

C&E
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Form 990-PF

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
CARSON FAMILY CHARITABLE TRUST

Number and street (or P O box number if mail is not delivered to street address) Room/suite
650 MADISON AVENUE 26TH FLOOR

City or town, state or province, country, and ZIP or foreign postal code
NEW YORK, NY 10022

A Employer identification number
13-6957038

B Telephone number
212-899-5983

C If exemption application is pending, check here ☐

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

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

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

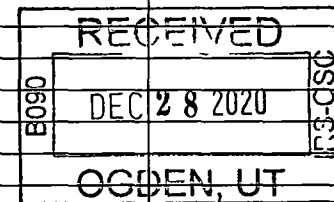
G Check all that apply. ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)
\$ 218,043,291.

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

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	77,278,656.		N/A	
2	Check <input type="checkbox"/> If the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	176,935.	176,935.		Statement 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	61,532,774.			
b	Gross sales price for all assets on line 6a	89,482,493.			
7	Capital gain net income (from Part IV, line 2)		60,866,292.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss)				
11	Other income	52,833.	173,293.		Statement 2
12	Total. Add lines 1 through 11	139,041,198.	61,216,520.		
13	Compensation of officers, directors, trustees, etc.	579,190.	197,925.		381,265.
14	Other employee salaries and wages	186,050.	0.		186,050.
15	Pension plans, employee benefits	335,300.	69,440.		265,860.
16a	Legal fees Stmt 3	213.	0.		213.
b	Accounting fees				
c	Other professional fees Stmt 4	1,259,178.	1,254,952.		4,226.
17	Interest				
18	Taxes Stmt 5	1,092,371.	0.		0.
19	Depreciation and depletion				
20	Occupancy	500,190.	125,048.		375,142.
21	Travel, conferences, and meetings	7,673.	1,918.		5,755.
22	Printing and publications				
23	Other expenses Stmt 6	100,976.	23,121.		77,855.
24	Total operating and administrative expenses. Add lines 13 through 23	4,061,141.	1,672,404.		1,296,366.
25	Contributions, gifts, grants paid	45,106,124.			45,106,124.
26	Total expenses and disbursements. Add lines 24 and 25	49,167,265.	1,672,404.		46,402,490.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	89,873,933.			
b	Net investment income (if negative, enter -0-)		59,544,116.		
c	Adjusted net income (if negative, enter -0-)			N/A	



Part II Balance Sheets		Beginning of year (a) Book Value	End of year	
			(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing		4,396,095.	4,396,095.
	2 Savings and temporary cash investments	34,334,769.	73,796,097.	73,796,097.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock Stmt 8	16,079,939.	66,981,615.	66,981,615.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Liabilities	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other Stmt 9	59,231,617.	72,869,484.	72,869,484.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	109,646,325.	218,043,291.	218,043,291.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
Net Assets or Fund Balances	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> X and complete lines 24, 25, 29, and 30.			
	24 Net assets without donor restrictions	109,646,325.	218,043,291.	
	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	109,646,325.	218,043,291.	
	30 Total liabilities and net assets/fund balances	109,646,325.	218,043,291.	

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	109,646,325.
2 Enter amount from Part I, line 27a	2	89,873,933.
3 Other increases not included in line 2 (itemize) ▶ See Statement 7	3	18,523,033.
4 Add lines 1, 2, and 3	4	218,043,291.
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	218,043,291.

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Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e 89,482,493.		28,616,201.	60,866,292.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			60,866,292.

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	60,866,292.
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	45,376,812.	98,579,587.	.460306
2017	43,805,355.	80,327,390.	.545335
2016	35,494,033.	57,513,634.	.617141
2015	31,259,695.	67,843,635.	.460761
2014	34,181,072.	58,433,720.	.584955

2 Total of line 1, column (d)	2	2.668498
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	.533700
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	161,387,136.
5 Multiply line 4 by line 3	5	86,132,314.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	595,441.
7 Add lines 5 and 6	7	86,727,755.
8 Enter qualifying distributions from Part XII, line 4	8	46,402,490.

