

efile GRAPHIC print - DO NOT PROCESS

As Filed Data -

DLN: 93491321027230

Form 990-PF

Department of the Treasury  
Internal Revenue Service

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

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

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  
GERTRUDE AND MURRAY BENNETT  
FAMILY FOUNDATION

Number and street (or P.O. box number if mail is not delivered to street address)  
660 US HWY ONE - 3RD FLOOR

City or town, state or province, country, and ZIP or foreign postal code  
N PALM BEACH, FL 33408

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) \$ 6,959,794

J Accounting method:

☒ Cash

☐ Accrual

☐ Other (specify)

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

A Employer identification number  
20-5716045

B Telephone number (see instructions)  
(561) 627-8100

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

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)
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	335,992	335,992	335,992	
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	99,045			
b Gross sales price for all assets on line 6a 5,777,107				
7 Capital gain net income (from Part IV, line 2)		99,045		
8 Net short-term capital gain			40,111	
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)				
12 Total. Add lines 1 through 11	435,037	435,037	376,103	
13 Compensation of officers, directors, trustees, etc.				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)	10,000	10,000		
b Accounting fees (attach schedule)	3,630	3,000	630	
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see instructions)	1,907	1,907		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)	53,447	53,447		
24 Total operating and administrative expenses. Add lines 13 through 23	68,984	68,354	630	0
25 Contributions, gifts, grants paid	554,688			554,688
26 Total expenses and disbursements. Add lines 24 and 25	623,672	68,354	630	554,688
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-188,635			
b Net investment income (if negative, enter -0-)		366,683		
c Adjusted net income (if negative, enter -0-)			375,473	

For Paperwork Reduction Act Notice, see instructions.

Cat. No. 11289X

Form 990-PF (2019)

<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .			
	<b>2</b> Savings and temporary cash investments . . . . .	885,101	1,090,610	1,090,610
	<b>3</b> Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>4</b> Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .			
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	5,925,151	5,531,007	5,869,184
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .			
	<b>11</b> Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .			
	<b>14</b> Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)				
<b>16</b> <b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	6,810,252	6,621,617	6,959,794	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .			
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23</b> <b>Total liabilities</b> (add lines 17 through 22) . . . . .		0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .			
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .	7,187,293	7,187,293	
	<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund			
	<b>28</b> Retained earnings, accumulated income, endowment, or other funds	-377,041	-565,676	
	<b>29</b> <b>Total net assets or fund balances</b> (see instructions) . . . . .	6,810,252	6,621,617	
<b>30</b> <b>Total liabilities and net assets/fund balances</b> (see instructions) .	6,810,252	6,621,617		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	6,810,252
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-188,635
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	6,621,617
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	<b>6</b>	6,621,617

**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.)
<b>1a</b> See Additional Data Table			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

(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)
<b>a</b> See Additional Data Table			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus 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	
<b>a</b> See Additional Data Table			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

<b>2</b> Capital gain net income or (net capital loss) <span style="float: right;">{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }</span>	<b>2</b>	99,045
<b>3</b> 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 <span style="float: right;">}</span>	<b>3</b>	40,111

**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	534,433	6,941,344	0.07699
2017	545,167	7,384,762	0.07382
2016	507,397	7,219,998	0.07028
2015	495,000	7,527,799	0.06576
2014	509,000	8,197,280	0.06209

  

<b>2</b> Total of line 1, column (d)	<b>2</b>	0.348943
<b>3</b> Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	<b>3</b>	0.069789
<b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	<b>4</b>	6,671,298
<b>5</b> Multiply line 4 by line 3	<b>5</b>	465,583
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	3,667
<b>7</b> Add lines 5 and 6	<b>7</b>	469,250
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	554,688

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)**

<b>1a</b>	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>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .	<b>1</b>	3,667
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	
<b>3</b>	Add lines 1 and 2. . . . .	<b>3</b>	3,667
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	<b>5</b>	3,667
<b>6</b>	Credits/Payments:		
<b>a</b>	2019 estimated tax payments and 2018 overpayment credited to 2019	<b>6a</b>	11,417
<b>b</b>	Exempt foreign organizations—tax withheld at source . . . . .	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868) . . . . .	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld . . . . .	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d. . . . .	<b>7</b>	11,417
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . . ▶	<b>9</b>	
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . . ▶	<b>10</b>	7,750
<b>11</b>	Enter the amount of line 10 to be: <b>Credited to 2020 estimated tax</b> ▶ 7,750 <b>Refunded</b> ▶	<b>11</b>	

