

EXTENDED TO NOVEMBER 16, 2020

Return of Private Foundation

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

OMB No 1545-0047

Form 990-PF

Department of the Treasury
Internal Revenue Service

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

2019
Open to Public Inspection

For calendar year 2019 or tax year beginning

and ending

Name of foundation

PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI

A Employer identification number

20-8353260

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

311 N. SUMNEYTOWN PIKE

Room/suite

1A

B Telephone number

215-699-1100

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

NORTH WALES, PA 19454-2532

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)

\$ 37,590,026.

J Accounting method:

☒

Cash

☐

Accrual

☐ Other (specify)

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

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).)

(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

2,248,578.

N/A

2 Check ☐ if the foundation is not required to attach Sch. B

Interest on savings and temporary cash investments

4 Dividends and interest from securities

706,457.

706,457.

STATEMENT 1

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

Gross sales price for all assets on line 6a

3,417,139.

524,260.

7 Capital gain net income (from Part IV, line 2)

524,260.

8 Net short-term capital gain

9 Income modifications

Gross sales less returns and allowances

10a Less Cost of goods sold

c Gross profit or (loss)

11 Other income

111620

193,963.

1,012.

STATEMENT 2

12 Total. Add lines 1 through 11

3,673,258.

1,231,729.

13 Compensation of officers, directors, trustees, etc

58,343.

0.

58,343.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees

b Accounting fees

STMT 3

17,385.

0.

17,385.

c Other professional fees

STMT 4

71,994.

71,994.

0.

17 Interest

18 Taxes

STMT 5

46,103.

2,337.

4,766.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses

STMT 6

2,568.

0.

2,568.

24 Total operating and administrative expenses. Add lines 13 through 23

196,393.

74,331.

83,062.

25 Contributions, gifts, grants paid

1,630,147.

1,630,147.

26 Total expenses and disbursements. Add lines 24 and 25

1,826,540.

74,331.

1,713,209.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

1,846,718.

b Net investment income (if negative, enter -0-)

1,157,398.

c Adjusted net income (if negative, enter -0-)

N/A

632

SCANNED NOV 30 2021

4/3

6

1

Internal Revenue Service
Received US Bank - USB
308

NOV 16 2019

Ogden, UT

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		3,921,723.	1,480,228.	1,480,228.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations STMT 7		9,745,875.	11,885,344.	12,216,656.
	b	Investments - corporate stock STMT 8		7,358,363.	7,067,130.	12,077,575.
	c	Investments - corporate bonds				
	Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less: accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other STMT 9		6,965,992.	9,316,616.	11,815,567.
14		Land, buildings, and equipment: basis ▶				
		Less: accumulated depreciation ▶				
15		Other assets (describe ▶)				
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		27,991,953.	29,749,318.	37,590,026.
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)		0.	0.		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/>					
	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 ▶ <input checked="" type="checkbox"/>					
	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		27,991,953.	29,749,318.		
29	Total net assets or fund balances		27,991,953.	29,749,318.		
30	Total liabilities and net assets/fund balances		27,991,953.	29,749,318.		

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	27,991,953.
2	Enter amount from Part I, line 27a	2	1,846,718.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	29,838,671.
5	Decreases not included in line 2 (itemize) ▶ TEMPORARY/OTHER BOOK-TAX DIFFERENCES	5	89,353.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	29,749,318.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a CAPITAL GAIN FROM PUBLIC SECURITIES	P		
b CAPITAL GAIN DISTRIBUTION	P		
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 3,417,034.		2,892,879.	524,155.
b 105.			105.
c			
d			
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			524,155.
b			105.
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	524,260.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2018	1,404,499.	32,402,989.	.043345
2017	1,218,694.	29,519,598.	.041284
2016	1,184,302.	25,917,796.	.045695
2015	1,242,718.	24,683,760.	.050346
2014	919,243.	22,414,164.	.041012