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.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a ACCOLADE II	P		
b ACCOLADE III	P		
c ACCOLADE IV	P		
d ACCOLADE V	P		
e ACCOLADE VI	P		
f ACCOLADE VII	P		
g ACCOLADE GROWTH	P		
h THACKERAY II	P		
i THACKERAY III	P		
j THACKERAY IV	P		
k EMERGENCE PARTNERS	P		
l EMERGENCE II			
m EMERGENCE III			
n EMERGENCE IV			
o WCAS XI - A	P		

(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 1,106,144.			1,106,144.
b 5,320,185.			5,320,185.
c 993,385.			993,385.
d 271,520.			271,520.
e 8,876.			8,876.
f 3.			3.
g 3.			3.
h 759,310.			759,310.
i 1,895,835.			1,895,835.
j 688,075.			688,075.
k 136.			136.
l		221,691.	-221,691.
m		232,113.	-232,113.
n		3,885.	-3,885.
o 3,606.			3,606.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			1,106,144.
b			5,320,185.
c			993,385.
d			271,520.
e			8,876.
f			3.
g			3.
h			759,310.
i			1,895,835.
j			688,075.
k			136.
l			-221,691.
m			-232,113.
n			-3,885.
o			3,606.

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

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

CARSON FAMILY CHARITABLE TRUST

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	WCAS XI CO			
b	WCAS XI - AIM	P		
c	VEEVA SYSTEMS	P		
d	ZOOM	P		
e	GOLDMAN SACHS	P		
f	SUBJECT TO UBIT			
g				
h				
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a		194,623.	-194,623.
b	22,858.		22,858.
c	1,875,889.	3,966.	1,871,923.
d	528,562.	7,014.	521,548.
e	76,008,106.	27,286,427.	48,721,679.
f		666,482.	-666,482.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-194,623.
b			22,858.
c			1,871,923.
d			521,548.
e			48,721,679.
f			-666,482.
g			
h			
i			
j			
k			
l			
m			
n			
o			

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	60,866,292.
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 VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	1,190,882.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3 Add lines 1 and 2		3	1,190,882.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	1,190,882.
6 Credits/Payments:			
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	826,507.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	650,000.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	1,476,507.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" 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	285,625.	
11 Enter the amount of line 10 to be Credited to 2020 estimated tax	11	285,625.	Refunded

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <u>NY</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	X	
14 The books are in care of ► <u>The Organization</u> Telephone no. ► <u>212-899-5983</u> Located at ► <u>650 MADISON AVENUE 26TH FLOOR, NEW YORK, NY</u> ZIP+4 ► <u>10022</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year		
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 checked="" type="checkbox"/> Yes <input 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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
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

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

		Yes	No
5a During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	N/A	5b	
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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 10		579,190.	145,531.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DOROTHY ROBERTS - 650 MADISON AVENUE, NEW YORK, NY 10022	ADMIN	186,050.	42,112.	0.

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

0

Form 990-PF (2019)

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
ACCOLADE PARTNERS 2001 M STREET NW, WASHINGTON, DC 20036	INVESTMENTS	735,809.
EMERGENCE CAPITAL 160 BOVET ROAD, SAN MATEO, CA 94402	INVESTMENTS	321,892.
GROWTH CATALYST PARTNERS 318 W ADAMS STREET, CHICAGO, IL 60606	INVESTMENTS	186,796.

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

0

Part IX-A Summary of Direct Charitable Activities

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

Expenses

1	N/A	
2		
3		
4		

Part IX-B Summary of Program-Related Investments

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

Amount

1	N/A	
2		
3	All other program-related investments. See instructions.	

Total. Add lines 1 through 3

0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	107,581,328.
b	Average of monthly cash balances	1b	56,263,480.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	163,844,808.
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	163,844,808.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	2,457,672.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	161,387,136.
6	Minimum investment return. Enter 5% of line 5	6	8,069,357.

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	8,069,357.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	1,190,882.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	26,485.
c	Add lines 2a and 2b	2c	1,217,367.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	6,851,990.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	6,851,990.
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	6,851,990.