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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? . . . . .		No
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). . . . . <i>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.</i>		No
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .		No
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: <b>(1)</b> On the foundation. ▶ \$ _____ <b>(2)</b> On foundation managers. ▶ \$ _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <i>If "Yes," attach a detailed description of the activities.</i>		No
<b>3</b> 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? <i>If "Yes," attach a conformed copy of the changes</i> . . . . .		No
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .		No
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T.</i>		No
<b>6</b> 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? . . . . .	Yes	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i> . . . . .	Yes	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ FL _____		
<b>b</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? <i>If "No," attach explanation .</i>	Yes	
<b>9</b> 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. <i>If "Yes," complete Part XIV</i> . . . . .		No
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i> . . . . .		No

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

<b>11</b>	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. . . . .	<b>11</b>		<b>No</b>
<b>12</b>	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 . . . . .	<b>12</b>		<b>No</b>
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶(none)	<b>13</b>	<b>Yes</b>	
<b>14</b>	The books are in care of ▶ELLEN LAIRD REGNERY Telephone no. ▶(561) 627-8100			

Located at ▶660 US HWY ONE - 3RD FL N PALM BEACH FL ZIP+4 ▶33408

<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —check here . . . . . ▶ <input type="checkbox"/>			
	and enter the amount of tax-exempt interest received or accrued during the year . . . . . ▶ <b>15</b>			
<b>16</b>	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? . . . . .	<b>16</b>	<b>Yes</b>	<b>No</b>
	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.**

		<b>Yes</b>	<b>No</b>
<b>1a</b>	During the year did the foundation (either directly or indirectly):		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" 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? ( <b>Exception.</b> 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>b</b>	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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 . . . . . <input type="checkbox"/>	<b>1b</b>	<b>No</b>
<b>c</b>	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? . . . . . <input type="checkbox"/>	<b>1c</b>	<b>No</b>
<b>2</b>	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)):		
<b>a</b>	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? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
<b>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions.) . . . . . <input type="checkbox"/>	<b>2b</b>	
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
<b>3a</b>	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>b</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.) . . . . . <input type="checkbox"/>	<b>3b</b>	
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>	<b>No</b>
<b>b</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?	<b>4b</b>	<b>No</b>

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

<b>5a</b>	During the year did the foundation pay or incur any amount to:		<b>Yes</b>	<b>No</b>
(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>b</b>	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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 . . . . .		<b>5b</b>	
	Organizations relying on a current notice regarding disaster assistance check here. . . . .	<input type="checkbox"/>		
<b>c</b>	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? . . . . . If "Yes," attach the statement required by Regulations section 53.4945–5(d).	<input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>6a</b>	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>6b</b>	<b>No</b>
<b>b</b>	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . . If "Yes" to 6b, file Form 8870.			
<b>7a</b>	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>7b</b>	
<b>b</b>	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . .			
<b>8</b>	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? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

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

<b>1 List all officers, directors, trustees, foundation managers and their compensation. See instructions</b>				
<b>(a)</b> Name and address	<b>(b)</b> Title, and average hours per week devoted to position	<b>(c)</b> Compensation (If not paid, enter -0-)	<b>(d)</b> Contributions to employee benefit plans and deferred compensation	<b>(e)</b> Expense account, other allowances
DAVID HENRY FRANKEL 444 12TH ST APT 4-A BROOKLYN, NY 11215	Director 1.00	0		
JOEL I BENNETT 4246 BEULAH DRIVE LA CANADA, CA 91011	President/Treas 10.00	0		
WENDY M BENNETT 4246 BEULAH DRIVE LA CANADA, CA 91011	Vice Pres/Secty 1.00	0		
PAMELA H BENNETT 910 5TH AVE APT 7B NEW YORK, NY 10021	Vice President 1.00	0		
<b>2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."</b>				
<b>(a)</b> Name and address of each employee paid more than \$50,000	<b>(b)</b> Title, and average hours per week devoted to position	<b>(c)</b> Compensation	<b>(d)</b> Contributions to employee benefit plans and deferred compensation	<b>(e)</b> Expense account, other allowances
NONE				
<b>Total</b> number of other employees paid over \$50,000. . . . .				

