efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491318009160

Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No. 1545-0052

2019

Open to Public Inspection

For calendar year 2019, or tax year beginning 01-01-2019 , and ending 12-31-2019

Name of foundation
WESTREICH FOUNDATION

A Employer identification number
20-3598096

Number and street (or P.O. box number if mail is not delivered to street address)
CO RUTH WESTREICH PO BOX 3601

Room/suite

B Telephone number (see instructions)
(858) 759-1116

City or town, state or province, country, and ZIP or foreign postal code
RANCHO SANTA FE, CA 92067

C If exemption application is pending, check here ▶ ☐

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

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

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

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

I Fair market value of all assets at end of year (from Part II, col. (c), *line 16)* ▶$ 19,508,113

J Accounting method: ☑ Cash ☐ Accrual ☐ Other (specify) ____
(Part I, column (d) must be on cash basis.)

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

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

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)	4,882,036			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	28,942	28,942		
	4	Dividends and interest from securities . . .	234,600	234,600		
	5a	Gross rents				
	b	Net rental income or (loss) ____				
	6a	Net gain or (loss) from sale of assets not on line 10	6,681,227			
	b	Gross sales price for all assets on line 6a 21,989,398				
	7	Capital gain net income (from Part IV, line 2) . . .		6,681,227		
	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) (attach schedule)				
	11	Other income (attach schedule)	691	691		
	12	**Total.** Add lines 1 through 11	11,827,496	6,945,460		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions) . . .	2,524	0		0
	19	Depreciation (attach schedule) and depletion . . .				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	304,939	167,095		6,357
	24	**Total operating and administrative expenses.** Add lines 13 through 23	307,463	167,095		6,357
	25	Contributions, gifts, grants paid	939,125			939,125
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,246,588	167,095		945,482
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	10,580,908			
	b	**Net investment income** (if negative, enter -0-)		6,778,365		
	c	**Adjusted net income** (if negative, enter -0-) . . .				

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

	Line	Description	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	3,623,804	1,523,426	1,523,426
	3	Accounts receivable ▶ ______ Less: allowance for doubtful accounts ▶ ______			
	4	Pledges receivable ▶ ______ Less: allowance for doubtful accounts ▶ ______			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ ______ 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 (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,383,402	1,335,069	3,806,402
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment: basis ▶ ______ Less: accumulated depreciation (attach schedule) ▶ ______			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,849,405	10,327,425	14,178,285
	14	Land, buildings, and equipment: basis ▶ ______ Less: accumulated depreciation (attach schedule) ▶ ______			
	15	Other assets (describe ▶ ______)			
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	6,856,611	13,185,920	19,508,113
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ ______)	92,855	0	
	23	**Total liabilities**(add lines 17 through 22)	92,855	0	
Net Assets or Fund Balances		**Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.**			
	24	Net assets without donor restrictions			
	25	Net assets with donor restrictions			
		Foundations that do not follow FASB ASC 958, check here ▶ ☑ and complete lines 26 through 30.			
	26	Capital stock, trust principal, or current funds	0	0	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28	Retained earnings, accumulated income, endowment, or other funds	6,763,756	13,185,920	
	29	**Total net assets or fund balances** (see instructions)	6,763,756	13,185,920	
	30	**Total liabilities and net assets/fund balances** (see instructions)	6,856,611	13,185,920	

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	6,763,756
2	Enter amount from Part I, line 27a	2	10,580,908
3	Other increases not included in line 2 (itemize) ▶ ______	3	0
4	Add lines 1, 2, and 3	4	17,344,664
5	Decreases not included in line 2 (itemize) ▶ ______	5	4,158,744
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	13,185,920

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	See Additional Data Table			
b				
c				
d				
e				

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

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) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
a	See Additional Data Table			
b				
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	6,681,227
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see 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	458,850	10,272,293	0.044669
2017	443,000	10,897,376	0.040652
2016	381,000	9,800,623	0.038875
2015	590,239	11,268,133	0.052381
2014	767,481	12,040,821	0.063740