2 Total of line 1, column (d)	2	.221682
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	.044336
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	34,722,456.
5 Multiply line 4 by line 3	5	1,539,455.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	11,574.
7 Add lines 5 and 6	7	1,551,029.
8 Enter qualifying distributions from Part XII, line 4	8	1,713,209.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	11,574.
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	11,574.
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	11,574.
6 Credits/Payments:		
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	26,129.
b Exempt foreign organizations - tax withheld at source	6b	0.
c Tax paid with application for extension of time to file (Form 8868)	6c	0.
d Backup withholding erroneously withheld	6d	0.
7 Total credits and payments. Add lines 6a through 6d	7	26,129.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	14,555.
11 Enter the amount of line 10 to be: Credited to 2020 estimated tax 14,555. Refunded 0.	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		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	1b		X
c Did the foundation file Form 1120-POL for this year?	1c		X
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		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
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		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions PA			
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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Part VII-A Statements Regarding Activities (continued)

		Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions	11		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions SEE STATEMENT 10 SEE STATEMENT 11	12	X	
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	X	
14 The books are in care of MR. ANTHONY IMBESI Telephone no. 610-699-1100 Located at 311 N. SUMNEYTOWN PIKE, STE. 1A, NORTH WALES, PA ZIP+4 19454			
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country	16		X

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

		Yes	No
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a During the year, did the foundation (either directly or indirectly):			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<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? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here	N/A	1b	
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	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	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. <div style="border: 1px solid black; height: 20px; width: 100%;"></div>			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)	N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		4b	X

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

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 12		58,343.	0.	0.

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

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

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

0

Part IX-A Summary of Direct Charitable Activities

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

Total. Add lines 1 through 3

0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	32,801,757.
b	Average of monthly cash balances	1b	2,449,467.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	35,251,224.
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	35,251,224.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	528,768.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	34,722,456.
6	Minimum investment return. Enter 5% of line 5	6	1,736,123.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	1,736,123.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	11,574.
b	Income tax for 2019 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	11,574.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,724,549.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,724,549.
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	1,724,549.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	1,713,209.
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	1,713,209.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	11,574.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,701,635.

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.

Form 990-PF (2019)

PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				1,724,549.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			1,505,870.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 1,713,209.				
a Applied to 2018, but not more than line 2a			1,505,870.	
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				207,339.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2018 Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				1,517,210.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2020 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019				

Form 990-PF (2019)

C/O ANTHONY IMBESI

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

N/A

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

- b** Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(1)(3) or ☒ 4942(1)(5)

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

- b** 85% of line 2a

- c** Qualifying distributions from Part XII,
line 4, for each year listed

- d** Amounts included in line 2c not used directly for active conduct of exempt activities

- e Qualifying distributions made directly for active conduct of exempt activities**

Subtract line 2d from line 2c

- 3** Complete 3a, b, or c for the alternative test relied upon:

- a "Assets" alternative test - enter:
(1) Value of all assets

- (2) Value of assets qualifying under section 4942(j)(3)(B)(i)**

- b** "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed

- c "Support" alternative test - enter:**

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

- (3) Largest amount of support from an exempt organization**

- (4) Gross investment income**

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

1 Information Regarding Foundation Managers:

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

NONE

- b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

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

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

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

- 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:

PATRIARCH FAMILY FOUNDATION

Form 990-PF (2019)

C/O ANTHONY IMBESI

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Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ABINGTON HEALTH FOUNDATION 1200 OLD YORK RD ABINGTON, PA 19001		PC	GENERAL FUND	2,000.
ALLEN TOWNSHIP FIRE COMPANY #1 3530 HOWERTOWN RD, NORTHAMPTON, PA 18067		PC	GENERAL FUND	1,000.
BOSTON UNIVERSITY 233 BAY STATE ROAD BOSTON, MA 02118		PC	GENERAL FUND	1,000.
BOSTON UNIVERSITY COLLEGE OF COMMUNICATION 233 BAY STATE ROAD BOSTON, MA 02118		PC	GENERAL FUND	25,000.
CHURCH FARM SCHOOL 1001 E LINCOLN HWY EXTON, PA 19341		PC	GENERAL FUND	20,000.
Total SEE CONTINUATION SHEET(S) ▶ 3a				1,630,147.
b Approved for future payment				
NONE				
Total ▶ 3b				0.

