2019	Endangered Wolf Center PO Box 760 Eureka, Missouri 63025	2019 Staff Designated Gift, Program Support	\$500.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
1/14/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2019 Director's Designated Gift, Support for Carol G. Simon Center Renovations	\$25,000.00	Others
1/14/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2019 Director's Designated Gift, Support for Carol G. Simon Center Renovations	\$25,000.00	Others
1/14/2019	Morris Arts 14 Maple Avenue, Suite 301 Morristown, New Jersey 07960	Pledge - Challenge grant for support of the "Girls Surviving" mentoring program in the 2018-19 school year	\$3,500.00	Family
1/14/2019	Nature Conservancy 4225 North Fairfax Drive, Suite 100 Arlington, Virginia 22203	2019 Staff Designated Gift, Program Support	\$500.00	Others
1/14/2019	SpeakUp 528 E. Lancaster Avenue Suite 50 St. Davids, Pennsylvania 19087	2018 Director's Designated Gift, Program Support	\$2,500.00	Others
1/14/2019	Court Appointed Special Advocates of Morris and Sussex Counties, Inc. 18 Cattano Avenue Morristown, New Jersey 07963-0264	Pledge - Challenge grant for program support for clients in Morristown	\$10,000.00	Family

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
1/14/2019	Building One Community 75 Selleck Street Stamford, Connecticut 06905	2018 Employee Matching Gift, Program Support	\$150.00	Family
1/14/2019	Wake Forest University 1834 Wake Forest Road Winston-Salem, North Carolina 27106	2019 Director's Designated Gift, Magnolia Scholars Program	\$25,000.00	Education
1/14/2019	Spring Street Community Development Corp 65 Spring St. Morristown, New Jersey 07960	Pledge - Challenge grant for program support	\$4,000.00	Family
1/14/2019	Blair Academy 2 Park Street P.O. Box 600 Blairstown, New Jersey 07825	2018 Director's Designated Gift, Senior Class Scholarship Challenge Grant	\$25,000.00	Education
1/14/2019	Richard Nixon Foundation 18001 Yorba Linda Boulevard Yorba Linda, California 92886	Pledge - Centennial Legacy Campaign	\$250,000.00	Others
1/14/2019	Church of Christ the King P.O. Box 368 Blue Mill Road New Vernon, New Jersey 07976	2018 Employee Matching Gift, Program Support	\$2,400.00	Faith
1/14/2019	Church of the Holy Spirit 318 Newark- Pompton Turnpike Pequannock, New Jersey 07440	2019 Employee Matching Gift, Program Support	\$75.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
1/14/2019	Part of the Solution 2759 Webster Avenue Bronx, New York 10458-3708	Program Support	\$5,000.00	Others
1/22/2019	Boys and Girls Clubs of Hudson County 225 Morris Blvd. Jersey City, New Jersey 07302	Pledge - Challenge grant to support Healthy Habits: Triple Play program in the 2017-18 school year	\$20,000.00	Family
1/22/2019	Big Brothers Big Sisters of Northern New Jersey 333 Rt. 46 West, Suite 205 Mountain Lakes, New Jersey 07046	Pledge - Challenge grant for support for site-based mentoring in Morristown in the 2018-19 school year	\$20,000.00	Family
1/22/2019	Friends of the Children New York P.O. Box 1649 New York, New York 10026	Pledge - Challenge grant to support programs in the South Bronx in the 2018-19 school year	\$10,000.00	Family
1/22/2019	Ramapo for Children 49 West 38th Street 5th Floor New York, New York 10018	Pledge - Challenge grant for workshops in Jersey City for parents and educators of special needs children in the 2018-19 school year	\$2,500.00	Family
1/22/2019	Ramapo for Children 49 West 38th Street 5th Floor New York, New York 10018	Pledge - Challenge grant for workshops in the South Bronx for parents and educators of special needs children in the 2018-19 school year	\$2,500.00	Family

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
1/22/2019	UCLA Health Sound Body Sound Mind 1001 Gayley Ave. 2nd Floor, Suite #20 Los Angeles, California 90024	Pledge - Program Support for 2018, 2019, and 2020	\$55,000.00	Others
1/28/2019	Saint Joseph Church 216 Comly Road Lincoln Park, New Jersey 07035	2018 Employee Matching Gift, Program Support	\$100.00	Faith
1/28/2019	Success Academy Charter Schools 95 Pine Street, 6th Floor New York, New York 10005	Pledge - Challenge Grant for support of the South Bronx schools in the 2018-19 school year	\$100,000.00	Education
1/28/2019	Saint John Church 1986 Post Road Darien, Connecticut 06820	2018 Employee Matching Gift, Program Support	\$287.50	Faith
1/28/2019	Rocking the Boat 812 Edgewater Road Bronx, New York 10474	Pledge - Challenge grant for Job Skills Program	\$15,000.00	Family
1/28/2019	EWTN 5817 Old Leeds Road Irondale, Alabama 35210	Employee Matching Gift, Program Support	\$80.00	Faith
1/28/2019	Purnell School 51 Pottersville Road P.O. Box 500 Pottersville, New Jersey 07979	2019 Director's Designated Gift, Annual Fund	\$10,000.00	Education
1/28/2019	Episcopal High School 1200 North Quaker Lane Alexandria, Virginia 22302	2019 Director's Designated Gift, Annual Fund	\$2,500.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
2/4/2019	Red Oaks School 21 Cutler Street Morristown, New Jersey 07960	2019 Director's Designated Gift, Annual Fund	\$25,000.00	Education
2/4/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	Pledge - Support for Project Independence in 2019	\$175,000.00	Others
2/4/2019	Harwich Conservation Trust PO Box 101 South Harwich, Massachusetts 02661	2019 Director's Designated Gift, Ongoing Program Support	\$20,000.00	Others
2/4/2019	Prison Fellowship 44180 Riverside Parkway Lansdowne, Virginia 20176	Support for Rikers Island prisoner programs	\$5,000.00	Faith
2/4/2019	World Vision, Inc. P.O. Box 9716 Federal Way, Washington 98063	2018 Employee Matching Gift, Program Support	\$570.00	Others
2/13/2019	New City Kids 936 Alpine Ave, NW Grand Rapids, Michigan 49504	Pledge - Challenge Grant for capital project	\$113,563.00	Faith
2/13/2019	Saint Mary Abbey 230 Mendham Road Morristown, New Jersey 07960	Support for the capital campaign for renovations of the buildings for elderly monks	\$25,000.00	Faith
2/13/2019	Philanthropy Roundtable 1120 20th Street NW Suite 550 South Washington, District of Columbia 20036	Pledge - William E. Simon Prize for Philanthropic Leadership in 2018 and 2019	\$270,000.00	WES Prizes\Philanthr opic Leadership

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
2/13/2019	Pohatcong Township PTA 240 Route 519 Phillipsburg, New Jersey 08865	2019 Staff Designated Gift, Program Support	\$1,000.00	Education
2/19/2019	SevenOneSeven 127 Washington Avenue Chatham, New Jersey 07928	2019 Director's Designated Gift, Program Support	\$1,000.00	Others
2/19/2019	Saint Mary Abbey 230 Mendham Road Morristown, New Jersey 07960	2019 Director's Designated Gift, Support for the Building for Tomorrow campaign	\$24,950.00	Faith
2/19/2019	Saint Mary Abbey 230 Mendham Road Morristown, New Jersey 07960	2018 Director's Designated Gift, Support for the Building for Tomorrow campaign	\$50.00	Faith
2/19/2019	Covenant House New Jersey 330 Washington Street Newark, New Jersey 07102	Pledge - Challenge grant for program support in Jersey City in 2018	\$62,500.00	Family
2/19/2019	Great Swamp Watershed Association P.O. Box 300 New Vernon, New Jersey 07976	Program Support	\$500.00	Others
2/19/2019	Classroom, Inc. 123 William Street 12th Floor New York, New York 10038	Program Support	\$5,000.00	Education\Academic Enhancement
2/19/2019	Community Foundation of New Jersey P.O. Box 338 35 Knox Hill Road Morristown, New Jersey 07963-0317	Support for the Morristown Festival of Books	\$3,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
2/25/2019	Institute for Justice 901 N. Glebe Road Suite 900 Arlington, Virginia 22203	Support for litigation work on school choice issues	\$15,000.00	Education
2/25/2019	Good Counsel 411 Clinton Street P.O. Box 6068 Hoboken, New Jersey 07030-2780	Pledge - Challenge grant for support of the South Bronx home	\$2,500.00	Family
2/25/2019	Student Partner Alliance 561 Springfield Avenue Summit, New Jersey 07901	Support for scholarships and mentoring for high school students in Jersey City in the 2019-20 school year (outright)	\$7,500.00	Education\Schol arship / Tuition Asst.
2/25/2019	Boys and Girls Clubs of Newark 1 Avon Avenue Newark, New Jersey 07108	Program Support (in lieu of the Evening of the Stars on April 11, 2019)	\$500.00	Family
2/25/2019	South Bronx United 192 E. 151st Street 5th Floor Bronx, New York 10451	Program Support (outright)	\$10,000.00	Family
2/25/2019	Moving Picture Institute Tribeca Film Center 375 Greenwich Street New York, New York 10013	Support for the Miss Virginia movie about school choice	\$10,000.00	Education
2/25/2019	Interfaith Food Pantry 2 Executive Drive Morris Plains, New Jersey 07950	Pledge - Challenge grant for program support	\$5,000.00	Others