2 Total of line 1, column (d)	2	0.240317
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.048063
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	15,747,649
5 Multiply line 4 by line 3	5	756,879
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	67,784
7 Add lines 5 and 6	7	824,663
8 Enter qualifying distributions from Part XII, line 4 , ...	8	945,482

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ________ (attach copy of letter if necessary–see instructions)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	67,784
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	67,784
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	67,784
6	Credits/Payments:				
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	18,741		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	70,000		
d	Backup withholding erroneously withheld	6d	0		
7	Total credits and payments. Add lines 6a through 6d			7	88,741
8	Enter any **penalty** for underpayment of estimated tax. Check here ☑ 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	20,957
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ 20,957	**Refunded** ▶		11	0

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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition)	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0 **(2)** On foundation managers. ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
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*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
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?	6	Yes	
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.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ DE			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
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 taxable year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VII-A Statements Regarding Activities (continued)

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶WWW.THEWESTREICHFOUNDATION.ORG

14 The books are in care of ▶STANLEY I WESTREICH Telephone no. ▶(858) 759-1116

Located at ▶PO BOX 3601 RANCHO SANTA FE CA ZIP+4 ▶92067

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —check here . . . ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year . . . ▶ 15

		Line	Yes	No
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?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

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.

			Line	Yes	No
1a	During the year did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?.	☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?.	☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.).	☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions		1b		
	Organizations relying on a current notice regarding disaster assistance check here. ▶	☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?.		1c		No
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 (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019?.	☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____				
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.)		2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20____ , 20____ , 20____ , 20____				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?.	☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2019 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2019.)*.		3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		No
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?		4b		No

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

		Yes/No		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))?	☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions		**5b**		
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐				
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).				
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		**6b**		No
	If "Yes" to 6b, file Form 8870.				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☑ No			
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?		**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 during the year?	☐ Yes ☑ No			

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

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
RUTH WESTREICH PO BOX 3601 RANCHO SANTA FE, CA 92067	PRESIDENT 0.00	0	0	0
STANLEY I WESTREICH PO BOX 3601 RANCHO SANTA FE, CA 92067	TREASURER 0.00	0	0	0

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

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
NONE				

Total number of other employees paid over $50,000. ▶ 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		
Total number of others receiving over $50,000 for professional services. . . . . ▶		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	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions. 3	
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	10,778,523
b	Average of monthly cash balances.		1b	725,582
c	Fair market value of all other assets (see instructions).		1c	4,483,356
d	**Total** (add lines 1a, b, and c).		1d	15,987,461
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	15,987,461
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).		4	239,812
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4		5	15,747,649
6	**Minimum investment return.** Enter 5% of line 5.		6	787,382

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	787,382
2a	Tax on investment income for 2019 from Part VI, line 5.	2a 67,784		
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b		
c	Add lines 2a and 2b.		2c	67,784
3	Distributable amount before adjustments. Subtract line 2c from line 1.		3	719,598
4	Recoveries of amounts treated as qualifying distributions.		4	0
5	Add lines 3 and 4.		5	719,598
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	719,598

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	945,482
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	945,482
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	67,784
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	877,698

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				719,598
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			0	
b Total for prior years: 20___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2019:				
a From 2014. 194,701				
b From 2015. 30,253				
c From 2016.				
d From 2017.				
e From 2018.				
f **Total** of lines 3a through e.	224,954			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ $ 945,482				
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.				719,598
e Remaining amount distributed out of corpus	225,884			
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	450,838			
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 instructions			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 (see instructions) . . .	194,701			
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a	256,137			
10 Analysis of line 9:				
a Excess from 2015. . . . 30,253				
b Excess from 2016. . . .				
c Excess from 2017. . . .				
d Excess from 2018. . . .				
e Excess from 2019. . . . 225,884				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling. . . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2019	**(b)** 2018	**(c)** 2017	**(d)** 2016	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter: **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter: **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

STANLEY I WESTREICH

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.