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	46,402,490.
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	46,402,490.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	46,402,490.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				6,851,990.
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	31,601,644.			
b From 2015	28,310,035.			
c From 2016	33,011,263.			
d From 2017	40,731,457.			
e From 2018	40,992,943.			
f Total of lines 3a through e	174,647,342.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ 46,402,490.				
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				6,851,990.
e Remaining amount distributed out of corpus	39,550,500.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	214,197,842.			
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	31,601,644.			
9 Excess distributions carryover to 2020 Subtract lines 7 and 8 from line 6a	182,596,198.			
10 Analysis of line 9:				
a Excess from 2015	28,310,035.			
b Excess from 2016	33,011,263.			
c Excess from 2017	40,731,457.			
d Excess from 2018	40,992,943.			
e Excess from 2019	39,550,500.			

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

- 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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED LIST #11 C/O ORGANIZATION 650 MADISON AVENUE NEW YORK, NY 10022		PC	SEE ATTACHED LIST	45,106,124.
Total			▶ 3a	45,106,124.
b Approved for future payment SEE ATTACHED LIST #11 C/O ORGANIZATION 650 MADISON AVENUE NEW YORK, NY 10022		PC	SEE ATTACHED LIST	103,546,267.
Total			▶ 3b	103,546,267.

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Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2019

Name of the organization

Employer identification number

CARSON FAMILY CHARITABLE TRUST**13-6957038**

Organization type (check one)

Filers of:**Section:**

Form 990 or 990-EZ

- ☐ 501(c)() (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization

Employer identification number

CARSON FAMILY CHARITABLE TRUST**13-6957038****Part I Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	<u>RUSSELL CARSON</u> <u>650 MADISON AVENUE</u> <u>NEW YORK, NY 10022</u>	\$ <u>77,278,656.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Employer identification number

13-6957038

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Name of organization

Employer identification number

CARSON FAMILY CHARITABLE TRUST**13-6957038**

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info once) ▶ \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

Form 990-PF	Dividends and Interest from Securities				Statement	1
Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	
VARIOUS	176,935.	0.	176,935.	176,935.		
To Part I, line 4	176,935.	0.	176,935.	176,935.		

Form 990-PF	Other Income			Statement	2
Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income		
UBIT THRU PARTNERSHIPS	52,833.	173,293.			
Total to Form 990-PF, Part I, line 11	52,833.	173,293.			

Form 990-PF	Legal Fees			Statement	3
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
LEGAL SERVICES	213.	0.		213.	
To Fm 990-PF, Pg 1, ln 16a	213.	0.		213.	

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	
INVESTMENT THRU PARTNERSHIPS	1,253,544.	1,253,544.		0.	
PAYROLL PROCESSING	5,634.	1,408.		4,226.	
To Form 990-PF, Pg 1, ln 16c	1,259,178.	1,254,952.		4,226.	

Form 990-PF	Taxes			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
EXCISE	1,055,000.	0.		0.	
UBIT - FEDERAL	30,000.	0.		0.	
UBIT - NY	7,371.	0.		0.	
To Form 990-PF, Pg 1, ln 18	1,092,371.	0.		0.	

Form 990-PF	Other Expenses			Statement	6
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
PROGRAM COSTS	6,993.	0.		6,993.	
OFFICE	33,947.	8,487.		25,460.	
TECHNOLOGY	58,536.	14,634.		43,902.	
NYS FILING FEE	1,500.	0.		1,500.	
To Form 990-PF, Pg 1, ln 23	100,976.	23,121.		77,855.	

Form 990-PF	Other Increases in Net Assets or Fund Balances			Statement	7
Description	Amount				
PRIOR PERIOD ADJUSTMENTS	5,152,880.				
CHANGE IN APPRECIATION	13,370,153.				
Total to Form 990-PF, Part III, line 3	18,523,033.				

Form 990-PF	Corporate Stock	Statement	8
Description	Book Value	Fair Market Value	
SELECT MEDICAL HOLDINGS	66,981,615.	66,981,615.	
Total to Form 990-PF, Part II, line 10b	66,981,615.	66,981,615.	