6

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
2/25/2019	Saint Joseph School 509 Pavonia Avenue Jersey City, New Jersey 07306	Support for the Accelerated Academic Program in Spring 2019 and Fall 2019	\$22,500.00	Education
2/25/2019	Saint Nicholas School 118 Ferry Street Jersey City, New Jersey 07307	Support for a teacher professional development program in Instructional Coherence and Data Analysis & Action Planning in Spring 2019	\$15,000.00	Education
2/25/2019	Seeing Eye P.O. Box 375 Morristown, New Jersey 07963-0375	Program Support	\$5,000.00	Others
2/25/2019	Saint Peter's University Hospital Child Life Program 254 Easton Avenue Brunswick, New Jersey 08901	2019 Staff Designated Gift, Child Life Program	\$1,500.00	Others
2/25/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2019 Director's Designated Gift, Women's Health Philanthropy Council	\$10,000.00	Others
2/25/2019	New Jersey SEEDS 494 Broad Street, Suite 105 Newark, New Jersey 07102	Support for Jersey City students in the 2018-19 school year	\$15,000.00	Education\Schol arship / Tuition Asst.
2/25/2019	Archdiocese of Los Angeles 3424 Wilshire Boulevard Los Angeles, California 90010	Program Support (in lieu of the Cardinal's Awards Dinner on March 16, 2019, honoring Bill Simon, Jr.)	\$5,000.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
2/25/2019	Jersey City Firefighters Italian American Society 16 Matawan Green Lane Matawan, New Jersey 07748	2019 Staff Designated Gift, Program Support	\$1,500.00	Others
3/4/2019	Yogi Berra Museum and Learning Center 8 Yogi Berra Drive Little Falls, New Jersey 07424	2019 Director's Designated Gift, Program Support (in lieu of the 3rd Annual Yogi Berra Museum Awards Dinner on April 11, 2019)	\$1,000.00	Others
3/4/2019	Saint Ignatius School 740 Manida Street Bronx, New York 10474	Pledge - Challenge grant for program support in the 2018-19 school year	\$15,000.00	Education\Acad emic Enhancement
3/4/2019	Ronald Reagan Presidential Foundation 1455 Pennsylvania Ave., NW Suite 850 Washington, District of Columbia 20004	Program Support	\$2,500.00	Education
3/4/2019	Foundation for Cultural Review, Inc. 900 Broadway New York, New York 10003	Program Support (in lieu of the 7th Annual Edmund Burke Award for Service to Culture and Society Dinner on April 4, 2019)	\$2,500.00	Education
3/4/2019	World Vision, Inc. P.O. Box 9716 Federal Way, Washington 98063	2018 Employee Matching Gift, Program Support	\$454.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
3/4/2019	Thomas B. Fordham Institute 1016 16th Street, NW 8th Floor Washington, District of Columbia 20036	Support for a study of charter market share and student growth	\$20,000.00	Education
3/4/2019	Freedom Institute 515 Madison Avenue New York, New York 10022	2019 Director's Designated Gift, Program Support	\$2,500.00	Others
3/4/2019	Freedom Institute 515 Madison Avenue New York, New York 10022	2019 Director's Designated Gift, Program Support	\$2,500.00	Others
3/4/2019	Freedom Institute 515 Madison Avenue New York, New York 10022	2019 Director's Designated Gift, Program Support	\$2,500.00	Others
3/4/2019	Freedom Institute 515 Madison Avenue New York, New York 10022	2019 Director's Designated Gift, Program Support	\$2,500.00	Others
3/4/2019	Freedom Institute 515 Madison Avenue New York, New York 10022	2019 Director's Designated Gift, Program Support	\$2,500.00	Others
3/4/2019	Freedom Institute 515 Madison Avenue New York, New York 10022	2019 Director's Designated Gift, Program Support	\$2,500.00	Others
3/11/2019	Assumption College for Sisters 200 A Morris Avenue Denville, New Jersey 07834	Program Support (in lieu of the Caring Basket Gala on April 4, 2019)	\$500.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
3/11/2019	Classical Charter Schools 977 Fox Street Bronx, New York 10459	Pledge - Challenge grant to support the 2018 Summer Learning Program, including the Kindergarten Preparatory Program	\$15,000.00	Education
3/11/2019	OLC School 248 Luis Marin Blvd Jersey City, New Jersey 07302	Support for math coaching and enrichment program in Summer 2019 and the 2019-20 school year	\$12,500.00	Education
3/11/2019	Kent Place School 42 Norwood Avenue Summit, New Jersey 07902-0308	2019 Director's Designated Gift, Program Support	\$1,000.00	Education
3/11/2019	50CAN 1625 K Street NW Suite 400 Washington, District of Columbia 20006	Program Support for NYCAN (outright)	\$15,000.00	Education
3/11/2019	Epiphany School Foundation 234 East 22nd Street New York, New York 10010	2019 Employee Matching Gift, Program Support	\$50.00	Education
3/11/2019	Epiphany School Foundation 234 East 22nd Street New York, New York 10010	2019 Staff Designated Gift, Program Support	\$1,000.00	Education
3/11/2019	FIRST 200 Bedford Street Manchester, New Hampshire 03101-1132	2019 Staff Designated Gift, Team #3654 - Tech Tigers	\$1,000.00	Education
3/18/2019	CREATE 73 Lenox Avenue New York, New York 10026	2019 Staff Designated Gift, Program Support	\$1,000.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

3/18/2019	Bridge the Gap College Prep P.O. Box 1390 Sausalito, California 94565	2019 Form 990-PF 2019 Director Designated Gift, Fund a Future	\$5,000.00	Education
3/18/2019	Family Life Academy Charter School 296 East 140th Street Bronx, New York 10454	Pledge - Challenge grant for Wellness Program in the 2018-19 school year	\$10,000.00	Family
3/18/2019	South Bronx Educational Foundation Inc. 843 Crotona Park North Bronx, New York 10460	Pledge - Challenge grant for program support	\$10,000.00	Family
3/25/2019	Beat the Streets Los Angeles 515 S. Figueroa Street 16th Floor Los Angeles, California 90071	2018 Director's Designated Gift, Program Support	\$3,000.00	Family
4/1/2019	AES Crestwood Foundation 465 Westchester Avenue Crestwood, New York 10707	2019 Employee Matching Gift, Program Support	\$25.00	Education
4/1/2019	Summer Search 90 Broad Street Suite 701 New York, New York 10004	Pledge - Challenge grant to support South Bronx programs in the 2018-19 school year	\$10,000.00	Family
4/1/2019	Tudor City Greens 5 Tudor City Place Box #1-E New York, New York 10017	2018 Employee Matching Gift, Program Support	\$50.00	Others
4/15/2019	Saint Peter's Episcopal Church 70 Maple Avenue Morristown, New Jersey 07960	2019 Director's Designated Gift, Program Support	\$10,000.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
4/15/2019	Police Athletic League Inc. 34 1/2 East 12th Street New York, New York 10003	Program Support	\$500.00	Others
4/15/2019	ALFRE Inc. 56 Mt. Kemble Avenue Morristown, New Jersey 07960-5152	2019 Director's Designated Gift, Mrs. Wilson's House	\$2,500.00	Others
4/15/2019	Mayo Performing Arts Center 100 South Street Morristown, New Jersey 07960	Program Support for the Paterson After-School Arts Enrichment Program	\$1,000.00	Education
4/15/2019	Tri-County Scholarship Fund 14 West Main Street Mendham, New Jersey 07945	Pledge - Challenge grant for scholarship support for students in Morris County in the 2017-18 and 2018-19 school years	\$10,000.00	Education
4/15/2019	Columbia University 2950 Broadway New York, New York 10027	Support for Gray Matters at Columbia University Department of Psychiatry (in lieu of the 12th Annual Gray Matters at Columbia Annual Benefit Luncheon on April 30, 2019)	\$1,000.00	Others
4/15/2019	Saint Peter's University 2641 Kennedy Blvd. Jersey City, New Jersey 07306	Saint Aedan's Church participation in a Parish Catalyst cohort	\$25,000.00	Faith
4/15/2019	Foundation for Women Warriors 5062 Lankershim Blvd., #3013 North Hollywood, California 91601	2019 Staff Designated Gift, Program Support	\$500.00	Others
4/15/2019	Northwell Health Foundation 210 East 64th Street New York, New York 10065	Support for a Brainlab Navigation System at Manhattan Eye, Ear and Throat Hospital	\$25,000.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
4/15/2019	National Kidney Foundation 30 E. 33rd Street New York, New York 10016	2019 Employee Matching Gift, 2019 St. Louis Kidney Walk (in support of Anne Allred - 5 On Your Side)	\$50.00	Others
4/15/2019	Paper Mill Playhouse 22 Brookside Drive Millburn, New Jersey 07041	Program Support (in lieu of the Annual Gala on May 10, 2019)	\$500.00	Others
4/15/2019	Nature Conservancy 4225 North Fairfax Drive, Suite 100 Arlington, Virginia 22203	2019 Director's Designated Gift, Program Support for Nature Conservancy in East Hampton	\$5,000.00	Others
4/22/2019	Blair Academy 2 Park Street P.O. Box 600 Blairstown, New Jersey 07825	2019 Director's Designated Gift, Senior Class Scholarship Challenge Grant	\$25,000.00	Education
4/22/2019	Summer Search 90 Broad Street Suite 701 New York, New York 10004	2019 Director's Designated Gift, "Fund-A-Need"	\$5,000.00	Family
4/22/2019	USTA Foundation 70 W. Red Oak Lane White Plains, New York 10604	2019 Director's Designated Gift, Program Support	\$10,000.00	Others
4/22/2019	Wake Forest University 1834 Wake Forest Road Winston-Salem, North Carolina 27106	2019 Director's Designated Gift, Parents' Council	\$2,500.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
4/22/2019	University of Virginia Office of Sponsored Programs P.O. Box 400195 Charlottesville, Virginia 22904-4195	Support for the National Marriage Project	\$35,000.00	Family
4/29/2019	National Alliance for Public Charter Schools 1425 K Street, NW Suite 900 Washington, District of Columbia 20005	Program Support (outright)	\$20,000.00	Education
4/29/2019	Squash and Education Alliance 555 Eighth Avenue Suite 1102 New York, New York 10018	Pledge - Program Support in the 2018-19 and 2019-20 school years	\$25,000.00	Family
4/29/2019	Soaring Heights Charter School 1 Romar Avenue Jersey City, New Jersey 07305	Pledge - Challenge grant to support math intervention program and academic enrichment programs in the 2018-19 school year	\$15,000.00	Education
4/29/2019	Stanford Law School Crown Quadrangle 559 Nathan Abbott Way Stanford, California 94305	Program support for the Religious Liberty Clinic	\$35,000.00	Faith
4/29/2019	Parish Catalyst 11100 Santa Monica Blvd Suite 1910 Los Angeles, California 90025	Pledge - Program Support in 2018 and 2019	\$250,000.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
4/29/2019	Drexel Fund 606 E. Juneau Ave, #510635 Milwaukee, Wisconsin 53203	Program Support	\$15,000.00	Education
4/29/2019	Little Sisters of the Poor 140 Shepherd Lane Totowa, New Jersey 07512-2170	2019 Employee Matching Gift, Program Support	\$100.00	Faith
4/29/2019	Saint Mary Abbey 230 Mendham Road Morristown, New Jersey 07960	Program Support (in lieu of the Abbot's Table Event on May 15, 2019)	\$1,000.00	Faith
4/29/2019	Good Counsel 411 Clinton Street P.O. Box 6068 Hoboken, New Jersey 07030-2780	Support for the South Bronx home (outright)	\$7,500.00	Family
4/29/2019	Hudson Catholic Regional High School 790 Bergen Avenue Jersey City, New Jersey 07306	Support for the Dual Enrollment Program in the 2018-19 school year	\$15,000.00	Education\Acad emic Enhancement
5/8/2019	Our Lady of Good Counsel Church 155 West Parkway P.O. Box 218 Pompton Plains, New Jersey 07444	2019 Employee Matching Gift, Program Support	\$425.00	Faith
5/8/2019	Church of the Holy Spirit 318 Newark- Pompton Turnpike Pequannock, New Jersey 07440	2019 Employee Matching Gift, Program Support	\$100.00	Faith