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ▶ ☑ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a The name, address, and telephone number or email address of the person to whom applications should be addressed:

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

c Any submission deadlines:

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

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				939,125
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	28,942	
4 Dividends and interest from securities. . . .			14	234,600	
5 Net rental income or (loss) from real estate:					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.			14	691	
8 Gain or (loss) from sales of assets other than inventory			18	6,681,227	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e). .		0		6,945,460	0

13 Total. Add line 12, columns (b), (d), and (e). **13** 6,945,460

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash.	**1a(1)**		**No**
	(2) Other assets.	**1a(2)**		**No**
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization.	**1b(1)**		**No**
	(2) Purchases of assets from a noncharitable exempt organization.	**1b(2)**		**No**
	(3) Rental of facilities, equipment, or other assets.	**1b(3)**		**No**
	(4) Reimbursement arrangements.	**1b(4)**		**No**
	(5) Loans or loan guarantees.	**1b(5)**		**No**
	(6) Performance of services or membership or fundraising solicitations.	**1b(6)**		**No**
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	**1c**		**No**

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line No.	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☑ No

b If "Yes," complete the following schedule.

(a) Name of organization	**(b)** Type of organization	**(c)** Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

******	2020-11-12	******
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr.) ☑ **Yes** ☐ **No**

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
HOWARD HANDWERKER		2020-11-12		P00746288
Firm's name ▶ FRIEDMAN LLP				Firm's EIN ▶13-1610809
Firm's address ▶ ONE LIBERTY PLAZA 165 BROADWAY 21ST FL NEW YORK, NY 10006				Phone no. (212) 842-7000

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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.)
1,083 SHS HASBRO INC	P	2019-01-02	2019-04-01
1,092 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-04-01	2019-06-19
1,093 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-04-01	2019-07-03
1,097 SHS VERIZON COMMUNICATIONS	P	2019-01-02	2019-04-01
1,099 SHS HERSHEY COMPANY	P	2019-07-01	2019-08-06
1,123 SHS PEPSICO INC	P	2019-07-01	2019-08-06
1,240 SHS DOVER CORP	P	2019-01-02	2019-04-01
1,265 SHS HELMERICH & PAYNE INC	P	2019-01-02	2019-04-01
1,288 SHS WALGREENS BOOTS ALLIANCE INC	P	2019-01-02	2019-04-01
1,318 SHS PHILIP MORRIS INTL INC	P	2019-01-02	2019-04-01

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
92,783		86,625	6,158
99,971		99,852	119
99,975		99,951	24
64,814		61,461	3,353
163,872		147,548	16,324
140,253		148,097	-7,844
118,982		88,357	30,625
72,755		60,790	11,965
81,767		87,642	-5,875
116,239		88,722	27,517

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
(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	
			6,158
			119
			24
			3,353
			16,324
			-7,844
			30,625
			11,965
			-5,875
			27,517

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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.)
1,343 SHS CVS HEALTH CORPORATION	P	2019-01-02	2019-04-01
1,388 SHS EXTRA SPACE STORAGE INC	P	2019-07-01	2019-08-06
1,587 UNITS CARNIVAL CORP UNITS	P	2019-04-01	2019-07-01
1,626 SHS DUKE ENERGY CORP	P	2019-04-01	2019-07-01
1,637 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-01-07	2019-02-26
1,640 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-01-07	2019-03-11
1,642 SHS CENTURYLINK INC	P	2019-01-02	2019-04-01
1,673 SHS AMERICAN ELECTRIC POWER CO INC	P	2019-07-01	2019-08-06
1,680 SHS CONSOLIDATED EDISON INC	P	2019-07-01	2019-08-06
1,691 SHS PUBLIC SERVICE ENTERPRISE GRP	P	2019-01-02	2019-04-01

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
72,769		88,081	-15,312
157,972		146,732	11,240
73,454		82,832	-9,378
143,094		145,176	-2,082
149,914		149,769	145
150,025		150,044	-19
20,304		25,359	-5,055
147,214		147,448	-234
143,512		146,772	-3,260
98,983		85,960	13,023

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
(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	
			-15,312
			11,240
			-9,378
			-2,082
			145
			-19
			-5,055
			-234
			-3,260
			13,023