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

**3 Five highest-paid independent contractors for professional services (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. . . . . ►

**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
<b>1</b> UNSOLICITED CONTRIBUTIONS TO PUBLIC CHARITIES- SEE PART XV OF THIS RETURN	554,688
<b>2</b>	
<b>3</b>	
<b>4</b>	

**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
<b>1</b>	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	

**Total.** Add lines 1 through 3 . . . . . ►

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	5,776,471
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	996,420
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	6,772,891
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets. . . . .	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	6,772,891
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	101,593
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	6,671,298
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	333,565

**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.)

<b>1</b>	Minimum investment return from Part X, line 6. . . . .	<b>1</b>	333,565
<b>2a</b>	Tax on investment income for 2019 from Part VI, line 5. . . . .	<b>2a</b>	3,667
<b>b</b>	Income tax for 2019. (This does not include the tax from Part VI.). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	3,667
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	329,898
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	329,898
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . . . .	<b>7</b>	329,898

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26. . . . .	<b>1a</b>	554,688
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	554,688
<b>5</b>	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. . . . .	<b>5</b>	3,667
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	551,021

**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
<b>1</b> Distributable amount for 2019 from Part XI, line 7				329,898
<b>2</b> Undistributed income, if any, as of the end of 2019:				
<b>a</b> Enter amount for 2018 only. . . . .				
<b>b</b> Total for prior years: 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2019:				
<b>a</b> From 2014. . . . . 107,669				
<b>b</b> From 2015. . . . . 122,448				
<b>c</b> From 2016. . . . . 153,974				
<b>d</b> From 2017. . . . . 184,031				
<b>e</b> From 2018. . . . . 195,154				
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	763,276			
<b>4</b> Qualifying distributions for 2019 from Part XII, line 4: ► \$ 554,688				
<b>a</b> Applied to 2018, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2019 distributable amount. . . . .				329,898
<b>e</b> Remaining amount distributed out of corpus	224,790			
<b>5</b> Excess distributions carryover applied to 2019. (If an amount appears in column (d), the same amount must be shown in column (a).)				
<b>6</b> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	988,066			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b. . . . .				
<b>c</b> 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. . . . .				
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions. . . . .				
<b>e</b> Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions. . . . .				
<b>f</b> Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020. . . . .				0
<b>7</b> 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). . . . .				
<b>8</b> Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions). . . . .	107,669			
<b>9</b> <b>Excess distributions carryover to 2020.</b> Subtract lines 7 and 8 from line 6a. . . . .	880,397			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2015. . . . . 122,448				
<b>b</b> Excess from 2016. . . . . 153,974				
<b>c</b> Excess from 2017. . . . . 184,031				
<b>d</b> Excess from 2018. . . . . 195,154				
<b>e</b> Excess from 2019. . . . . 224,790				

**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)

**2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .

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

**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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total</b> . . . . .			<b>3a</b>	554,688
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> . . . . .			<b>3b</b>	

Enter gross amounts unless otherwise indicated.

## 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.)

Form **990-PF** (2019)

## Part XVII

- |   |   |    |  |    |
|---|---|----|--|----|
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees. . . . .   | 1c |  | No |
| d | <p>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.</p> |    |  |    |

[illegible]

- 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**

\*\*\*\*\*

Title

(see instr.) ☒ Yes ☐ No

**Paid  
Preparer  
Use Only**

<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN  P00130337
	Sheldon M Snow CPA				
	Firm's name ▶ ZIGMOND SNOW & LANG				Firm's EIN ▶ 95-4298574
	Firm's address ▶ 9301 OAKDALE AVE SUITE 375 CHATSORTH, CA 91311				Phone no. (818) 789-7850