WILLIAM E. SIMON FOUNDATION
EIN: 13-6211778

2019 Form 990-PF				
5/8/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2019 Employee Matching Gift, Program Support	\$2,500.00	Others
5/8/2019	Acton Institute for the Study of Religion and Liberty 98 Fulton Street E Grand Rapids, Michigan 49503	City FAVS Conference in 2019	\$45,000.00	Faith
5/8/2019	Harvard University John F. Kennedy School of Government 79 JF Kennedy Street, Taubman 304 Cambridge, Massachusetts 02138	Pledge - Support for the journal Education Next	\$30,000.00	Education
5/8/2019	Future Five 135 Atlantic Street Stamford, Connecticut 06901	Pledge - Challenge grant for Program Support	\$10,000.00	Family
5/8/2019	New York Special Olympics 504 Balltown Road Schenectady, New York 12304-2209	2019 Staff Designated Gift, Support for the Genesee Region Special Olympics	\$500.00	Others
5/13/2019	Saint Pius X Church 24 Changebridge Road Montville, New Jersey 07045	2019 Employee Matching Gift, Program Support	\$50.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
5/13/2019	Editorial Projects in Education 6935 Arlington Road Suite 100 Bethesda, Maryland 20814	Support for "Education Week," as a token of our support of their education reform coverage	\$5,000.00	Education
5/13/2019	Heritage Foundation 214 Massachusetts Avenue, N.E. Washington, District of Columbia 20002-4999	Support for Ryan Anderson as the William E. Simon Fellow in 2019	\$50,000.00	Faith
5/13/2019	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	Support for Jersey City pregnancy center (outright)	\$15,000.00	Family
5/13/2019	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	Support for Morristown pregnancy center (outright)	\$15,000.00	Family
5/13/2019	Hunts Point Alliance for Children P.O. Box 740190 Bronx, New York 10474	Pledge - Challenge grant for program support in the 2018-19 school year	\$35,000.00	Family
5/16/2019	Big Brothers Big Sisters of Essex, Hudson, and Union Counties 500 Broad St., 2nd Floor Newark, New Jersey 07102	Mentoring programs for youth in Jersey City (outright)	\$75,000.00	Family

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
5/16/2019	Seton Education Partners 7765 Orien Avenue La Mesa, California 91941	El Camino afterschool program manual project (outright)	\$50,000.00	Faith
5/16/2019	Trinitas Health Foundation P.O. Box 259 Elizabeth, New Jersey 07207	2019 Director's Designated Gift, Peace of Mind Campaign	\$10,000.00	Others
5/16/2019	Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, New York 10017	Support for Kay Hymowitz as the William E. Simon Fellow in 2019	\$75,000.00	Family
5/16/2019	Summer Search 90 Broad Street Suite 701 New York, New York 10004	Support for South Bronx programs in the 2019-20 school year (outright)	\$25,000.00	Family
5/16/2019	House of Good Hope PO BOX 4042 Hartford, Connecticut 06147	2019 Staff Designated Gift, Program Support	\$500.00	Faith
5/16/2019	National Council for Adoption 225 North Washington Street Alexandria, Virginia 22314-2520	Pledge - Challenge Grant for Program Support	\$10,000.00	Family
5/28/2019	Newark Academy 91 South Orange Avenue Livingston, New Jersey 07039	2019 Director's Designated Gift, Program Support	\$20,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF

5/28/2019	Ethics and Public Policy Center 1730 M Street, NW Suite 910 Washington, District of Columbia 20036	Support for the William E. Simon Chair in Catholic Studies and Simon Lecture	\$200,000.00	Faith
5/28/2019	Big Brothers Big Sisters of New York City 40 Rector Street 11th Floor New York, New York 10006	Pledge - Challenge grant for program support for the South Bronx	\$10,000.00	Family
5/28/2019	American Federation for Children Growth Fund 1020 19th Street, NW Suite 675 Washington, District of Columbia 20036	Program Support (outright)	\$50,000.00	Education
5/28/2019	Massachusetts Audubon Society 208 South Great Road Lincoln, Massachusetts 01773	2019 Director's Designated Gift, Program Support	\$25,000.00	Others
5/28/2019	Roots and Wings Foundation 75 Bloomfield Avenue Suite 303 Denville, New Jersey 07834	Program Support for Morris County	\$13,000.00	Family
5/28/2019	Roots and Wings Foundation 75 Bloomfield Avenue Suite 303 Denville, New Jersey 07834	Program support for pilot site in Jersey City (outright)	\$25,000.00	Family

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
5/28/2019	Cape Cod Symphony Orchestra 1060 Falmouth Road, Suite A Hyannis, Massachusetts 02601	2019 Director's Designated Gift, Program Support	\$30,000.00	Others
5/28/2019	Frost Valley YMCA 2000 Frost Valley Road Claryville, New York 12725	2019 Director's Designated Gift, Program Support	\$15,000.00	Family
5/28/2019	Random Acts of Flowers 3500 Workman Road #101A Knoxville, Tennessee 37921	2019 Director's Designated Gift, Program Support	\$20,000.00	Others
5/28/2019	Fibrolamellar Cancer Foundation 20 Horseneck Lane, 2nd Floor Greenwich, Connecticut 06830	2019 Director's Designated Gift, Program Support	\$5,000.00	Others
6/3/2019	Saint Christopher's Episcopal Church 625 Main Street Chatham, Massachusetts 02633	2019 Director's Designated Gift, Chatham Food Pantry	\$15,000.00	Others
6/3/2019	Dominican Foundation 141 E. 65th Street New York, New York 10065	2019 Staff Designated Gift, Father John McGuire Memorial Scholarship Fund and Friars for Life	\$1,000.00	Faith
6/3/2019	Boys and Girls Clubs of Hudson County 225 Morris Blvd. Jersey City, New Jersey 07302	Support for the Healthy Habits: Triple Play Program in the 2018-19 school year (outright)	\$25,000.00	Family