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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.)
1,782 SHS ALTRIA GROUP INC	P	2019-01-02	2019-04-01
1,790 SHS PAYCHEX INC	P	2019-07-01	2019-08-06
1,824 SHS TYSON FOODS INC	P	2019-07-01	2019-08-06
1,856 SHS SOUTHERN CO	P	2019-07-01	2019-08-06
1,858 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-04-01	2019-06-06
1,865 SHS VENTAS INC	P	2019-04-01	2019-07-01
1,886 SHS WELLTOWER INC	P	2019-04-01	2019-07-01
1,888 SHS NORDSTROM INC	P	2019-01-02	2019-04-01
1,925 SHS UNITED TECHNOLOGIES CORP	P	2019-01-02	2019-04-01
1,925 SHS US BANCORP	P	2019-01-02	2019-04-01

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
102,866		87,877	14,989
145,069		149,490	-4,421
154,519		147,678	6,841
103,908		101,790	2,118
169,966		169,906	60
126,642		117,621	9,021
154,151		145,342	8,809
84,763		89,649	-4,886
37,552		30,548	7,004
94,451		89,231	5,220

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
(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	
			14,989
			-4,421
			6,841
			2,118
			60
			9,021
			8,809
			-4,886
			7,004
			5,220

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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.)
1,926 SHS SYSCO CORP	P	2019-07-01	2019-08-06
1,936 SHS QUALCOMM INC	P	2019-07-01	2019-08-06
1,996 SHS COMERICA INC	P	2019-04-01	2019-07-01
10,000 SHS MOTOROLA SOLUTIONS INC	P	2011-01-07	2019-03-18
10,000 SHS MOTOROLA SOLUTIONS INC	P	2011-01-07	2019-03-15
10,000 SHS MOTOROLA SOLUTIONS INC	P	2011-01-07	2019-03-13
10,000 SHS MOTOROLA SOLUTIONS INC	P	2011-01-07	2019-03-14
148 SHS HESS CORPORATION	P	2019-07-01	2019-08-06
18,561 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-04-01	2019-04-30
2,000 SHS MOTOROLA SOLUTIONS INC	P	2011-01-07	2019-03-21

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
129,803		136,137	-6,334
134,581		150,086	-15,505
145,718		151,863	-6,145
1,404,224		168,525	1,235,699
1,409,974		168,525	1,241,449
1,412,937		168,525	1,244,412
1,408,010		168,525	1,239,485
8,768		9,519	-751
1,699,965		1,697,218	2,747
280,289		33,705	246,584

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
(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	
			-6,334
			-15,505
			-6,145
			1,235,699
			1,241,449
			1,244,412
			1,239,485
			-751
			2,747
			246,584

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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.)
2,005 SHS OMNICOM GROUP INC	P	2019-04-01	2019-07-01
2,086 SHS DENTSPLY SIRONA INC	P	2019-07-01	2019-08-06
2,183 SHS TWITTER INC	P	2019-07-01	2019-08-06
2,415 SHS FOOT LOCKER INC	P	2019-04-01	2019-07-01
2,439 SHS SCHLUMBERGER LIMITED	P	2019-01-02	2019-04-01
2,608 SHS ALASKA AIR GROUP INC	P	2019-04-01	2019-07-01
2,814 SHS CAPITAL ONE FINANCIAL CORP	P	1994-11-01	2019-04-03
201 SHS CHIPOTLE MEXICAN GRILL	P	2019-07-01	2019-08-06
219 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-04-01	2019-06-05
273,000 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-01-07	2019-02-12

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
167,507		147,615	19,892
106,627		121,662	-15,035
89,407		78,770	10,637
101,976		147,805	-45,829
109,161		90,738	18,423
166,145		149,498	16,647
240,052		15,007	225,045
157,960		145,810	12,150
20,027		20,025	2
24,980		24,977	3

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
(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	
			19,892
			-15,035
			10,637
			-45,829
			18,423
			16,647
			225,045
			12,150
			2
			3