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

List and describe the kind(s) of property sold (e.g., real estate, (a) 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.)
TD AMERI #6173 SHORT-TERM SALES - COVERED	P	2018-12-31	2019-10-31
TD AMERI #6173 LONG-TERM SALES - COVERED	P	2018-02-15	2019-07-17
5,000 SHS BROOKFIELD PROP PARTNERS LP	P	2018-12-17	2019-04-17
2,500 SHS BROOKFIELD PROP PARTNERS LP	P	2018-03-28	2019-04-15
TD AMERI #6173 SHORT-TERM SALES - NONCOVERED	P	2018-11-07	2019-07-11
FIDELITY #2663 SHORT-TERM SALES - COVERED	P	2019-02-25	2019-07-18
FIDELITY #2663 SHORT-TERM SALES - NONCOVERED	P	2018-10-01	2019-08-23
FIDELITY #2663 LONG-TERM SALES - COVERED	P	2012-05-18	2019-12-20
FIDELITY #2663 LONG-TERM SALES - NONCOVERED	P	2016-11-02	2019-08-23
SCHWAB #9003 SHORT-TERM SALES - COVERED	P	2018-12-28	2019-12-20

**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)
1,391,146		1,376,443	14,703
69,788		75,772	-5,984
104,327		85,197	19,130
51,934		44,438	7,496
935,000		935,000	
1,048,505		1,067,931	-19,426
24,954		20,936	4,018
1,115,535		1,150,454	-34,919
709,296		613,879	95,417
21,438		18,322	3,116

**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	
			14,703
			-5,984
			19,130
			7,496
			-19,426
			4,018
			-34,919
			95,417
			3,116

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

List and describe the kind(s) of property sold (e.g., real estate, <b>(a)</b> 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo., day, yr.)	<b>(d)</b> Date sold (mo., day, yr.)
SCHWAB #9003 SHORT-TERM SALES - NONCOVERED	P	2018-03-15	2019-03-13
SCHWAB #9003 LONG-TERM SALES - NONCOVERED	P	2015-12-14	2019-12-20
PARTNERSHIP K-1 SHORT-TERM CAPITAL GAINS	P	2019-01-01	2019-12-31
PARTNERSHIP K-1 LONG-TERM CAPITAL GAINS	P	2018-01-01	2019-12-31

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

<b>(e)</b> Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	<b>(g)</b> Cost or other basis plus expense of sale	<b>(h)</b> Gain or (loss) (e) plus (f) minus (g)
101,630		83,120	18,510
203,058		206,570	-3,512
60			60
436			436

**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			<b>(l)</b> Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
<b>(i)</b> F.M.V. as of 12/31/69	<b>(j)</b> Adjusted basis as of 12/31/69	<b>(k)</b> Excess of col. (i) over col. (j), if any	
			18,510
			-3,512
			60
			436