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
6/3/2019	Sussex Tech Mustang Football Club Sussex County Technical High School 105 North Church Road Sparta, New Jersey 07871	Program Support	\$500.00	Others
6/10/2019	New England College 7 Main Street Henniker, New Hampshire 03242- 3293	2019 Director's Designated Gift, Opportunity Fund	\$10,000.00	Education
6/10/2019	National Pancreas Foundation 3 Bethesda Metro Center Suite 700 Bethesda, Maryland 20814	Program Support (in lieu of the "Courage for a Cure" Gala on September 13, 2019)	\$1,000.00	Others
6/10/2019	New City Kids 936 Alpine Ave, NW Grand Rapids, Michigan 49504	Pledge - Challenge Grant for General Operating Support for Jersey City in 2019	\$85,000.00	Family
6/10/2019	Saint Peter's Episcopal Church 70 Maple Avenue Morristown, New Jersey 07960	Support for bilingual summer camp in 2019 (outright)	\$10,000.00	Faith
6/10/2019	Madison Area YMCA 111 Kings Road Madison, New Jersey 07940	2019 Director's Designated Gift, Family Center Expansion Campaign	\$5,000.00	Family
6/10/2019	Random Acts of Flowers 3500 Workman Road #101A Knoxville, Tennessee 37921	Support for Chicago branch which provides flowers to sick patients	\$5,000.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
6/10/2019	JBWS P.O. Box 1437 Morristown, New Jersey 07962	Program Support (in lieu of the 20th Annual Hope Classic on July 15, 2019)	\$500.00	Family
6/10/2019	Catholic Schools Foundation 67 Batterymarch Street 6th Floor Boston, Massachusetts 02110	Support for partial scholarships in the 2018-19 year	\$10,000.00	Education\Schol arship / Tuition Asst.
6/17/2019	Vroom Street Church 155 Vroom Street Jersey City, New Jersey 07306	2019 July Jamboree Summer Program	\$35,000.00	Faith
6/17/2019	Vassar College 124 Raymond Avenue Poughkeepsie, New York 12604	2019 Director's Designated Gift, Brewers Fund	\$10,000.00	Education
6/17/2019	Corpus Christi Parish 880 Toyopa Drive Pacific Palisades, California 90272	2019 Director's Designated Gift, Program Support	\$7,000.00	Faith
6/17/2019	Sophia Institute for Teachers P.O. Box 5284 Manchester, New Hampshire 03108	Support for a catechetical teacher training workshop in the Bronx in Fall 2019	\$7,000.00	Faith
6/17/2019	Saint Dominic Academy 2572 Kennedy Blvd. Jersey City, New Jersey 07304	Pledge - Challenge grant for the replacement of windows in Siena Hall	\$25,000.00	Education
6/17/2019	nourish.NJ 36 Sussex Avenue Morristown, New Jersey 07960	Support for the Breakfast Program (outright)	\$5,000.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
6/17/2019	Shakespeare Theatre of New Jersey, Inc. 36 Madison Avenue Madison, New Jersey 07940	Support for Shakespeare Educational Programs	\$500.00	Others
6/24/2019	Homeless Solutions, Inc. 3 Wing Drive, Suite 245 Cedar Knolls, New Jersey 07927	Program Support (outright)	\$10,000.00	Others
6/24/2019	National Review Institute 19 W. 44th Street Suite 1701 New York, New York 10036	Support for the Center for Religion, Culture & Civil Society	\$7,500.00	Faith
6/24/2019	Covenant House New Jersey 330 Washington Street Newark, New Jersey 07102	2019 Staff Designated Gift, Program Support	\$1,000.00	Family
6/24/2019	Villanova University Development Office 800 Lancaster Avenue Villanova, Pennsylvania 19085-1673	2019 Staff Designated Gift, Program Support	\$2,500.00	Education
6/24/2019	P.G. Chambers School 15 Halko Drive Cedar Knolls, New Jersey 07927	Program Support	\$1,000.00	Education
6/24/2019	Saint Labre Indian School P.O. Box 216 Ashland, Montana 59003	2019 Employee Matching Gift, Program Support	\$35.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
7/1/2019	Brilla College Preparatory Charter Schools 413 E. 144th Street Bronx, New York 10454	Pledge - Coaching for teachers in special education practices in the 2019-20 school year	\$50,000.00	Education\Acad emic Enhancement
7/1/2019	Golden Door Charter School 3040 Kennedy Blvd. Jersey City, New Jersey 07302	Pledge - Support for Interactive Learning Initiative through Chromebook purchases	\$50,000.00	Education
7/1/2019	Catholic Education Partners c/o Frassati Catholic Academy 3951 Cottonwood Lakes Blvd. Thornton, Colorado 80241	Program Support (outright)	\$40,000.00	Education
7/1/2019	Elon University Johnston Hall 213 2300 Campus Box Elon, North Carolina 27244	2019 Director's Designated Gift, Odyssey Scholars Program	\$16,667.00	Education
7/1/2019	Soaring Heights Charter School 1 Romar Avenue Jersey City, New Jersey 07305	Pledge - Support for enrichment, computers, professional development, and STEM enhancement projects in the 2019- 20 school year (outright)	\$60,000.00	Education
7/1/2019	Saint Ignatius School 740 Manida Street Bronx, New York 10474	Support for the Graduate Support Program in the 2019-20 school year (outright)	\$25,000.00	Education
7/1/2019	Classical Charter Schools 977 Fox Street Bronx, New York 10459	Pledge - Support for the 2019 Summer Learning Academy (outright)	\$25,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
7/1/2019	Interfaith Food Pantry 2 Executive Drive Morris Plains, New Jersey 07950	Program Support (outright)	\$6,250.00	Others
7/1/2019	Cristo Rey Newark 239 Woodside Avenue Newark, New Jersey 07104-3113	Pledge - Support for the Corporate Work Study Program in the 2019- 20 school year	\$7,500.00	Education
7/1/2019	Success Academy Charter Schools 95 Pine Street, 6th Floor New York, New York 10005	Pledge - Program Support for the South Bronx Schools in the 2019- 20 school year (outright)	\$100,000.00	Education
7/1/2019	Cardinal Hayes High School 650 Grand Concourse Bronx, New York 10451	Pledge - to support Period 9 program for students in need of instructional support in the 2019- 20 school year	\$25,000.00	Education\Acad emic Enhancement
7/1/2019	Mercy Center 377 East 145th Street Bronx, New York 10454	Pledge - Challenge grant for Program Support	\$20,000.00	Family
7/1/2019	Tri-County Scholarship Fund 14 West Main Street Mendham, New Jersey 07945	Pledge - Scholarship support for students in Morris County in the 2019-20 and 2020-21 school years (outright)	\$25,000.00	Education
7/1/2019	Assumption College for Sisters 200 A Morris Avenue Denville, New Jersey 07834	Pledge - Scholarship support for one sister in the 2018-19, 2019-20 and 2020-21 school years	\$10,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
7/1/2019	Bronx Charter School for the Arts 1440 Story Avenue Bronx, New York 10473	Pledge - Support for coaching and professional development for new math curriculum in the 2019-20 school year	\$20,000.00	Education
7/1/2019	Girls Educational and Mentoring Services, Inc. 201 West 148th Street, Ground Fl. New York, New York 10039	Program Support for South Bronx (outright)	\$7,500.00	Family
7/1/2019	Children's Scholarship Fund 8 West 38th Street, 9th Floor New York, New York 10018-6229	Pledge - Support for scholarships for students in the South Bronx in the 2019-20 school year (outright)	\$250,000.00	Education\Scholarship / Tuition Asst.
7/1/2019	Preschool Advantage 25 Lindsley Drive Suite 307 Morristown, New Jersey 07960	Pledge - Program Support in the 2019-20 school year	\$8,000.00	Education
7/8/2019	New Jersey Special Olympics P.O. Box 3589 Princeton, New Jersey 08543	2019 Employee Matching Gift, Program Support	\$25.00	Others
7/8/2019	Good Grief 38 Elm Street Morristown, New Jersey 07960	Pledge - Challenge grant for support in Morristown	\$30,000.00	Family
7/15/2019	Random Acts of Flowers 3500 Workman Road #101A Knoxville, Tennessee 37921	2019 Director's Designated Gift, Program Support	\$5,000.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
7/15/2019	Morristown-Beard School 70 Whippany Road Morristown, New Jersey 07960	2019 Director's Designated Gift, Annual Fund	\$5,000.00	Education
7/15/2019	Zeta Charter Schools 222 Alexandra Avenue Bronx, New York 10454	Program Support for Bronx 1 School in the 2018-19 school year	\$10,000.00	Education
7/22/2019	Christ Church Cathedral Foundation 115 S. Conception Street Mobile, Alabama 36693	2019 Employee Matching Gift, Program Support	\$25.00	Faith
7/22/2019	Blacks in Law Enforcement Servicing the Community 155 Woodlawn Avenue Jersey City, New Jersey 07305	Program Support (in lieu of the 4th Annual Fundraiser on August 17, 2019)	\$1,000.00	Family
7/22/2019	Colgate University 13 Oak Drive Hamilton, New York 13346	2019 Employee Matching Gift, Program Support	\$25.00	Education
7/22/2019	Tri-County Scholarship Fund 14 West Main Street Mendham, New Jersey 07945	Program Support (in lieu of the 38th Annual Awards Dinner on October 28, 2019)	\$2,500.00	Education\Scholarship / Tuition Asst.
7/30/2019	ALS Association Greater New York Chapter 42 Broadway Suite 1724 New York, New York 10004	2019 Employee Matching Gift, Program Support	\$25.00	Others