Form 990-PF (2019)

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

- | | |
|---|--------------|
| 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)(3) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | Yes |
| a Transfers from the reporting foundation to a noncharitable exempt organization of: | |
| (1) Cash | 1a(1) |
| (2) Other assets | 1a(2) |
| b Other transactions: | |
| (1) Sales of assets to a noncharitable exempt organization | 1b(1) |
| (2) Purchases of assets from a noncharitable exempt organization | 1b(2) |
| (3) Rental of facilities, equipment, or other assets | 1b(3) |
| (4) Reimbursement arrangements | 1b(4) |
| (5) Loans or loan guarantees | 1b(5) |
| (6) Performance of services or membership or fundraising solicitations | 1b(6) |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c |
| 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. | |

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[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
N/A		

**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.

May the IRS discuss this return with the preparer shown below? See instr

☒ Yes ☐ No

Signature of officer or trustee

Date _____

► TRUSTEE

Title

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if
self-employed

PTIN

DAVID F. DOTSON

1.

11-9-20

P00738401

Firm's name ► **DELOITTE TAX LLP**

Firm's EIN ► 86-1065772

Firm's address ► 1700 MARKET STREET, 25TH FLOOR
PHILADELPHIA, PA 19103-3984

Phone no 215 246 2300

**PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI**

20-8353260

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
CROHNS & COLITIS FOUNDATION OF AMERICA 386 PARK AVE S FI 14 NEW YORK, NY 10016		PC	GENERAL FUND	50,000.
CYSTIC FIBROSIS FOUNDATION DE VALLEY 4550 MONTGOMERY AVE., SUITE 1100 N BETHESDA, MD 20814		PC	GENERAL FUND	2,500.
CYSTIC FIBROSIS FOUNDATION DE VALLEY 4550 MONTGOMERY AVE., SUITE 1100 N BETHESDA, MD 20814		PC	GENERAL FUND	2,500.
CYSTIC FIBROSIS FOUNDATION DE VALLEY 4550 MONTGOMERY AVE., SUITE 1100 N BETHESDA, MD 20814		PC	GENERAL FUND	40,000.
DREXEL UNIVERSITY 3401 MARKET STREET 3RD FLOOR SUITE 3000 PHILADELPHIA, PA 19104		PC	GENERAL FUND	5,000.
DREXEL UNIVERSITY 3401 MARKET STREET 3RD FLOOR SUITE 3000 PHILADELPHIA, PA 19104		PC	GENERAL FUND	25,000.
FAITH IN THE FUTURE 222 NORTH 17TH ST. PHILADELPHIA, PA 19103		PC	GENERAL FUND	30,000.
FOR PETE'S SAKE PO BOX 31039 ST. LOUIS, MO 63131		PC	GENERAL FUND	5,000.
GWYNEDD MERCY HIGH SCHOOL ACADEMY-CREW PROGRAM 1345 SUMNEYTOWN PIKE GWYNEDD VALLEY, PA 19437		PC	GENERAL FUND	10,000.
GWYNEDD MERCY ACADEMY 1345 SUMNEYTOWN PIKE GWYNEDD VALLEY, PA 19437		PC	GENERAL FUND	25,000.
Total from continuation sheets				1,581,147.

PATRIARCH FAMILY FOUNDATION
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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
GWYNEDD MERCY ACADEMY HIGH SCHOOL-CREW PROGRAM 1345 SUMNEYTOWN PIKE GWYNEDD VALLEY, PA 19437		PC	GENERAL FUND	1,100.
HEALTHLINK DENTAL CLINIC, INC. 1775 STREET RD SOUTHAMPTON, PA 18966		PC	GENERAL FUND	15,500.
HOLY SPIRIT HIGH SCHOOL 500 S NEW RD ABSECON, NJ 08201		PC	GENERAL FUND	20,000.
HOLY SPIRIT-MUSIC DEPARTMENT 500 S NEW RD ABSECON, NJ 08201		PC	GENERAL FUND	18,000.
INDEPENDENCE MISSION SCHOOLS 1012 WEST THOMPSON ST PHILADELPHIA, PA 19122		PC	GENERAL FUND	15,000.
KEYS CHILDREN FOUNDATION 24 DOCKSIDE LANE PMB 139 KEY LARGO, FL 33037		PC	GENERAL FUND	10,000.
MONTGOMERY CHILD ADVOCACY 409 CHERRY STREET NORRISTOWN, PA 19401		PC	GENERAL FUND	15,000.
MERCY FOCUS ON HAITI 1415 CEDAR POINT RD. NE CEDAR RAPIDS, IA 52402		PC	GENERAL FUND	3,000.
MERCY NEIGHBORHOOD MINISTRIES 1939 W. VENANGO STREET PHILADELPHIA, PA 19140		PC	GENERAL FUND	30,000.
MONTGOMERY BAR FOUNDATION 100 W AIRY ST NORRISTOWN, PA 19401		PC	GENERAL FUND	250.
Total from continuation sheets				

**PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI**

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
MONTGOMERY COUNTY SPCA 19 E. RIDGE PIKE CONSHOHOCKEN, PA 19428		PC	GENERAL FUND	250.
NATIONAL CONSTITUTION CENTER 525 ARCH ST PHILADELPHIA, PA 19106		PC	GENERAL FUND	30,000.
OCEAN REEF MEDICAL CENTER 28810 SW 154TH AVE HOMESTEAD, FL 33033		PC	GENERAL FUND	10,000.
PENN VET 3800 SPRUCE ST PHILADELPHIA, PA 19104		PC	GENERAL FUND	10,000.
PHILADELPHIA MUSEUM OF ART 2600 BENJAMIN FRANKLIN PKWY PHILADELPHIA, PA 19130		PC	GENERAL FUND	35,000.
PHILADELPHIA ZOO 3400 W GIRARD AVE PHILADELPHIA, PA 19104		PC	GENERAL FUND	10,000.
PHILLY FIGHTS CANCER C/O ABRAMSON CANCER CENTER 3400 SPRUCE ST PHILADELPHIA, PA 19104		PC	GENERAL FUND	10,000.
POLICE ATHLETIC LEAGUE 2 E 12TH ST 1 NEW YORK, NY 10003		PC	GENERAL FUND	2,500.
SAINT AUGUSTINE PREP 611 CEDAR AVE RICHLAND, NJ 08350		PC	GENERAL FUND	20,000.
SAINT ROSE OF LIMA - NORTH WALES 428 S MAIN ST. NORTH WALES, PA 19454		PC	GENERAL FUND	1,000.
Total from continuation sheets				

**PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI**

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
SHORE MEDICAL CENTER FOUNDATION 100 MEDICAL CENTER WAY SOMERS POINT, NJ 08244		PC	GENERAL FUND	5,000.
SISTERS OF MERCY-RETIREMENT- MC CAULEY CONVENT 513 MONTGOMERY AVENUE MERION, PA 19066		PC	GENERAL FUND	20,000.
ST. FRANCIS DE SALES SCHOOL 917 S. 47TH STREET PHILADELPHIA, PA 19143		PC	GENERAL FUND	5,000.
ST. MATTHEW SCHOOL 3040 COTTMAN AVENUE PHILADELPHIA, PA 19149		PC	GENERAL FUND	10,000.
SUFFOLK UNIVERSITY 8 ASHBURTON PL, BOSTON, MA 02108		PC	GENERAL FUND	2,000.
THE ED SNIDER YOUTH HOCKEY FOUNDATION 3601 S BROAD ST PHILADELPHIA, PA 19148		PC	GENERAL FUND	3,100.
THE LYRA SOCIETY 702 N 3RD ST STE 737 PHILADELPHIA, PA 19123		PC	GENERAL FUND	1,000.
THE PHILADELPHIA ORCHESTRA ASSOCIATION ONE SOUTH BROAD STREET, 14TH FLOOR PHILADELPHIA, PA 19107		PC	GENERAL FUND	30,000.
THOMAS JEFFERSON UNIVERSITY 4201 HENRY AVENUE PHILADELPHIA, PA 19114		PC	GENERAL FUND	50,000.
UCLA- SEMEL INSTITUTE 760 WESTWOOD PLZ LOS ANGELES, CA 90095		PC	GENERAL FUND	10,000.
Total from continuation sheets				

**PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI**

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
UDT SEAL MUSEUM ASSOCIATION INC 3300 N. HWY. A1A, NORTH HUTCHINSON ISLAND FORT PIERCE, FL 34949		PC	GENERAL FUND	10,000.
UNIVERSITY OF MIAMI SYLVESTER COMPREHENSIVE CANCER CENTER 1475 NW 12TH AVE MIAMI, FL 33136		PC	GENERAL FUND	2,500.
UNIVERSITY OF PENNSYLVANIA, MASTER OF PUBLIC HEALTH 3620 HAMILTON WALK PHILADELPHIA, PA 19104		PC	GENERAL FUND	16,000.
USC DORNSIFE COLLEGE OF LETTERS 3551 TROUSDALE PKWY STE 304 LOS ANGELES, CA 90089		PC	GENERAL FUND	17,000.
VILLANOVA UNIVERSITY 800 E LANCASTER AVE VILLANOVA, PA 19085		PC	GENERAL FUND	100,000.
VILLANOVA UNIVERSITY-URBINO PROGRAM 800 E LANCASTER AVE VILLANOVA, PA 19085		PC	GENERAL FUND	48,000.
WEATHERVANE MUSIC 1433 E OXFORD ST PHILADELPHIA, PA 19125		PC	GENERAL FUND	16,000.
JOHN R ELLIOTT HERO CAMPAIGN 101 VERA KING FARRIS DRIVE GALLOWAY, NJ 08205		PC	GENERAL FUND	1,000.
BEYOND CELIAC 124 S MAPLE ST AMBLER, PA 19002		PC	GENERAL FUND	5,000.
MONTGOMERY CHILD ADVOCACY 409 CHERRY STREET NORRISTOWN, PA 19401		PC	GENERAL FUND	20,000.
Total from continuation sheets				

**PATRIARCH FAMILY FOUNDATION
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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
OLD SAINT MARY CHURCH 252 S 4TH ST PHILADELPHIA, PA 19106		PC	GENERAL FUND	2,500.
SURREY SERV FOR SENIORS INC 60 SURREY WAY DEVON, PA 19333		PC	GENERAL FUND	5,000.
AUGUSTINIAN FUND 214 ASHWOOD ROAD VILLANOVA, PA 19085		PC	GENERAL FUND	5,000.
LANKENUA MEDICAL CENTER ZUCKERMAN FAMILY AUTOIMMUNE FUND 100 E. LANCASTER AVE WYNNEWOOD, PA 19096		PC	GENERAL FUND	5,000.
C.H.O.P. MARGARET E HARRON FUND FOR CYSTIC FIBROSIS RESEARCH PO BOX 7811352 PHILADELPHIA, PA 19178		PC	GENERAL FUND	100,000.
COOPER MED SCHOOL OF ROWAN UNIVERSITY 401 S BROADWAY CAMDEN, NJ 08103		PC	GENERAL FUND	50,000.
FRANKLIN INSTITUTE 222 N 20TH ST PHILADELPHIA, PA 19103		PC	GENERAL FUND	30,000.
GWYNEDD MERCY HIGH SCHOOL ATHLETIC EXPANSION 1345 SUMNEYTOWN PIKE GWYNEDD VALLEY, PA 19437		PC	GENERAL FUND	18,500.
SAINT AUGUSTINE PREP 611 CEDAR AVE RICHLAND, NJ 08350		PC	GENERAL FUND	20,000.
CYSTIC FIBROSIS FOUNDATION BID FOR A CURE 4550 MONTGOMERY AVE., SUITE 1100 N BETHESDA, MD 20814		PC	GENERAL FUND	10,000.
Total from continuation sheets				

**PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI**

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
VILLANOVA UNIVERSITY 800 E LANCASTER AVE VILLANOVA, PA 19085		PC	GENERAL FUND	20,000.
CUSTOM SHOOTOUT HURRICANE DORIAN RELIEF 2931NE 16TH STREET POMPANO BEACH, FL 33062		PC	GENERAL FUND	5,000.
FREE LIBRARY PHIL FOUNDATION 705 EAST CATHEDRAL ROAD PHILADELPHIA, PA 19128-2106		PC	GENERAL FUND	40,000.
HOMEBOY INDUSTRIES 130 BRUNO ST LOS ANGELES, CA 90012		PC	GENERAL FUND	4,700.
TRUSTEES OF UNIVERSITY OF PA 1 COLLEGE HALL, ROOM 211 PHILADELPHIA, PA 19104		PC	GENERAL FUND	250,000.
PEOPLE'S EMERGENCY CENTER 325 N 39TH ST PHILADELPHIA, PA 19104		PC	GENERAL FUND	500.
GIVING TREE 232 N 22ND ST PHILADELPHIA, PA 19103		PC	GENERAL FUND	250.
UPPER GWYNEDD TOWNSHIP FIRE DEPARTMENT 660 GARFIELD AVE LANSDALE, PA 19446		PC	GENERAL FUND	100.
WISSAHICKON FIRE CO 245 RACE ST AMBLER, PA 19002		PC	GENERAL FUND	100.
THE PATRIARCH FAMILY BANK OF AMERICA DONOR ADVISED FUND 311 N SUMNEYTOWN PIKE STE 1A NOTH WALES, PA 19454		PC	GENERAL FUND	100,700.
Total from continuation sheets				

PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI

20-8353260

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
CYSTIC FIBROSIS FOUNDATION 4550 MONTGOMERY AVE., SUITE 1100 N BETHESDA, MD 20814		PC	GENERAL FUND	10,000.
SIMEONE FOUNDATION AUTOMOTIVE MUSEUM 6825 NORWITCH DR PHILADELPHIA, PA 19153		PC	GENERAL FUND	10,000.
NORTH PENN VOLUNTEER FIRE CO 141 S MAIN ST NORTH WALES, PA 19454		PC	GENERAL FUND	100.
THE AARK WILDLIFE REHABILITATION AND EDUCATION CENTER 1531 UPPER STUMP RD CHALFONT, PA 18914		PC	GENERAL FUND	250.
GWYNEDD MERCY ACADEMY 1345 SUMNEYTOWN PIKE GWYNEDD VALLEY, PA 191437		PC	GENERAL FUND	1,100.
PHI GAMMA DELTA EDUCATIONAL FOUNDATION 1201 RED MILE RD LEXINGTON, KY 40544		PC	GENERAL FUND	1,300.
CROHNS & COLITIS FOUNDATION OF AMERICA 386 PARK AVE S FI 14 NEW YORK, NY 10016		PC	GENERAL FUND	347.
MATTIE DIXON COMMUNITY CUPBOARD 150 N MAIN ST AMBLER, PA 19002		PC	GENERAL FUND	1,000.
ELMWOOD PARK ZOO 1661 HARDING BLVD NORRISTOWN, PA 19401		PC	GENERAL FUND	2,000.
GUIDE DOGS FOR THE BLIND 350 LOS RANCHITOS ROAD SAN RAFAEL, CA 94903		PC	GENERAL FUND	500.
Total from continuation sheets				

20-8353260

3 Grants and Contributions Paid During the Year (Continuation)**Total from continuation sheets**

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

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

OMB No 1545-0047

2019

Name of the organization

**PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI**

Employer identification number

20-8353260

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

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

Special Rules

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

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

Name of organization

Employer identification number

PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI
20-8353260**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	MARGARET E. HARRON CHARITABLE LEAD UNITRUST 34 ISLAND DRIVE KEY LARGO, FL 33037	\$ 2,248,578.	Person <input checked="checked" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization PATRIARCH FAMILY FOUNDATION C/O ANTHONY IMBESI	Employer identification number 20-8353260
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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
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

**PATRIARCH FAMILY FOUNDATION
C/O ANTHONY IMBESI**

Employer identification number

20-8353260**Part III**

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

Use duplicate copies of Part III if additional space is needed

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

FORM 990-PF		DIVIDENDS AND INTEREST FROM SECURITIES			STATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDEND (BLACKSTONE)	2,444.	0.	2,444.	2,444.	
DIVIDENDS	485,141.	0.	485,141.	485,141.	
INTEREST	215,950.	0.	215,950.	215,950.	
INTEREST (BLACKSTONE)	2,922.	0.	2,922.	2,922.	
TO PART I, LINE 4	706,457.	0.	706,457.	706,457.	

FORM 990-PF		OTHER INCOME		STATEMENT 2
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
BLACKSTONE OTHER INCOME	673.	673.		
OTHER INCOME- DEPOSITS	265.	265.		
BLACKSTONE ORDINARY INCOME	74.	74.		
NONDIVIDEND DISTRIBUTIONS	9,493.	0.		
TAX EXEMPT INCOME	181,479.	0.		
TAX EXEMPT OID INCOME	1,979.	0.		
TOTAL TO FORM 990-PF, PART I, LINE 11	193,963.	1,012.		