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
FOODBANK OF SOUTHERN CALIFORNIA 1444 SAN FRANCISCO AVE LONG BEACH, CA 90813	N/A	PUBLIC	GENERAL FUND	15,000
COMMUNITIES IN SCHOOLS 2000 AVENUE OF THE STARS LOS ANGELES, CA 90067	N/A	PUBLIC	GENERAL FUND - BASIC NEEDS	5,000
MAZON 10495 SANTA MONICA BL STE100 LOS ANGELES, CA 90025	N/A	PUBLIC	HUNGER RELIEF	10,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
LA CANADA FLINTRIDGE EDUCATIONAL FO 4490 CORNISHON AV 211 LA CANADA, CA 91011	N/A	PUBLIC	GENERAL FUND	25,000
UNIVERSITY OF MICHIGAN LAW SCHOOL F 8000 WOLVERINE TOWER ANN ARBOR, MI 48109	N/A	PUBLIC	STUDENT SCHOLARSHIPS	35,000
COLUMBIA UNIVERSITY622 W 113TH NEW YORK, NY 10025	N/A	PUBLIC	GENERAL FUND	25,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
NATIONAL MS SOCIETY 2440 S SEPULVEDA BLVD SUITE 115 LOS ANGELES, CA 90064	N/A	PUBLIC	MEDICAL RESEARCH	25,000
CCNY - BARUCH COLLEGE 1 BERNARD BARUCH WAY BOX A-1603 NEW YORK, NY 10010	N/A	PUBLIC	STUDENT ASSISTANCE	10,000
BUILD A SCHOOL IN AFRICA 83 GROTON STREET PEPPERELL, MA 01463	N/A	PUBLIC	SCHOOL CONSTRUCTION - MALI	5,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CITY OF HOPE1500 EAST DUARTE ROAD DUARTE, CA 91010	N/A	PUBLIC	PANCREATIC CANCER RESEARCH	5,000
CITYMEALS ON WHEELS 355 LEXINGTON AVE 3 NEW YORK, NY 10017	N/A	PUBLIC	GENERAL FUND	5,000
COMMON CAUSE EDUCATION FUND 1133 19TH STREET NW 9TH FLOOR WASHINGTON, DC 20036	N/A	PUBLIC	EDUCATION	5,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
HADASSAH40 WALL ST NEW YORK, NY 10005	N/A	PUBLIC	HOUSING & FOOD PROJECTS	10,000
PEF ISRAEL ENDOWMENT FUNDS 630 3RD AV FL 15TH NEW YORK, NY 10017	N/A	PUBLIC	WOMAN TO WOMAN PROJECT \$5,000; BEIT BERL COLLEGE \$2,500.	5,000
JEWISH COMMUNITY CENTER IN MANHATTA 334 AMSTERDAM AVE NEW YORK, NY 10023	N/A	PUBLIC	LITERACY	5,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
STUDENT DRIVEN SOLUTIONS 200 EAST 69TH ST 2P NEW YORK, NY 10022	N/A	PUBLIC	FINANCIAL LITERACY & SKILLS - GIRLS IN AFRICA	1,000
MENDING KIDS INTERNATIONAL PO BOX 1007 SANTA CLARITA, CA 91386	N/A	PUBLIC	GENERAL FUND	5,000
METROPOLITAN MUSEUM OF ART 1000 5TH AVENUE NEW YORK, NY 10028	N/A	PUBLIC	GENERAL FUND	5,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
NATURAL RESOURCES DEFENSE COUNCIL 40 WEST 20TH STREET NEW YORK, NY 10011	N/A	PUBLIC	BEARS EARS & GRAND ESCALANTE DEFENSE	10,000
NEW YORK GLAUCOMA RESEARCH INSTITUT 310 E 14TH STREET NEW YORK, NY 10003	N/A	PUBLIC	MEDICAL RESEARCH	25,000
ORT AMERICA 75 MAIDEN LANE 10TH FLOOR NEW YORK, NY 10038	N/A	PUBLIC	STAR PROGRAM	10,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
SISTER SCHOOLS INCPO BOX 99492 SEATTLE, WA 98139	N/A	PUBLIC	GENERAL FUND	1,000
UNION STATION HOMELESS SERVICES 825 EAST ORANGE GROVE BLVD PASADENA, CA 91104	N/A	PUBLIC	HOUSING & NUTRITION	5,000
VISTA DEL MAR3200 MOTOR AVENUE LOS ANGELES, CA 90034	N/A	PUBLIC	WISH LIST ITEMS	5,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
AMERICAN JEWISH WORLD SERVICE 45 WEST 36TH STREET NEW YORK, NY 10018	N/A	PUBLIC	FOOD, CLOTHING, SHELTER	5,000
CARNEGIE MELLON UNIVERSITY 5000 FORBES AVENUE PITTSBURGH, PA 15213	N/A	PUBLIC	ART FUND	5,000
CENTRAL PARK CONSERVANCY 14 E 60TH STREET NEW YORK, NY 10022	N/A	PUBLIC	GENERAL FUND	7,500
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CHARITY GLOBAL INC 200 VARICK STREET SUITE 201 NEW YORK, NY 10014	N/A	PUBLIC	GENERAL FUND	5,000
FOOTHILL UNITY CENTER 415 W CHESTNUT AVENUE MONROVIA, CA 91016	N/A	PUBLIC	FOOD PANTRY	7,500
JEWISH FAMILY SERVICE OF LA - SOVA 16439 VANOWEN STREET VAN NUYS, CA 91406	N/A	PUBLIC	FOOD PANTRY	5,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
UNIVERSITY OF SOUTHERN CALIFORNIA UNIVERSITY PARK CAMPUS LOS ANGELES, CA 90089	N/A	PUBLIC	CHILDRENS DENTAL CLINIC	50,000