WILLIAM E. SIMON FOUNDATION
EIN: 13-6211778

		2019 Form 990-PF		
7/30/2019	New England College 7 Main Street Henniker, New Hampshire 03242-3293	2019 Director's Designated Gift, Annual Fund	\$30,000.00	Education
8/5/2019	Seton Education Partners 7765 Orien Avenue La Mesa, California 91941	Pledge - Challenge grant for El Camino manual project	\$25,000.00	Faith
8/5/2019	Trinitas Health Foundation P.O. Box 259 Elizabeth, New Jersey 07207	Support of the Peace of Mind Campaign	\$10,000.00	Others
8/5/2019	Semper Fi Fund 825 College Blvd Suite 102, PMB 609 Oceanside, California 92057	Support for programs in New York and New Jersey	\$20,000.00	Family
8/5/2019	Partnership for Inner-City Education 1011 First Avenue 18th Floor New York, New York 10022	Pledge - Challenge grant for support of Bronx schools	\$80,000.00	Education
8/5/2019	ALS Therapy Development Institute 300 Technology Square, Suite 400 Cambridge, Massachusetts 02139	2019 Staff Designated Gift, Program Support	\$500.00	Others
8/5/2019	Student Partner Alliance 561 Springfield Avenue Summit, New Jersey 07901	Pledge - Challenge grant for support for scholarships and mentoring for high school students in Jersey City in the 2019-20 school year	\$2,500.00	Education\Scholarship / Tuition Asst.

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
8/12/2019	Civic Builders 180 Varick Street, Suite 1414 New York, New York 10014	Pledge - Challenge Grant for South Bronx Classical Charter School IV	\$75,000.00	Education
8/12/2019	Team Walker 373 Communipaw Avenue Jersey City, New Jersey 07304	Pledge - Challenge grant for support for the After-school Program in the 2018-19 school year	\$50,000.00	Family
8/12/2019	Court Appointed Special Advocates of Morris and Sussex Counties, Inc. 18 Cattano Avenue Morristown, New Jersey 07963-0264	Program Support for clients in Morristown (outright)	\$10,000.00	Family
8/12/2019	National Alliance for Public Charter Schools 1425 K Street, NW Suite 900 Washington, District of Columbia 20005	Pledge - Challenge grant for Program Support	\$20,000.00	Education
8/12/2019	CompSci High 1300 Boynton Avenue Bronx, New York 10472	Pledge - Challenge grant for general support in the 2018-19 school year	\$15,000.00	Education
8/19/2019	Monmouth Coucil BSA	2019 Staff Desiganted Gift, Support for the Troop 66 Onandaga Pavilion	\$1,000.00	Family
8/19/2019	Northeast Charter Schools Network 2 Tower Place Albany, New York 12203	Support for New York programs	\$10,000.00	Education
8/26/2019	Center Nursery School 11 Center Street Manchester, Connecticut 06040	2019 Staff Designated Gift, Program Support	\$1,000.00	Education

WILLIAM E. SIMON FOUNDATION
EIN: 13-6211778

		2019 Form 990-PF		
8/26/2019	Epiphany School Foundation 234 East 22nd Street New York, New York 10010	2019 Staff Designated Gift, Program Support	\$1,000.00	Education
9/3/2019	Gunston Hall 10709 Gunston Road Mason Neck, Virginia 22079	2019 Staff Designated Gift, Program Support	\$500.00	Others
9/3/2019	ALS Association Greater New York Chapter 42 Broadway Suite 1724 New York, New York 10004	2019 Staff Designated Gift, Program Support	\$500.00	Others
9/3/2019	Fund for American Studies 1706 New Hampshire Avenue, NW Washington, District of Columbia 20009	Program Support (in lieu of the NYC Journalism Dinner on September 12, 2019 honoring Roger Kimball)	\$1,000.00	Education
9/3/2019	Community Foundation of New Jersey P.O. Box 338 35 Knox Hill Road Morristown, New Jersey 07963-0317	Pledge - Partial scholarship support for students attending select schools in and around Morristown for 12/13, 13/14, 14/15, 15/16, 16/17, 17/18 and 18/19 school years; THE BALANCE OF \$48,761 WAS CANCELLED BY THE SC IN FEB 2020	\$25,738.00	Education\Scholarship / Tuition Asst.
9/3/2019	Encounter Books 900 Broadway Suite 601 New York, New York 10003	Program Support (in lieu of the Annual Prize Dinner on October 16, 2019)	\$1,000.00	Others
9/9/2019	Morris Museum 6 Normandy Heights Road Morristown, New Jersey 07960	Program Support (in lieu of the "Graffiti Goes Glam" Gala on September 14, 2019)	\$500.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
9/9/2019	Church of Christ the King P.O. Box 368 Blue Mill Road New Vernon, New Jersey 07976	2019 Employee Matching Gift, Program Support	\$2,500.00	Faith
9/9/2019	Buoniconti Fund to Cure Paralysis, Inc. 1095 NW 14th Terrace Miami, Florida 33136	Program Support (in lieu of the 34th Annual Great Sports Legends Dinner on October 7, 2019)	\$1,000.00	Others
9/16/2019	Community Pediatric Programs of Montefiore Medical Center 853 Longwood Avenue Suite 201 Bronx, New York 10459	Pledge - Challenge grant for support for the Healthy Pregnancy and Well Baby Group Care Program in the South Bronx	\$5,000.00	Family
9/23/2019	Yale New Haven Hospital PO Box 1849 New Haven, Connecticut 06508	2019 Employee Matching Gift, Program Support	\$50.00	Others
9/23/2019	Blacks in Law Enforcement Servicing the Community 155 Woodlawn Avenue Jersey City, New Jersey 07305	Pledge - Challenge Grant for Program Support	\$7,500.00	Family
9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Employee Matching Gift, Program Support	\$50.00	Family

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Employee Matching Gift, Program Support	\$25.00	Family
9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Employee Matching Gift, Program Support	\$25.00	Family
9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Employee Matching Gift, Program Support	\$100.00	Family
9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Employee Matching Gift, Program Support	\$25.00	Family
9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Employee Matching Gift, Program Support	\$25.00	Family
9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Employee Matching Gift, Program Support	\$25.00	Family
9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Employee Matching Gift, Program Support	\$50.00	Family