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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.)
3,122 SHS CAPITAL ONE FINANCIAL CORP	P	1994-11-01	2019-02-12
3,127 SHS CAPITAL ONE FINANCIAL CORP	P	1994-11-01	2019-04-01
3,352 SHS APACHE CORP	P	2019-01-02	2019-04-01
3,414 SHS DR HORTON INC	P	2019-07-01	2019-08-06
3,424 SHS VIACOM INC .59625:1 EXC 12/5/19	P	2019-01-02	2019-04-01
3,438 SHS METLIFE INC	P	2019-04-01	2019-07-01
3,483 SHS COMCAST CORP	P	2019-07-01	2019-08-06
3,945 SHS GENERAL MOTORS CO	P	2019-04-01	2019-07-01
32,448 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-08-06	2019-10-01
336 SHS LOCKHEED MARTIN CORP	P	2019-01-02	2019-04-01

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
250,062		16,650	233,412
263,189		16,676	246,513
117,211		90,880	26,331
156,999		148,926	8,073
98,911		91,599	7,312
173,574		151,726	21,848
145,196		148,766	-3,570
152,858		148,970	3,888
2,967,304		2,968,522	-1,218
102,233		88,956	13,277

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
(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	
			233,412
			246,513
			26,331
			8,073
			7,312
			21,848
			-3,570
			3,888
			-1,218
			13,277

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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.)
35,908 SHS AXSOME THERAPEUTICS INC	P	2019-01-09	2019-11-19
382 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-04-01	2019-10-02
4,119 SHS CONAGRA BRANDS INC	P	2019-01-02	2019-04-01
4,127 SHS IRON MOUNTAIN INC	P	2019-04-01	2019-07-01
4,453 SHS XEROX CORP 1:1 EXC 8/1/19	P	2019-01-02	2019-04-01
4,483 SHS KRAFT HEINZ CO	P	2019-04-01	2019-07-01
4,676 SHS HCP INC N/C 11/5/19	P	2019-04-01	2019-07-01
4,767 SHS CENTERPOINT ENERGY INC	P	2019-04-01	2019-07-01
402 SHS ROPER TECHNOLOGIES INC	P	2019-07-01	2019-08-06
407 SHS APPLE INC	P	2019-07-01	2019-08-06

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
1,069,465		592,214	477,251
34,937		34,930	7
113,799		87,865	25,934
126,771		146,892	-20,121
146,984		89,646	57,338
136,542		145,704	-9,162
147,611		145,284	2,327
135,802		146,354	-10,552
139,404		150,182	-10,778
79,946		82,038	-2,092

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
(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	
			477,251
			7
			25,934
			-20,121
			57,338
			-9,162
			2,327
			-10,552
			-10,778
			-2,092

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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.)
411 SHS KIMBERLY CLARK CORP	P	2019-07-01	2019-08-06
436 SHS CONSTELLATION BRANDS INC	P	2019-07-01	2019-08-06
437 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-01-07	2019-03-25
5,803 SHS FIFTH THIRD BANCORP	P	2019-04-01	2019-07-01
5,949 SHS KROGER CO	P	2019-04-01	2019-07-01
589 SHS WHIRLPOOL CORP	P	2019-04-01	2019-07-01
6,183 SHS NIELSEN HLDGS PLC	P	2019-04-01	2019-07-01
611 SHS ABBVIE INC	P	2019-04-01	2019-01-01
655 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-04-01	2019-07-16
678 SHS EVEREST RE GROUP	P	2019-04-01	2019-07-01

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
54,922		55,665	-743
82,369		85,502	-3,133
40,013		39,981	32
164,330		152,336	11,994
128,488		145,638	-17,150
85,738		79,210	6,528
138,550		150,130	-11,580
44,839		49,364	-4,525
59,944		59,893	51
169,815		147,357	22,458

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(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	
			-743
			-3,133
			32
			11,994
			-17,150
			6,528
			-11,580
			-4,525
			51
			22,458