FORM 990-PF		ACCOUNTING FEES		STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DELOITTE TAX, LLP	17,385.	0.		17,385.
TO FORM 990-PF, PG 1, LN 16B	17,385.	0.		17,385.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	71,994.	71,994.		0.
TO FORM 990-PF, PG 1, LN 16C	71,994.	71,994.		0.

FORM 990-PF	TAXES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	2,337.	2,337.		0.
FEDERAL TAXES (FORM 990)	39,000.	0.		0.
PAYROLL TAXES	4,766.	0.		4,766.
TO FORM 990-PF, PG 1, LN 18	46,103.	2,337.		4,766.

FORM 990-PF	OTHER EXPENSES			STATEMENT 6.
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSES	1,995.	0.		1,995.
OTHER EXPENSES	573.	0.		573.
TO FORM 990-PF, PG 1, LN 23	2,568.	0.		2,568.

FORM 990-PF		U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS		STATEMENT 7	
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
SEE STATEMENT A 2097		X	5,700,841.	5,989,294.	
SEE STATEMENT A 2097	X		6,184,503.	6,227,362.	
TOTAL U.S. GOVERNMENT OBLIGATIONS			6,184,503.	6,227,362.	
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			5,700,841.	5,989,294.	
TOTAL TO FORM 990-PF, PART II, LINE 10A			11,885,344.	12,216,656.	

FORM 990-PF		CORPORATE STOCK		STATEMENT 8	
DESCRIPTION		BOOK VALUE		FAIR MARKET VALUE	
SEE STATEMENT A 2097		2,119,594.		4,401,775.	
SEE STATEMENT B 2202		2,497,695.		3,119,996.	
SEE STATEMENT C 2224		1,935,891.		2,771,227.	
SEE STATEMENT D 2073		321,111.		448,244.	
SEE STATEMENT B 2202		192,839.		193,084.	
SEE STATEMENT E 9033		0.		1,143,249.	
TOTAL TO FORM 990-PF, PART II, LINE 10B		7,067,130.		12,077,575.	

FORM 990-PF		OTHER INVESTMENTS		STATEMENT 9
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
SEE STATEMENT D 2073	COST	9,316,616.	11,815,567.	
TOTAL TO FORM 990-PF, PART II, LINE 13		9,316,616.	11,815,567.	

FORM 990-PF	EXPLANATION CONCERNING PART VII-A, LINE 12 QUALIFYING DISTRIBUTION STATEMENT	STATEMENT 10
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EXPLANATION

THE FOUNDATION MADE A CONTRIBUTION OF \$100,700 TO THE BANK OF AMERICA CHARITABLE GIFT FUND IN 2019 THAT WAS TREATED AS A QUALIFYING DISTRIUBUTION.

FORM 990-PF	EXPLANATION CONCERNING PART VII-A, LINE 12 SECTION 170(C)(2)(B) STATEMENT	STATEMENT 11
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EXPLANATION

PURSUANT TO THE TERMS OF THE DONOR ADVISED FUND, THE DIRECTORS OF THE FOUNDATION WILL DIRECT THE DONOR ADVISED FUND TO DISTRIBUTE THE ASSETS TO PUBLIC CHARITIES.

FORM 990-PF

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

STATEMENT 12

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
PATRICIA H. IMBESI 34 ISLAND DRIVE KEY LARGO, FL 33037	TRUSTEE 0.00	0.	0.	0.
ANTHONY M. IMBESI 720 PLYMOUTH ROAD, BOX 156 GWYNEDD VALLEY, PA 19437	TRUSTEE 0.00	0.	0.	0.
PAUL H. IMBESI 34 ISLAND DRIVE KEY LARGO, FL 08226	TRUSTEE 0.00	0.	0.	0.
GIOVANNA C. IMBESI 34 ISLAND DRIVE KEY LARGO, FL 08226	TRUSTEE 0.00	0.	0.	0.
CHARLES L. IMBESI 34 ISLAND DRIVE KEY LARGO, FL 08226	TRUSTEE 20.00	58,343.	0.	0.
JOHN C. IMBESI 34 ISLAND DRIVE KEY LARGO, FL 08226	TRUSTEE 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		58,343.	0.	0.