WILLIAM E. SIMON FOUNDATION
EIN: 13-6211778

9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Form 990-PF 2019 Employee Matching Gift, Program Support	\$25.00	Family
9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Employee Matching Gift, Program Support	\$25.00	Family
9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Employee Matching Gift, Program Support	\$25.00	Family
9/23/2019	Cornerstone Family Programs 80 Washington Street Morristown, New Jersey 07960	2019 Director's Designated Gift, Program Support	\$235.00	Family
9/23/2019	Marine Corps Scholarship Foundation 909 N. Washington Street, Suite 400 Alexandria, Virginia 22314	Program Support (in lieu of the Golf Tournament on October 3, 2019)	\$500.00	Education
9/23/2019	Pacific Research Institute for Public Policy P.O. Box 60485 Pasadena, California 91116	Program Support (in lieu of the 8th Annual Baroness Thatcher Gala Dinner on November 9, 2019, honoring Hon. Christopher Cox)	\$2,500.00	Education
9/30/2019	Breast Cancer Alliance 48 Maple Avenue Greenwich, Connecticut 06830	2019 Director's Designated Gift, Program Support (in lieu of the Annual Luncheon on October 21, 2019)	\$5,000.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
9/30/2019	UCLA Foundation 10889 Wilshire Blvd Suite 1100 Los Angeles, California 90024	Support for the Value Investing Program in the 2019-20 school year	\$20,000.00	Education
9/30/2019	Intercollegiate Studies Institute 3901 Centerville Road Wilmington, Delaware 19807- 1431	Support for the William E. Simon Lecture Series on Religion and Public Life in the 2019-20 school year	\$25,000.00	Faith
9/30/2019	JBWS P.O. Box 1437 Morristown, New Jersey 07962	Pledge - Challenge grant for support for the Carol G. Simon House	\$25,000.00	Family
9/30/2019	Philanthropy Roundtable 1120 20th Street NW Suite 550 South Washington, District of Columbia 20036	Membership Renewal - Program Support	\$10,000.00	Others
9/30/2019	RAINN 1220 L Strett, NW Suite 505 Washington, District of Columbia 20005	2019 Staff Designated Gift, Program Support	\$500.00	Others
9/30/2019	Our Lady of Solitude Monastery P.O. Box 639 Tonopah, Arizona 85354	2019 Employee Matching Gift, Program Support	\$25.00	Faith
10/7/2019	Vroom Street Church 155 Vroom Street Jersey City, New Jersey 07306	Pledge - Challenge grant for support for the 2018 July Jamboree	\$6,357.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
10/7/2019	Children's Scholarship Fund 8 West 38th Street, 9th Floor New York, New York 10018-6229	Pledge - Scholarships for students to attend private schools in Jersey City in 2016-17, 2017-18, 2018-19, and 2019-20	\$156,219.00	Education\Scholarship / Tuition Asst.
10/7/2019	Fidelity Charitable 200 Seaport Boulevard Boston, Massachusetts 02210	2019 Staff Designated Gift, Program Support	\$4,500.00	Others
10/14/2019	Boy Scouts of America Greater New York Councils The Empire State Building 350 Fifth Avenue Suite 7820 New York, New York 10118-0199	Support for the traditional troops in the South Bronx	\$5,000.00	Family
10/14/2019	Federalist Society for Law & Public Policy Studies 1776 I Street NW Suite # 300 Washington, District of Columbia 20006	William E. Simon Lectures in Law Series discussing religion in the public square in the 2019-20 school year	\$30,000.00	Faith
10/14/2019	Saint John's Health Center Foundation 1328 22nd Street Santa Monica, California 90404-2091	2019 Director's Designated Gift, Program Support	\$16,875.00	Others
10/14/2019	Institute on Religion and Public Life 9 East 40th Street 10th Floor New York, New York 10016	Program Support, including the journal First Things	\$40,000.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
10/14/2019	National Right to Work Legal Defense Foundation 8001 Braddock Road Springfield, Virginia 22160	Charter School Legal Defense Program	\$15,000.00	Education
10/14/2019	Saint Joseph's Indian School 1301 North Main Street Chamberlain, South Dakota 57326	2019 Employee Matching Gift, Program Support	\$50.00	Education
10/14/2019	Ramapo for Children 49 West 38th Street 5th Floor New York, New York 10018	Workshops in the South Bronx for parents and educators of special needs children in the 2019-20 school year (outright)	\$7,500.00	Family
10/14/2019	50CAN 1625 K Street NW Suite 400 Washington, District of Columbia 20006	Pledge - Challenge grant for program support for NYCAN	\$10,000.00	Education
10/14/2019	New Jersey Public Charter Schools Association 1 AAA Drive, Suite 206 Hamilton, New Jersey 08691	Program Support	\$10,000.00	Education
10/14/2019	Garden State Initiative P.O. Box 9180 Morristown, New Jersey 07963	Program Support (outright)	\$15,000.00	Others
10/14/2019	Pacific Palisades Task Force on Homelessness P.O. Box 331 Pacific Palisades, California 90272	2019 Director's Designated Gift, Program Support	\$5,000.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
10/14/2019	Philanthropy Roundtable 1120 20th Street NW Suite 550 South Washington, District of Columbia 20036	Support for the Catholic Schools Working Group	\$10,000.00	Education
10/14/2019	Morris Arts 14 Maple Avenue, Suite 301 Morristown, New Jersey 07960	Support for the "Girls Surviving" mentoring program in the 2019-20 school year (outright)	\$3,000.00	Family
10/21/2019	Community Mainstreaming 1025 Old Country Road Suite 325 Westbury, New York 11590	2019 Staff Designated Gift, Program Support	\$500.00	Others
10/21/2019	Big Brothers Big Sisters of Essex, Hudson, and Union Counties 500 Broad St., 2nd Floor Newark, New Jersey 07102	Pledge - Challenge grant for mentoring programs for youth in Jersey City	\$50,000.00	Family
10/21/2019	Future Five 135 Atlantic Street Stamford, Connecticut 06901	2019 Director's Designated Gift, Program Support	\$5,000.00	Family
10/21/2019	Delbarton School 230 Mendham Road Morristown, New Jersey 07960-5089	Support for the Give A Boy A Year scholarship fund	\$5,000.00	Education
10/28/2019	Educators for Excellence 80 Pine Street, 28th Floor New York, New York 10005	Program Support for New York programs (outright)	\$5,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
10/28/2019	Good Grief 38 Elm Street Morristown, New Jersey 07960	2019 Director's Designated Gift, Program Support	\$30,000.00	Family
10/28/2019	Saint Ignatius School 740 Manida Street Bronx, New York 10474	2019 Director's Designated Gift, Program Support	\$5,000.00	Education
10/28/2019	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	Pledge - Challenge grant for Morristown pregnancy center	\$10,000.00	Family
10/28/2019	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	Pledge - Challenge grant for Jersey City pregnancy center	\$10,000.00	Family
10/28/2019	Public Prep 192 E. 151st Street 5th Floor Bronx, New York 10451	Support for Pathways to Power program, as a token of our support for Ian Rowe speaking at the Simon board meeting	\$10,000.00	Education
10/29/2019	Washington Association of New Jersey P.O. Box 1473 Morristown, New Jersey 07962	Program Support (in lieu of the Boxwood Ball on November 2, 2019, honoring Janet & Peter Simon)	\$15,000.00	Others
10/29/2019	Washington Association of New Jersey P.O. Box 1473 Morristown, New Jersey 07962	2019 Director's Designated Gift, Program Support	\$10,000.00	Others
11/4/2019	All Hallows High School 111 East 164th Street Bronx, New York 10452	Pledge - Tuition Assistance for ten students in the 2018-19 and 2019- 20 school years	\$20,000.00	Education\Schol arship / Tuition Asst.

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
11/4/2019	nourish.NJ 36 Sussex Avenue Morristown, New Jersey 07960	Pledge - Challenge grant for support of the Breakfast Program	\$5,000.00	Others
11/4/2019	South Bronx United 192 E. 151st Street 5th Floor Bronx, New York 10451	Pledge - Challenge grant for program support	\$15,000.00	Family
11/4/2019	LAMP Ministries 2704 Schurz Avenue Bronx, New York 10465-3173	Pledge - Challenge grant to support missionary work in the South Bronx	\$3,500.00	Faith
11/4/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	Support for the Patricia A. Kearns Endowment Fund	\$5,000.00	Others
11/4/2019	Episcopal High School 1200 North Quaker Lane Alexandria, Virginia 22302	2019 Director's Designated Gift, Capital Campaign - New Mental Health Services	\$20,000.00	Education
11/11/2019	Good Grief 38 Elm Street Morristown, New Jersey 07960	Program support for Jersey City (outright)	\$20,000.00	Family
11/11/2019	Good Grief 38 Elm Street Morristown, New Jersey 07960	Program support for Morristown (outright)	\$30,000.00	Family
11/11/2019	ALS Association Greater New York Chapter 42 Broadway Suite 1724 New York, New York 10004	2019 Employee Matching Gift, Program Support	\$25.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
11/11/2019	Parents Television Council P.O. Box 4210 Burbank, California 91503	Support for their media research	\$30,000.00	Family
11/11/2019	Civic Builders 180 Varick Street, Suite 1414 New York, New York 10014	Support for South Bronx Charter School Projects (outright)	\$100,000.00	Education
11/11/2019	Civic Builders 180 Varick Street, Suite 1414 New York, New York 10014	Program Support	\$50,000.00	Education
11/11/2019	Loyola School 980 Park Avenue New York, New York 10028	2019 Staff Designated Gift, Program Support	\$1,500.00	Education
11/11/2019	Student Sponsor Partners 424 Madison Avenue, Ste. 1002 New York, New York 10017	Pledge - Support for South Bronx students in the 2019-20, 2020-21, 2021-22 and 2022-23 school years	\$75,000.00	Education
11/21/2019	New City Kids 936 Alpine Ave, NW Grand Rapids, Michigan 49504	General Operating Support for Jersey City in 2019-20 (outright)	\$80,000.00	Family
11/21/2019	Pacific Research Institute for Public Policy P.O. Box 60485 Pasadena, California 91116	Support for Education Research	\$50,000.00	Education
11/21/2019	Hunts Point Alliance for Children P.O. Box 740190 Bronx, New York 10474	Program Support in the 2019-20 school year (outright)	\$35,000.00	Family