Form 990-PF	Other Investments	Statement	9
Description	Valuation Method	Book Value	Fair Market Value
ACCOLADE II	FMV	3,378,092.	3,378,092.
ACCOLADE III	FMV	11,556,733.	11,556,733.
ACCOLADE IV	FMV	6,307,140.	6,307,140.
ACCOLADE V	FMV	7,097,196.	7,097,196.
EMERGENCE CAPITAL PARTNERS	FMV	213,105.	213,105.
EMERGENCE CAPITAL ASSOC	FMV	429,809.	429,809.
EMERGENCE CAPITAL II	FMV	1,619,616.	1,619,616.
EMERGENCE CAPITAL III	FMV	3,391,857.	3,391,857.
EMERGENCE CAPITAL IV	FMV	2,957,443.	2,957,443.
THACKERAY II	FMV	227,443.	227,443.
THACKERAY III	FMV	2,049,767.	2,049,767.
THACKERAY IV	FMV	3,882,522.	3,882,522.
THACKERAY V	FMV	1,125,257.	1,125,257.
WCAS IX CO	FMV	12,611,662.	12,611,662.
WCAS GP USAP	FMV	945,308.	945,308.
WCAS XI	FMV	3,443,205.	3,443,205.
ACCOLADE VI	FMV	2,778,297.	2,778,297.
ACCOLADE VII	FMV	446,257.	446,257.
ACCOLADE GROWTH I	FMV	668,571.	668,571.
EMERGENCE	FMV	685,000.	685,000.
GROWTH CATALYST	FMV	5,580,594.	5,580,594.
GCP - CRA	FMV	1,448,020.	1,448,020.
WCAS XI - AIM	FMV	26,590.	26,590.
Total to Form 990-PF, Part II, line 13		72,869,484.	72,869,484.

Form 990-PF

Part VIII - List of Officers, Directors
Trustees and Foundation Managers

Statement 10

Name and Address	Title and Avrg Hrs/Wk	Compen- sation	Employee Ben Plan Contrib	Expense Account
EDWARD S CARSON C/O ORGANIZATION 650 MADISON AVENUE NEW YORK, NY 10022	CO-TRUSTEE 15.00	25,000.	0.	0.
JUDITH CARSON C/O ORGANIZATION 650 MADISON AVENUE NEW YORK, NY 10022	CO TRUSTEE 15.00	0.	0.	0.
RUSSELL CARSON C/O ORGANIZATION 650 MADISON AVENUE NEW YORK, NY 10022	CO TRUSTEE 20.00	0.	0.	0.
CECILY CARSON C/O ORGANIZATION 650 MADISON AVENUE NEW YORK, NY 10022	CO TRUSTEE 40.00	290,290.	65,585.	0.
AMY STEVENS C/O ORGANIZATION 650 MADISON AVENUE NEW YORK, NY 10022	EXECUTIVE VICE PRESIDENT 40.00	263,900.	79,946.	0.
Totals included on 990-PF, Page 6, Part VIII		579,190.	145,531.	0.