GLENDALE ADVENTIST HEALTHCARE FOUND 1509 WILSON TERRACE GLENDALE, CA 91206	N/A	PUBLIC	NEONATAL ICU - JAUNDICE METER	7,500
AMERICAN JEWISH JOINT DISTRIBUTION 711 3RD AVENUE 900 NEW YORK, NY 10017	N/A	PUBLIC	MEDICAL SVCS - HODES PROJECT	10,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
CALIFORNIA COMMUNITY FOUNDATION 221 S FIGUEROA STREET SUITE 400 LOS ANGELES, CA 90012	N/A	PUBLIC	ARTS & HOUSING SVCS	5,000
JEWISH VOCATIONAL SERVICE OF LOS AN 6505 WILSHIRE BOULEVARD LOS ANGELES, CA 90048	N/A	PUBLIC	JOB TRAINING & RETRAINING	5,000
ROOM TO READ 111 SUTTER STREET 16TH FLOOR SAN FRANCISCO, CA 94104	N/A	PUBLIC	LITERACY	5,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
THE HUNGER PROJECT 5 UNION SQUARE WEST 7TH FL NEW YORK, NY 10003	N/A	PUBLIC	GENERAL FUND	5,000
UNIVERSITY OF CALIFORNIA SANTA BARB 552 UNIVERSITY ROAD SANTA BARBARA, CA 93106	N/A	PUBLIC	EDUCATION ABROAD PROGRAMS	5,000
JEWISH FAMILY SERVICES GRAMERCY PLA 3580 WILSHIRE BLVD 7TH FLOOR LOS ANGELES, CA 90010	N/A	PUBLIC	SHELTER SERVICES & NUTRITION	5,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
FEEDING AMERICA 35 EAST WACKER DRIVE SUITE 2000 CHICAGO, IL 60601	N/A	PUBLIC	GENERAL FUND	25,000
INTERNATIONAL RESCUE COMMITTEE 625 N MARYLAND AVENUE GLENDALE, CA 91206	N/A	PUBLIC	SYRIAN REFUGEE PROGRAMS	15,000
LAMBDA LEGAL DEFENSE FUND 4221 WILSHIRE BLVD 280 LOS ANGELES, CA 90010	N/A	PUBLIC	LGBTQ ADVOCACY	10,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
PARTNERS IN HEALTH 800 BOYLSTON ST STE 1400 BOSTON, MA 02199	N/A	PUBLIC	HAITI RELIEF PROGRAMS	2,500
UNICEF USA125 MAIDEN LANE NEW YORK, NY 10038	N/A	PUBLIC	WATER, SANITATION & HYGIENE PROGRAMS	10,000
ACLU FOUNDATION 125 BROAD ST FL 18TH NEW YORK, NY 10004	N/A	PUBLIC	LEGAL ADVOCACY	5,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
PAI1300 19TH ST NW STE 200 WASHINGTON, DC 20036	N/A	PUBLIC	GLOBAL REPRODUCTIVE RIGHTS	5,000
PFLAG1828 L ST NW STE 660 WASHINGTON, DC 20036	N/A	PUBLIC	SUPPORT SERVICES	5,000
PLANNED PARENTHOOD FOUNDATION OF AM 123 WILLIAM ST FL 10TH NEW YORK, NY 10038	N/A	PUBLIC	EDUCATIONAL PROGRAMS	5,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
SOUTHERN POVERTY LAW CENTER 400 WASHINGTON AVE MONTGOMERY, AL 36104	N/A	PUBLIC	GENERAL FUND	5,000
UNIVERSITY OF MICHIGAN LSA SCHOLARS 8000 WOLVERINE TOWER ANN ARBOR, MI 48109	N/A	PUBLIC	STUDENT SCHOLARSHIPS	15,000
CITIZENS FOR ETHICS RESPON IN WA 455 MASSACHUSETTS AVE NW WASHINGTON, DC 20001	N/A	PUBLIC	PROMOTE GOVERNMENT ETHICS AND ACCOUNTABILITY	7,500
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
RELIGIOUS ACTION CTR OF REFORM JUDA 2027 MASSACHUSETTS AVE NW WASHINGTON, DC 20036	N/A	PUBLIC	ENVIRONMENTAL ACTION	2,500
LOS ANGELES LGBT CENTER 1625 N SCHRADER BLVD LOS ANGELES, CA 90028	N/A	PUBLIC	Shelter, food & clothing for homeless young people	2,500
MIRACLE FEET 107 CONNER DRIVE SUIOTE 230 CHAPEL HILL, NC 27514	N/A	PUBLIC	HEALTHCARE SUPPORT TO CHILDREN WITH CLUBFOOT	2,500
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
SUNFLOWER COUNTY FREEDOM PROJECT 120 DELTA AVE SUNFLOWER, MS 38778	N/A	PUBLIC	LEADERSHIP PROGRAM IN MISSISSIPPI DELTA	2,500
USC SHOAH FOUNDATION 650 WEST 35TH STREET SUITE 114 LOS ANGELES, CA 90089	N/A	PUBLIC	GENOCIDE RESEARCH	2,500
THREADPO BOX 1584 BALTIMORE, MD 21203	N/A	PUBLIC	SHELTER, FOOD & CLOTHING	2,500
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
LAW CENTER TO PREVENT GUN VIOLENCE 268 BUSH ST 555 SAN FRANCISCO, CA 94104	N/A	PUBLIC	UNRESTRICTED	2,500
UNION STATION HOMELESS SERVICES 825 E ORANGE GROVE BLVD PASADENA, CA 91104	N/A	PUBLIC	FOOD / NUTRITION	5,188
NADIA'S INITIATIVE 660 US HWY ONE - 3RD FLOOR N PALM BEACH, FL 33408	N/A	PUBLIC	PUBLIC CHARITY	2,500
<b>Total . . . . . ▶ 3a</b>				554,688