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
11/21/2019	Grace Church Van Vorst 39 Erie Street Jersey City, New Jersey 07302	Pledge - Challenge grant for support of the OIKOS programs	\$15,000.00	Faith
11/21/2019	Memories Live Foundation 55 Union Place, Box 164 Summit, New Jersey 07901	Support for Morristown Project	\$5,000.00	Others
11/21/2019	Rocking the Boat 812 Edgewater Road Bronx, New York 10474	Job Skills Program (outright)	\$10,000.00	Family
11/26/2019	UMS-Wright Preparatory School 65 Mobile Street Mobile, Alabama 36607	2019 Staff Designated Gift, Program Support	\$500.00	Education
11/26/2019	Tudor City Greens 5 Tudor City Place Box #1-E New York, New York 10017	2019 Staff Designated Gift, Program Support	\$500.00	Others
11/26/2019	Elon University Johnston Hall 213 2300 Campus Box Elon, North Carolina 27244	2019 Director's Designated Gift, "Elon Leads" Capital Campaign	\$20,000.00	Education
11/26/2019	Church of the Epiphany 239 East 21st Street New York, New York 10010	2019 Staff Designated Gift, Program Support	\$500.00	Faith
11/26/2019	Luther College 700 College Drive Decorah, Iowa 52101	2019 Staff Designated Gift, Program Support	\$500.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
11/26/2019	Sisters of Saint Joseph of Springfield 34 Lower Westfield Road Holyoke, Massachusetts 01040	2019 Staff Designated Gift, Program Support	\$500.00	Faith
11/26/2019	City Gardens Club of New York City 755 Park Avenue New York, New York 10021	2019 Staff Designated Gift, Program Support	\$500.00	Others
11/26/2019	Moving Picture Institute Tribeca Film Center 375 Greenwich Street New York, New York 10013	Program Support, as a token of our appreciation for Nick Reid and Rob Pfaltzgraff showing the "Miss Virginia" film at the JC Luncheon on Nov. 19, 2019	\$5,000.00	Education
11/26/2019	Charter School Growth Fund 10901 W. 120th Ave Suite 450 Broomfield, Colorado 80021	Fund III support to grow high quality charter networks in New York	\$175,000.00	Education
11/26/2019	Deerfield Academy 7 Boyden Lane PO Box 87 Deerfield, Massachusetts 01342	2019 Director Designated Gift, Annual Fund	\$50,000.00	Education
11/26/2019	Saint Vincent de Paul Society - San Rafael 820 B Street PO Box 150527 San Rafael, California 94915	2019 Director's Designated Gift, Vincentian Desk	\$10,000.00	Faith
11/26/2019	nourish.NJ 36 Sussex Avenue Morristown, New Jersey 07960	2019 Director's Designated Gift, Program Support	\$10,000.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
11/26/2019	Adaptive Sports Foundation, Inc. c/o Windham Mountain CD Lane Road Windham, New York 12496	2019 Staff Designated Gift, Program Support	\$500.00	Others
11/26/2019	University of Vermont Grasse Mount 411 Main Street Burlington, Vermont 05401-3470	2019 Director's Designated Gift, Dean of Arts and Sciences Discretionary Fund and Dean of the Honors College Discretionary Fund	\$15,000.00	Education
11/26/2019	Madison Square Boys and Girls Club 250 Bradhurst Avenue New York, New York 10039	2019 Director's Designated Gift, Annual Support	\$35,000.00	Family
11/26/2019	ALFRE Inc. 56 Mt. Kemble Avenue Morristown, New Jersey 07960-5152	2019 Director's Designated Gift, Mrs. Wilson's House	\$5,000.00	Others
11/26/2019	Fordham University Rose Hill Campus Bronx, New York 10458	2019 Staff Designated Gift, Program Support	\$500.00	Education
11/26/2019	Greenwich Country Day School P.O. Box 623 Greenwich, Connecticut 06836	2019 Director's Designated Gift, Headmaster's Discretionary Fund	\$5,000.00	Education
11/26/2019	Dominican Academy 44 East 68th Street New York, New York 10021	2019 Staff Designated Gift, Program Support	\$500.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
11/26/2019	Steven McDonald Memorial Corporation P.O. Box 282 Malverne, New York 11565	2019 Staff Designated Gift, Program Support	\$1,000.00	Others
11/26/2019	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	2019 Director's Designated Gift, Women's Health Philanthropy Council	\$5,833.00	Others
11/26/2019	Archdiocese of Newark 171 Clifton Avenue P.O. Box 9500 Newark, New Jersey 07104-9500	Pledge - Support for a special education project including teacher scholarships, staff salaries in the 2020-21 and 2021-22 school years, and a feasibility study about a standalone special needs school; \$30,000 FOR FEASIBILTY STUDY WAS CHANGED FOR COVID	\$55,000.00	Education
11/26/2019	Bring Change to Mind 155 Sansome Street, Suite 530 San Francisco, California 94104	2019 Director's Designated Gift, Program Support	\$5,000.00-	Others
11/26/2019	Conservation International 2011 Crystal Drive, Suite 600 Arlington, Virginia 22202	2019 Director's Designated Gift, Ocean Fund	\$5,000.00	Others
11/26/2019	Fellowship of Christians in Universities and Schools PO Box 1027 New Canaan, Connecticut 06840	2019 Director's Designated Gift, Program Support	\$2,500.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
11/26/2019	Everglades Foundation 18001 Old Cutter Road, Suite 625 Palmetto Bay, Florida 33157	2019 Director's Designated Gift, Field Family Fund	\$10,000.00	Others
12/9/2019	MOMS Club of Trumbull 50 Iron Gate Road Trumbull, Connecticut 06611	2019 Staff Designated Gift, Program Support	\$500.00	Others
12/9/2019	TECEC PTO 240 Middlebrooks Avenue Trumbull, Connecticut 06611	2019 Staff Designated Gift, Program Support	\$500.00	Education
12/9/2019	Jane Ryan PTA 190 Park Lane Trumbull, Connecticut 06611	2019 Staff Designated Gift, Program Support	\$500.00	Education
12/9/2019	Greenwich Academy 200 North Maple Avenue Greenwich, Connecticut 06830	2019 Director's Designated Gift, Program Support	\$25,000.00	Education
12/9/2019	Birthright of Greater Norwalk 71 East Avenue, Suite E Norwalk, Connecticut 06851	2019 Staff Designated Gift, Program Support	\$500.00	Family
12/9/2019	South Bronx Educational Foundation Inc. 843 Crotona Park North Bronx, New York 10460	2019 Staff Designated Gift, Program Support	\$750.00	Family

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
12/9/2019	Providence College 1 Cunningham Square Providence, Rhode Island 02918-0001	2019 Staff Designated Gift, Angel Fund	\$1,250.00	Education
12/9/2019	Good Counsel 411 Clinton Street P.O. Box 6068 Hoboken, New Jersey 07030-2780	Pledge - Challenge grant for the South Bronx home	\$2,500.00	Family
12/9/2019	National Review Institute 19 W. 44th Street Suite 1701 New York, New York 10036	2019 Staff Designated Gift, Program Support	\$1,000.00	Faith
12/9/2019	Fellowship of Catholic University Students, Inc. P.O. Box 18710 Golden, Colorado 80402	2019 Staff Designated Gift, Program Support	\$500.00	Faith
12/9/2019	US Squash 555 Eighth Avenue, Suite 1102 New York, New York 10018	2019 Director's Designated Gift, Program Support	\$10,000.00	Others
12/9/2019	Malta House 5 Prowitt Street Norwalk, Connecticut 06855	2019 Staff Designated Gift, Program Support	\$500.00	Family
12/9/2019	Interfaith Food Pantry 2 Executive Drive Morris Plains, New Jersey 07950	Pledge - Challenge grant for Program Support	\$6,250.00	Others

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
12/9/2019	Collegiate Cultural Foundation 218 West State Street Media, Pennsylvania 19063	2019 Staff Designated Gift, Love and Fidelity Network	\$500.00	Family
12/9/2019	LAMP Ministries 2704 Schurz Avenue Bronx, New York 10465-3173	2019 Staff Designated Gift, Program Support	\$500.00	Faith
12/9/2019	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	2019 Staff Designated Gift, Program Support	\$500.00	Family
12/9/2019	Spring Street Community Development Corp 65 Spring St. Morristown, New Jersey 07960	Program Support	\$5,000.00	Family
12/16/2019	JerseyCAN 11 Commerce Drive, Suite 310 Cranford, New Jersey 07016	Program Support (outright)	\$5,000.00	Education
12/16/2019	JBWS P.O. Box 1437 Morristown, New Jersey 07962	Support for the Carol G. Simon House	\$15,000.00	Family
12/16/2019	Heridas Pero No Vencidas 514 E. 163rd Street, 7B Bronx, New York 10451	Program Support	\$5,000.00	Faith

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
12/16/2019	Heridas Pero No Vencidas 514 E. 163rd Street, 7B Bronx, New York 10451	2019 Staff Designated Gift, Program Support	\$1,000.00	Faith
12/16/2019	Rocking the Boat 812 Edgewater Road Bronx, New York 10474	2019 Staff Designated Gift, Program Support	\$1,000.00	Family
12/16/2019	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	2019 Staff Designated Gift, Program Support	\$1,000.00	Family
12/16/2019	LAMP Ministries 2704 Schurz Avenue Bronx, New York 10465-3173	Support for missionary work in the South Bronx (outright)	\$6,000.00	Faith
12/16/2019	Roots and Wings Foundation 75 Bloomfield Avenue Suite 303 Denville, New Jersey 07834	2019 Staff Designated Gift, Program Support	\$1,000.00	Family
12/16/2019	Hyde Leadership Charter School 730 Bryant Avenue Bronx, New York 10474	Support for the College Counseling and Post-Secondary Success Program in the 2019-20 School Year	\$7,500.00	Education
12/16/2019	Future Five 135 Atlantic Street Stamford, Connecticut 06901	2019 Staff Designated Gift, Program Support	\$1,000.00	Family

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
12/16/2019	Friends of the Children New York P.O. Box 1649 New York, New York 10026	Support for programs in the South Bronx in the 2019-20 school year (outright)	\$10,000.00	Family
12/16/2019	Friends of the Children New York P.O. Box 1649 New York, New York 10026	2019 Staff Designated Gift, Program Support	\$500.00	Family
12/16/2019	Foundation for Excellence in Education P.O. Box 10691 Tallahassee, Florida 32302	Program Support	\$20,000.00	Education
12/16/2019	Part of the Solution 2759 Webster Avenue Bronx, New York 10458-3708	2019 Staff Designated Gift, Program Support	\$1,000.00	Others
12/16/2019	National Review Institute 19 W. 44th Street Suite 1701 New York, New York 10036	2019 Staff Designated Gift, Program Support	\$1,000.00	Faith
12/16/2019	Gladney Center for Adoption 6300 John Ryan Drive Fort Worth, Texas 76132-4122	Program Support	\$7,500.00	Family
12/16/2019	Gilder Lehrman Institute of American History 49 West 45th Street 6th Floor New York, New York 10036	2019 Staff Designated Gift, Program Support	\$1,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