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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.)
682 SHS JOHNSON & JOHNSON	P	2019-01-02	2019-04-01
7,523 SHS SPDR SERIES TRUST SPDR BLOOMBERG ETF	P	2019-04-01	2019-10-02
720 SHS AMERICAN TOWER CORP	P	2019-07-01	2019-08-06
762 SHS LIMITED BRANDS INC	P	2019-01-02	2019-04-01
796 SHS CARMAX INC	P	2019-07-01	2019-08-06
797 SHS ACCENTURE PLC	P	2019-07-01	2019-08-06
862 SHS CAMPBELL SOUP CO	P	2019-01-02	2019-04-01
869 SHS CARDINAL HEALTH INC	P	2019-01-02	2019-04-01
9,541 SHS NEWELL BRANDS INC	P	2019-04-01	2019-07-01
940 SHS WYNN RESORTS LTD	P	2019-04-01	2019-07-01

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
94,776		87,132	7,644
687,966		687,903	63
154,099		145,663	8,436
20,727		20,055	672
66,832		69,386	-2,554
148,766		148,942	-176
32,619		27,815	4,804
42,677		39,173	3,504
145,203		147,320	-2,117
123,365		121,587	1,778

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(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	
			7,644
			63
			8,436
			672
			-2,554
			-176
			4,804
			3,504
			-2,117
			1,778

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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.)
941 SHS SMUCKER (JM) CO	P	2019-01-02	2019-04-01
950 SHS MCCORMICK & COMPANY INC	P	2019-07-01	2019-08-06
ALETHEA BIOTECH FUND	P		2019-12-31
ALETHEA GLOBAL EQUITY FUND LP	P		2019-12-31

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
108,893		88,348	20,545
147,249		147,922	-673
87,770			87,770
		58,184	-58,184

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
(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	
			20,545
			-673
			87,770
			-58,184

Form 990PF Part XV Line 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*				
ADOPT A FAMILY ASSOCIATION 5753 CHEVROLET BLVD PARMA, OH 44130	NONE	PUBLIC CHARITY	SUPPORT FOR FAMILIES IN CRISIS	1,500
ALLIANCE FOR NATURAL HEALTH 3525 PIEDMONT ROAD NE 310 ATLANTA, GA 30305	NONE	PUBLIC CHARITY	HEALTH	25,000
AMERICAN CITIZENS FOR HEALTH CHOICE 6534 FLYING CLOUD DRIVE SUITE 1200 EDEN PRAIRIE, MN 55344	NONE	PUBLIC CHARITY	HEALTH	20,000
Total . . . . ▶ **3a**				939,125

Form 990PF Part XV Line 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*				
AMERICAN COLLEGE OF NUTRITION 211 WEST CHICAGO AVENUE SUITE 217 HINSDALE, IL 60521	NONE	PUBLIC CHARITY	HEALTH	10,000
AMERICAN NUTRITION ASSOCIATION PO BOX 262 WESTERN SPRINGS, IL 60558	NONE	PUBLIC CHARITY	PROMOTE OPTIMAL HEALTH THROUGH NUTRITION AND WELLNESS EDUCATION.	20,000
BASTYR UNIVERSITY 4106 SORRENTO VALLEY BLVD SAN DIEGO, CA 92121	NONE	PUBLIC CHARITY	EDUCATION	50,000
Total . . . . ▶ **3a**				939,125

Form 990PF Part XV Line 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*				
CALIFORNIA STATE UNIVERSITY SAN MARCOS 333 S TWIN OAKS VALLEY ROAD SAN MARCOS, CA 92096	NONE	PUBLIC CHARITY	EDUCATION	50,000
CELLULAR PHONE TASK FORCE PO BOX 6216 SANTA FE, NM 87502	NONE	PUBLIC CHARITY	HUMAN CARE SERVICES	10,000
ENVIRONMENTAL HEALTH SYMPOSIUM PO BOX 6364 BROOMFIELD, CO 80021	NONE	PUBLIC CHARITY	ENVIRONMENT	15,000
Total . . . . ▶ **3a**				939,125