Carson Family Charitable Trust
Grants Paid/Payable

Name	Project Title	Grant Paid	Grant Payable
Achievement First	general operating expenses	\$ 350,000	\$ 350,000
	To provide pro bono representation to immigrants at the		
	border	25,000	25,000
American Immigration Council	general operating support	100,000	200,000
American Museum of Natural History	General Support	100,000	400,000
American Red Cross- Greater New York Region	Runway Startup Post Doc Program at Jacobs Institute	100,000	100,000
American Technion Society	Year-end Gift	15,000	
Association to Benefit Children	general operating expenses	100,000	300,000
Beginning with Children Foundation	NED School to Work Coordinator	82,434	
Berkshire Taconic Community Foundation	Mobile Case Management. Client Advocates	172,700	545,600
Berkshire Taconic Community Foundation	Collaborative Grant and Latino Outreach Programs	47,000	
Berkshire Taconic Community Foundation	Funding for NYC Expansion	100,000	
Braven	General Support	250,000	500,000
Breaking Ground HDfC	General Support	50,000	50,000
Brooklyn Botanic Garden	2019 Annual Fund	10,000	
Brooklyn Botanic Garden	in the immigration space	400,000	
Brooklyn Community Bail Fund	Operating	100,000	
Brooklyn Community Bail Fund	General Support	100,000	100,000
Brooklyn Public Library	2019 Annual Fund	10,000	
Brooklyn Public Library	Support of CRI-Carson Family Fellows	117,000	234,000
Cancer Research Institute	General Support	25,000	75,000
Cary Institute of Ecosystem Studies	Harlem Meer Project: North End of Central Park	1,500,000	8,500,000
Central Park Conservancy	six-year pledge to the Woodlands and the Institute for Urban		
Central Park Conservancy	Parks	500,000	2,000,000
Central Park Conservancy	General Support	50,000	
Central Queens Academy Charter School	General Support	50,000	100,000
Children's Aid Society	4 year, \$1,000,000 grant	250,000	250,000
Citizen Schools, Inc.	NY Operations	50,000	
Classroom, Inc.	general operating support	100,000	
Collegiate School, Inc.	General Support	10,000	
Columbia Business School	Glenn Hubbard Scholarship Fund	100,000	900,000
Columbia Business School	Professor Horton	50,000	
Columbia Business School	July	50,000	
Columbia Business School	Capital Campaign	4,000,000	11,250,000
Convent of the Sacred Heart	Year-end Gift	10,000	
Cooperate Inc	COOP Careers NYC Operations	100,000	500,000
Cornell University	General Support	15,000	
Cristo Rey Brooklyn High School	general operating expenses	50,000	
Cristo Rey New York High School	Support of College Placement and Guidance	100,000	300,000
	\$100K for Annual Fund and \$100k in honor of Cecily's		
Dartmouth College	Carson's 25th Reunion	200,000	
	to be used on a current, unrestricted basis to address the		
	College's priorities at the discretion of the President of		
Dartmouth College	Dartmouth College	1,000,000	5,000,000
Dutchess Land Conservancy	General Support	25,000	
East Harlem School at Exodus House	Year-end gift	20,000	
Educators 4 Excellence	NYC Operations	150,000	450,000
Equal Justice Initiative	General Operating Support	250,000	750,000

Carson Family Charitable Trust
Grants Paid/Payable

Name	Project Title	Grant Paid	Grant Payable
Equity Project Charter School	General Support	25,000	50,000
Exalt Youth	Expansion plans	150,000	300,000
Exalt Youth	Year-end Gift	50,000	
Excellence Community Schools Inc	General operating expenses	200,000	200,000
Fisher House Foundation, Inc.	Bronx Fisher House	100,000	300,000
Fund for the City of New York	Center for Court Innovation	250,000	250,000
Goddard Riverside Community Center	General Support	200,000	200,000
Good Shepherd Services	General Operating	500,000	500,000
Harlem Children's Zone	General Support	500,000	1,000,000
Harlem Educational Activities Fund	General Operating Support	50,000	50,000
Harvard T.H. Chan School of Public Health	scholarships at the Harvard School of Public Health	100,000	100,000
Hospital for Special Surgery Fund	Support of Dr. Laura Donlin Research	200,000	800,000
Immigrant Defense Project	Unrestricted Support	150,000	300,000
International Rescue Committee, Inc.	general operating expenses	500,000	500,000
Kenyon College	to be used to provide financial aid to deserving students	125,000	750,000
Kenyon College	Year-end Gift	10,000	
Kessler Foundation	Center for Spinal Stimulation	50,000	150,000
KIPP New York	New York Operations	500,000	1,000,000
Lincoln Center for the Performing Arts	2019 Annual Fund	250,000	
Service	Unrestricted gift	100,000	400,000
Manhattan Institute	general operating support	50,000	
Marymount Manhattan College	Year-end Gift	50,000	
Melanoma Research Alliance Foundation	General Support	75,000	150,000
Memorial Sloan-Kettering Cancer Center	President's Strategic Initiatives Fund	500,000	500,000
	Original grant to support Breuer Building redirected to Covid-		
Metropolitan Museum of Art	19 Support for 2020	500,000	4,500,000
Metropolitan Museum of Art	For Education Program	50,000	200,000
	\$50,000 already made in June for Education Initiatives so		
Metropolitan Museum of Art	\$50,000 unrestricted gift	50,000	
Metropolitan Opera Association	general operating support	100,000	200,000
Miami Music Project	General Operating	25,000	50,000
Miami Music Project	Gift in memory of Carol Reich	25,000	
Museum of Arts and Design	General Support	50,000	
National College Advising Corps Inc.	Push for 100 College Advisors in NYC	100,000	200,000
the World Trade Center	Memorial Glade	100,000	
the World Trade Center	General Support	75,000	
Neighborhood Coalition for Shelter	General Operating Support	150,000	300,000
Neighborhood Trust	General Support	250,000	500,000
New Classrooms	general operating support	100,000	
New York Academy of Sciences	After school STEM mentoring	100,000	300,000
New York City Foundation for Computer Science Education	Computer Science For All	200,000	600,000
New York Genome Center	2019 Grant/Simons Match	10,000,000	25,000,000
New York Hall of Science	General Support	100,000	200,000
New York Historical Society	general operating support	250,000	250,000
New York Philharmonic	general operating support	100,000	200,000
New York Public Library	Unrestricted gift	500,000	2,000,000
New York Public Radio	general operating support for WQXR Division	500,000	1,500,000