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
REFUGEE AND IMMIGRATION CENTER 660 US HWY ONE - 3RD FLOOR N PALM BEACH, FL 33408	N/A	PUBLIC	PUBLIC CHARITY	5,000
TEAM HEART ORG 8511 FALLBROOK AVE STE 120 WEST HILLS, CA 91304	N/A	PUBLIC	PUBLIC CHARITY	2,500
URBAN JUSTICE CENTER 660 US HWY ONE - 3RD FLOOR N PALM BEACH, FL 33408	N/A	PUBLIC	PUBLIC CHARITY	5,000
<b>Total . . . . . ▶ 3a</b>				554,688

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
PEF ISRAEL ENDOWMENT FUNDS 630 3RD AV FL 15TH NEW YORK, NY 10017	N/A	PUBLIC	PUBLIC CHARITY	2,500
KIDS IN NEED OF DEFENSE 1201 L ST NW FLOOR 2 WASHINGTON, DC 20005	N/A	PUBLIC	PUBLIC CHARITY	5,000
WORLD CENTRAL KITCHEN 655 NEW YORK AVE NW 6TH FLOOR WASHINGTON, DC 20001	N/A	PUBLIC	PUBLIC CHARITY	10,000
<b>Total . . . . . ▶ 3a</b>				554,688

**TY 2019 Accounting Fees Schedule**

**Name:** GERTRUDE AND MURRAY BENNETT  
FAMILY FOUNDATION

**EIN:** 20-5716045

**Software ID:** 19009920

**Software Version:** 2019v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES - TAX COMPLIANCE	3,630	3,000	630	0

## TY 2019 Investments Corporate Stock Schedule

**Name:** GERTRUDE AND MURRAY BENNETT  
FAMILY FOUNDATION

**EIN:** 20-5716045

**Software ID:** 19009920

**Software Version:** 2019v5.0

### Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
FIDELITY-EQUITY INVESTMENTS	4,017,157	4,369,364
SCHWAB #2-EQUITY INVESTMENTS	411,031	403,576
TD AMERITRADE-EQUITY INVESTMENTS	1,102,819	1,096,244

**TY 2019 Legal Fees Schedule**

**Name:** GERTRUDE AND MURRAY BENNETT  
FAMILY FOUNDATION

**EIN:** 20-5716045

**Software ID:** 19009920

**Software Version:** 2019v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES RE: INVEST.ACTIVITY	10,000	10,000	0	0

**TY 2019 Other Expenses Schedule**

**Name:** GERTRUDE AND MURRAY BENNETT  
FAMILY FOUNDATION

**EIN:** 20-5716045

**Software ID:** 19009920

**Software Version:** 2019v5.0

**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVEST MANAGEMENT FEES	2,862	2,862		
INVEST SUBSCRIPTIONS, SOFTWARE, & MISC.	50,585	50,585		

**TY 2019 Taxes Schedule**

**Name:** GERTRUDE AND MURRAY BENNETT  
FAMILY FOUNDATION

**EIN:** 20-5716045

**Software ID:** 19009920

**Software Version:** 2019v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES W/H ON DIVIDENDS	1,907	1,907		