Form 990PF Part XV Line 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*				
EPIDEMIC ANSWERS 360 BLOOMFIELD AVENUE SUITE 301 WINDSOR, CT 060952700	NONE	PUBLIC CHARITY	HEALTH	35,000
HEALTH CHOICE 6533 FLYING CLOUD DRIVE SUITE 1200 EDEN PRAIRIE, MN 55344	NONE	PUBLIC CHARITY	HEALTH	15,000
HEALTH RESEARCH INSTITUTE - HRI LABS 200 W BROSDWAY AVE PO BOX 370 FAIRFIELD, IA 52556	NONE	PUBLIC CHARITY	HEALTH	31,500
Total . . . . ▶ **3a**				939,125

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
JEWISH FAMILY SERVICES 8804 BALBOA AVENUE SAN DIEGO, CA 92123	NONE	PUBLIC CHARITY	HUMAN CARE SERVICES	5,000
KITCHENS FOR GOOD 404 EUCLID AVE STE 101 SAN DIEGO, CA 92114	NONE	PUBLIC CHARITY	HEALTH LIFESTYLE	25,000
LIGHTBRIDGE HOSPICE 6155 CONERSTONE CT E 220 SAN DIEGO, CA 92121	NONE	PUBLIC CHARITY	HUMAN CARE SERVICE	20,000
Total . . . . ▶ **3a**				939,125

Form 990PF Part XV Line 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*				
MOMS ACROSS AMERICA 24000 ALICIA PARKWAY 17-236 MISSION VIEJO, CA 92691	NONE	PUBLIC CHARITY	HEALTH	100,000
NATIONAL INSTITUTE FOR SCIENCE NIS BOX 246 ALABAMA STATE UNIVERSIT MONTGOMERY, AL 36101	NONE	PUBLIC CHARITY	ENVIRONMENT	104,625
NATIONAL VACCINE INFORMATION CENTER 21525 RIDGETOP CIRCLE STERLING, VA 20166	NONE	PUBLIC CHARITY	HEALTH	25,000
Total . . . . ▶ **3a**				939,125

Form 990PF Part XV Line 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*				
NOAH NATIONAL ORGANIZATION FOR ARTS IN HEALTH 3157 THIRD AVENUE SAN DIEGO, CA 92103	NONE	PUBLIC CHARITY	TO ADVANCE AND SERVE THE FIELD OF ARTS IN HEALTH	25,000
PUTENTI-BOGOTA FAMILY FOUNDATION 441 W BAGLEY ROAD 343 BEREA, OH 44017	NONE	PUBLIC CHARITY	HUMAN CARE SERVICE	100,000
RACHEL'S NETWORK 1200 18TG ST NW 910 WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	HEALTH	7,500
Total . . . . ▶ **3a**				939,125

Form 990PF Part XV Line 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*				
SAMUEL LAWRENCE FOUNDATION PO BOX F DEL MAR, CA 92014	NONE	PUBLIC CHARITY	ENVIRONMENT	1,500
SOCIAL GOOD FUNDPO BOX 5473 RICHMOND, CA 94805	NONE	PUBLIC CHARITY	HUMAN CARE SERVICES	5,000
SOUTHERN CALIFORNIA UNIVERSITY HEALTH SCIENCES 9500 GILMAN DRIVE LA JOLLA, CA 920930012	NONE	PUBLIC CHARITY	HEALTH	15,000
Total . . . . ▶ **3a**				939,125

Form 990PF Part XV Line 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*				
US RIGHT TO KNOW 4096 PIEDMONT AVENUE OAKLAND, CA 946115221	NONE	PUBLIC CHARITY	HEALTH	10,000
UCLA ARTS AND HEALING INITIATIVE 2336 SANTA MONICA BLVD SANTA MONICA, CA 90404	NONE	PUBLIC CHARITY	EDUCATION	10,000
UCSD9500 GILMAN DRIVE MC 0940 LA JOLLA, CA 920930940	NONE	PUBLIC CHARITY	EDUCATION	110,000
Total . . . . ▶ **3a**				939,125

Form 990PF Part XV Line 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*				
URBAN VOICES 420 S SAN PEDRO STREET SUITE 423 LOS ANGELES, CA 90013	NONE	PUBLIC CHARITY	HUMAN CARE SERVICES	7,500
USD ENVIRONMENTAL HUB 5998 ALCALA PARK SAN DIEGO, CA 92110	NONE	PUBLIC CHARITY	ENVIRONMENT	35,000
USD FOR NONPROFIT INSTITUTE 5998 ALCALA PARK SAN DIEGO, CA 92110	NONE	PUBLIC CHARITY	EDUCATION	15,000
Total . . . . ▶ **3a**				939,125