Carson Family Charitable Trust
Grants Paid/Payable

Name	Project Title	Grant Paid	Grant Payable
New York Public Radio	General Support	100,000	
New York Stem Cell Foundation	Five-year commitment for general operating support proceeds to be applied to the construction, equipping and operation of the Hospital for Women and Newborns in the	200,000	400,000
New York-Presbyterian Hospital	David H. Koch building of the Hospital	2,000,000	4,000,000
New York-Presbyterian Hospital	General Support	100,000	
Notre Dame School	General Support	100,000	300,000
Partners In Health	for Haiti operations	100,000	750,000
	Funding should be restricted to Rwandan PIH site and allocated under the direction of Executive Director Joel		
Partners In Health	Mubiligi	250,000	
Peer Health Exchange	Impact Capital and their strategic plan	150,000	300,000
Planned Parenthood of New York City	General Support	100,000	
Prospect Park Alliance Inc	General Support	50,000	50,000
ReadWorks	General Support	100,000	
Red Hook Initiative	Capital Campaign	250,000	250,000
Red Hook Initiative	Operating Grant	333,333	666,667
Relay Graduate School of Education	NYC Operations	250,000	750,000
Right to Play United States	General Support	50,000	100,000
Robert A. Toigo Foundation	General Operating Support	100,000	300,000
Robin Hood Foundation	2019 \$5 million gift to RH to be paid as directed	2,250,000	
Rockefeller University	Year-End Gift	100,000	
Rockefeller University	President's Fund in honor of Rick Lifton	2,000,000	8,000,000
Rockefeller University	unrestricted use as part of the University's Capital Campaign	3,000,000	6,000,000
Seizing Every Opportunity	General Support	750,000	750,000
Seton Education Partners	Brilla expansion in NYC	250,000	250,000
St. John's Bread and Life	General Support	50,000	
Student Sponsor Partners	General Support	200,000	400,000
Success Academy Charter Schools	general operating expenses	250,000	500,000
Teach For America	New York City operations	200,000	
Teaching Matters	general operating support	50,000	50,000
The Child Center of NY	upon request	250,000	
The Child Center of NY	upon request	250,000	
The Children's Health Fund	General Operating Support	250,000	250,000
The Education Trust	NY Operations	100,000	
The Foundation for Vassar Brothers Medical Center	Construction of new building	100,000	400,000
The NYC Center For Charter School Excellence	General Operating	500,000	500,000
The Partnership Schools	general operating support	1,000,000	2,000,000
U.S. Foundation for the Commemoration of World Wars	General Support	25,000	50,000
Uncommon Schools	General Support	250,000	
Upwardly Global	General Operating	150,000	150,000
WNET New York	American Master's Mae West Film	25,000	
Misc. adjustments	General Support	(21,344)	
		<u>45,106,124</u>	<u>103,546,267</u>