		2019 Form 990-PF		
12/16/2019	South Bronx Educational Foundation Inc. 843 Crotona Park North Bronx, New York 10460	Program Support (outright)	\$10,000.00	Family
12/16/2019	Becket Fund for Religious Liberty 1200 New Hampshire Avenue, NW Suite 700 Washington, District of Columbia 20036	Support for the Harvard Law Clinic in the 2019-20 school year	\$20,000.00	Faith
12/16/2019	YMCA of Greater New York 2 Castle Hill Road Bronx, New York 10473	Family Support Workshops in the South Bronx in 2020	\$7,500.00	Family
12/16/2019	Little Sisters of the Poor 140 Shepherd Lane Totowa, New Jersey 07512-2170	2019 Employee Matching Gift, Program Support	\$100.00	Faith
12/16/2019	Mercy Center 377 East 145th Street Bronx, New York 10454	Program Support	\$5,000.00	Family
12/16/2019	SoundWaters 1281 Cove Road Stamford, Connecticut 06902	2019 Staff Designated Gift, Program Support	\$500.00	Education
12/16/2019	Brooklyn Boatworks 68 Jay Street, Suite 601A Brooklyn, New York 11201	2019 Staff Designated Gift, Program Support	\$1,000.00	Others
12/16/2019	Red Oaks School 21 Cutler Street Morristown, New Jersey 07960	Middle School Expansion Project	\$50,000.00	Education

WILLIAM E. SIMON FOUNDATION

EIN: 13-6211778

2019 Form 990-PF				
12/23/2019	Preschool Advantage 25 Lindsley Drive Suite 307 Morristown, New Jersey 07960	2019 Director's Designated Gift, Program Support	\$5,000.00	Education
12/23/2019	Community Pediatric Programs of Montefiore Medical Center 853 Longwood Avenue Suite 201 Bronx, New York 10459	Support for the Healthy Pregnancy and Well Baby Group Care Program in the South Bronx (outright)	\$5,000.00	Family
12/23/2019	EdChoice 111 Monument Circle Suite 2650 Indianapolis, Indiana 46250	Support for Research Program	\$5,000.00	Education
12/23/2019	National Council for Adoption 225 North Washington Street Alexandria, Virginia 22314-2520	Program Support (outright)	\$30,000.00	Family
12/23/2019	Big Brothers Big Sisters of Palm Beach and Martin County P.O. Box 910 Hobe Sound, Florida 33475	2019 Director's Designated Gift, Program Support	\$2,500.00	Family
12/23/2019	Corazon Puro 420 E. 156th Street Bronx, New York 10455	Program Support	\$10,000.00	Faith

WILLIAM E. SIMON FOUNDATION
EIN: 13-6211778

2019 Form 990-PF				
12/23/2019	Inner-City Foundation for Charity & Education 238 Jewett Avenue Bridgeport, Connecticut 06606	2019 Director's Designated Gift, Program Support	\$5,000.00	Family
12/23/2019	Washington Association of New Jersey P.O. Box 1473 Morristown, New Jersey 07962	2019 Director's Designated Gift, Program Support	\$10,000.00	Others
12/23/2019	Mayo Performing Arts Center 100 South Street Morristown, New Jersey 07960	2019 Director's Designated Gift, Program Support	\$5,000.00	Education
12/23/2019	Big Brothers Big Sisters of New York City 40 Rector Street 11th Floor New York, New York 10006	Program Support for the South Bronx (outright)	\$20,000.00	Family
12/23/2019	Women for Women International 2000 M Street, NW Suite 200 Washington, District of Columbia 20036	2019 Director's Designated Gift, Program Support	\$5,000.00	Others
12/23/2019	Good Grief 38 Elm Street Morristown, New Jersey 07960	2019 Director's Designated Gift, Program Support	\$12,500.00	Family
12/23/2019	BlinkNow Foundation P.O. Box 453 Mendham, New Jersey 07945	2019 Director's Designated Gift, Program Support	\$5,000.00	Others

WILLIAM E. SIMON FOUNDATION
EIN: 13-6211778

2019 Form 990-PF				
12/23/2019	Sacred Heart School 183 Bayview Avenue Jersey City, New Jersey 07305	Program Support - emergency grant after shooting	\$5,000.00	Education
12/23/2019	Rocking the Boat 812 Edgewater Road Bronx, New York 10474	Pledge - Challenge grant for support of the Jobs Skills Program	\$15,000.00	Family
12/23/2019	EWTN 5817 Old Leeds Road Irondale, Alabama 35210	2019 Employee Matching Gift, Program Support	\$100.00	Faith
12/23/2019	Epiphany School Foundation 234 East 22nd Street New York, New York 10010	2019 Employee Matching Gift, Program Support	\$100.00	Education
		TOTAL	\$7,055,589	

STATEMENT 13

William E. Simon Foundation
EIN 13-6217788
Grants Payable
12/31/2019

	<u>Totals</u>
American Federation for Children Growth Fund	50,000
Archdiocese of Newark	345,000
Assumption College for Sisters	10,000
Children's Scholarship Fund	86,906
Community Foundation of New Jersey	48,751
Foundation for Morristown Medical Center	625,000
Philanthropy Roundtable	270,000
Sound Body Sound Mind Foundation	45,000
Squash and Education Alliance	25,000
Student Sponsor Partners	75,000
Tri-County Scholarship Fund	<u>25,000</u>
Subtotal	1,605,657
Discounted Payable	<u>(20,714)</u>
Total Grants Payable	<u><u>1,584,943</u></u>

WILLIAM E SIMON FOUNDATION

EIN *13-6217788

PART VIII, LINE 1

(A) NAME AND ADDRESS	(B) TITLE AND AVG HOURS WORKED PER WEEK	(C) CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	(D) EXPENSE ACCT OTHER ALLOWANCES	(E) COMPENSATION
J PETER SIMON C/O SIMON QUICK ADVISORS, LLC 360 MT KEMBLE AVENUE MORRISTOWN, NJ 07960	DIRECTOR/ CO-CHAIRMAN AS REQUIRED	0	0	0
WILLIAM E SIMON, JR C/O SIMON QUICK ADVISORS, LLC 360 MT KEMBLE AVENUE MORRISTOWN, NJ 07960	DIRECTOR/ CO-CHAIRMAN/ ASST SECRETARY AS REQUIRED	0	0	0
MARY B SIMON STREEP C/O SIMON QUICK ADVISORS, LLC 360 MT KEMBLE AVENUE MORRISTOWN, NJ 07960	DIRECTOR AS REQUIRED	0	0	0
CAROL LEIGH SIMON PORGES C/O SIMON QUICK ADVISORS, LLC 360 MT KEMBLE AVENUE MORRISTOWN, NJ 07960	VICE PRESIDENT/ TREASURER DIRECTOR AS REQUIRED	0	0	0
AIMEE SIMON BLOOM C/O SIMON QUICK ADVISORS, LLC 360 MT KEMBLE AVENUE MORRISTOWN, NJ 07960	VICE PRESIDENT/ SECRETARY DIRECTOR AS REQUIRED	0	0	0
JULIE SIMON MUNRO C/O SIMON QUICK ADVISORS, LLC 360 MT KEMBLE AVENUE MORRISTOWN, NJ 07960	DIRECTOR AS REQUIRED	0	0	0
JOHANNA K SIMON C/O SIMON QUICK ADVISORS, LLC 360 MT KEMBLE AVENUE MORRISTOWN, NJ 07960	DIRECTOR AS REQUIRED	0	0	0
DANIEL MOSLEY C/O SIMON QUICK ADVISORS, LLC 360 MT KEMBLE AVENUE MORRISTOWN, NJ 07960	DIRECTOR AS REQUIRED	0	0	0
JAMES PIERESON C/O WILLIAM E SIMON FOUNDATION 140 E. 45TH STREET NEW YORK, NY 10017	PRESIDENT/ DIRECTOR 40 HOURS	60,668	0	242,000
WILLIAM WACHENFELD C/O SIMON QUICK ADVISORS, LLC 360 MT KEMBLE AVENUE MORRISTOWN, NJ 07960	DIRECTOR AS REQUIRED	0	0	0
MICHAEL OLIVERI C/O SIMON QUICK ADVISORS, LLC 360 MT KEMBLE AVENUE MORRISTOWN, NJ 07960	ASSISTANT TREASURER AS REQUIRED	0	0	0
TOTAL		\$ 60,668	\$ -	\$ 242,000

WILLIAM E SIMON FOUNDATION

EIN 13-6217788

PART VIII, LINE 2 (A) NAME AND ADDRESS	(B) TITLE AND AVG HOURS WORKED PER WEEK	(C) CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	(D) EXPENSE ACCT OTHER ALLOWANCES	(E) COMPENSATION
SARA SNIDER C/O WILLIAM E. SIMON FOUNDATION 140 E. 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 62,694	\$ -	\$ 191,615
AMY ALLRED C/O WILLIAM E. SIMON FOUNDATION 140 E. 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 44,973	\$ -	\$ 107,277
KAREN KEENAN C/O WILLIAM E. SIMON FOUNDATION 140 E 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 39,725	\$ -	\$ 105,662
JANICE RIDDELL C/O WILLIAM E SIMON FOUNDATION 140 E 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 27,279	\$ -	\$ 126,875
TOTAL		<u>\$ 174,671</u>	<u>\$ -</u>	<u>\$ 531,429</u>