Form 990PF Part XV Line 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*				
WORDS ALIVE 5111 SANTA FE STREET SUITE 219 SAN DIEGO, CA 92109	NONE	PUBLIC CHARITY	EDUCATION	35,000
Total . . . . ▶ **3a**				939,125

TY 2019 Investments Corporate Stock Schedule

Name: WESTREICH FOUNDATION

EIN: 20-3598096

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
RA MEDICAL SYSTEM	200,000	200,000
CAPITAL ONE FINL CORP	135,069	2,606,402
NANOBIOSYM DIAGNOSTIC, INC	1,000,000	1,000,000

TY 2019 Investments - Other Schedule

Name: WESTREICH FOUNDATION

EIN: 20-3598096

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ALETHEA MEDTECH FUND LP	AT COST	611,745	611,745
ALETHEA FULCRUM FUND LP	AT COST	1,973,050	1,973,050
OTHER INVESTMENTS	AT COST	7,515,669	11,366,529
ALETHEA BIOTECH FUND LP	AT COST	226,961	226,961

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491318009160

TY 2019 Other Decreases Schedule

Name: WESTREICH FOUNDATION

EIN: 20-3598096

Description	Amount
EXCESS OF FAIR MARKET VALUE OVER DONATED STOCK TAX BASIS	4,158,744

TY 2019 Other Expenses Schedule

Name: WESTREICH FOUNDATION

EIN: 20-3598096

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	104,918	104,918		0
THROUGH ALETHEA GLOBAL EQUITY FUND LP-PORTFOLIO & OTHER DEDUCTIONS	18,588	18,588		0
THROUGH BIOTECH FUND LP-PORTFOLIO & OTHER DEDUCTIONS	22,216	6,707		0
THROUGH ALETHEA BIOTECH FUND LP-ORDINARY INCOME/(LOSS)	19,632	0		0
THROUGH ALETHEA MEDTECH FUND LP-PORTFOLIO & OTHER DEDUCTIONS	6,545	3,437		0
THROUGH ALETHEA MEDTECH FUND LP-ORDINARY INCOME/(LOSS)	93,238	0		0
CONSULTING FEES	6,357	0		6,357
THROUGH ALETHEA FULCRUM FUND LP - PORTFOLIO & OTHER DEDUCTIONS	33,445	33,445		0

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491318009160

TY 2019 Other Income Schedule

Name: WESTREICH FOUNDATION

EIN: 20-3598096

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
THROUGH ALETHEA GLOBAL EQUITY FUND LP	691	691	691

TY 2019 Other Liabilities Schedule

Name: WESTREICH FOUNDATION

EIN: 20-3598096

Description	Beginning of Year - Book Value	End of Year - Book Value
ALETHEA BIOTECH FUND LP	92,855	0

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491318009160

TY 2019 Taxes Schedule

Name: WESTREICH FOUNDATION

EIN: 20-3598096

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	2,524	0		0

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

Schedule of Contributors

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

OMB No. 1545-0047

2019

Name of the organization	Employer identification number
WESTREICH FOUNDATION	20-3598096

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 other 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 $33\frac{1}{3}$% 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 990PF, 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
WESTREICH FOUNDATION

Employer identification number
20-3598096

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
1	STANLEY WESTREICH PO BOX 3601 RANCHO SANTA FE, CA 92067	$ 4,882,036	☐ Person ☐ Payroll ☑ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization	Employer identification number
WESTREICH FOUNDATION	20-3598096

Part II **Noncash Property**

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	42,919 SHS MOTOROLA STOCK	$ 4,882,036	2019-01-28

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

Name of organization
WESTREICH FOUNDATION

Employer identification number
20-3598096

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 information once. See instructions.) ▶ $**

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
-	

(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
-	

(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
-	

(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
-	