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

OMB No 1945-0047

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.

Open to Rublic Inspection

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•	For cal	enda	r year 2019 or ta	x year beginning	, 2019	, and ending				
•		IRENE HERBERT BOSS AND HARPER GRANT S FOUNDATION C/O MICHAEL K RUTTER ESQ					Α	Employer identification nur	nber	
							L	22-6058004		
							B Telephone number (see instructions)			
	3 PARAGON WAY #300					$\vdash$	732-462-1990			
\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	r Kee.						c	If exemption application is	pending, check here 🕨	一 6
~ <b>``</b>	<b>€</b> Che	eck al	I that apply	Initial return	Initial return of a form	ner public charity	ם	1 Foreign organizations, chec	k here	$\overline{}$
1	2 /			Final return	Amended return		-		· ·	
•	×		Į	Address change	Name change			2 Foreign organizations meet here and attach computation	ing the 85% test, check	$\neg N$
-	H Che		pe of organization		1(c)(3) exempt private f			nere and adact computant	)II	⊔ ໑
•		Se	ction 4947(a)(1)	nonexempt charitable	trust Other taxable p	orivate foundation	E	If private foundation status		<b>4</b>
			t value of all assets a		counting method X C	ash Accrual	1	under section 507(b)(1)(A)	, check here	_ မ
•	•	n Part	II, column (c), line 1	· 1	Other (specify)		F	If the foundation is in a 60		<b>⊣ ⊢</b>
,	<b>►</b> \$		1,468,		column (d), must be on o	cash basis )	<u> </u>	under section 507(b)(1)(B)	, check here	
2	Pärt I		nalysis of Re		(a) Revenue and	(b) Net investme	n+	(c) Adjusted net	(d) Disbursements	
. <u>۲</u>		E)	<b>xpenses</b> (The llumns (b), (c), a	total of amounts in	expenses per books	income	111	income	for charitable	$\infty$
Ź		ne	cessarily equal t	the amounts in					purposes (cash basis only)	0
·Z.		co	lumn (a) (see inst	·· <del>····</del>		<b>4</b>				<b>೮</b>
SCANNED		1	<u> </u>	s, etc., received (attach schedule).			·	<del></del>		
-		2	Check ► X If the four	ndation is not required to attach Sch. B	<u></u>				2000	
M A R		3	Interest on savings and te	mporary cash investments					<b>280-89</b> 1	10
D .		4	Dividends and intere	st from securities	30,266.	30,26	66.	30,266.		
<b>ə</b>			Gross rents						202 202	<u> </u>
>		_ [	Net rental income or (loss)					4		
<u>ာ</u>	43		Net gain or (loss) from said Gross sales price for		61,159.	<u> </u>				
3	ž	_ `	assets on line 6a	203,323.	<u> </u>				101 - 10	<b>!</b>
•	Revenue	8	Capital gain net inco Net short-term capita	ome (from Part IV, line 2)		61,65	<u>. U</u>	0.65	<del>                                      </del>	<del>5</del> #
,	ğ	9	Income modifications	•			-	265.	121 8 15	<del>} </del>
	Œ	10 a	Gross sales less							7
•			returns and allowances						422	II
		t	Less <sup>,</sup> Cost of goods sold		-					-
,		c	Gross profit or (loss) (atta	ich schedule)		- <del>1                                   </del>			· · ·	<del>-</del> j
. (	0	11	Other income (attach	n schedule)						
	<b>A</b>								<u> </u>	
. 1	<u>\</u>	12	Total. Add lines 1 th		91,425.	91,91	.6.	30,531.		_]
•	<b>≫</b> ഗ	13	•	icers, directors, trustees, etc	0.	<u> </u>				
	<b>2</b>	14	Other employee sala Pension plans, employee	<del>-</del>					<del></del>	<del></del>
	xpensi	15	Legal fees (attach so	•						_
. ו ו	ж Х		Accounting fees (attach		6,525.	65	52.		E 073	
()	Ä	ľ	Other professional fees (a	000 000 0	14,152.	7,07			5,873 7,076	•
	ا ≚ٍ د	17	Interest		14,152.	7,01	0.	<del>                                     </del>	7,070	<u>'-</u>
֝֝֝֝֝֝֝֝֝֝֝֡ ֓֞֞֞֞֡֡֓֞֞֡֓֞֡֞֞֡֓֡֡֡֓֞֡֓֡֡֡֓֡֡֡֡֡֡	Administrative E	18	Taxes (attach schedule)(se	ee instrs). SEE STM 3	904.					
ά		19	Depreciation (attach						<b>W</b>	7
0	, <u>:</u>		schedule) and deplet	tion					S	
<b>@</b> :	, <u>F</u>	20	Occupancy Travel, conferences,	and meetings						_
<u>`</u>	, ¥ ∣	21 22	Printing and publicat	=					<del></del>	_
2021	and	23	Other expenses (atta						<del></del>	_
	ro		,	EE STATEMENT 4	10,033.	1,00	3.		9,030	
)	<u>.</u>	24	Total operating and	administrative						
	Operating		expenses. Add lines	CMMM C	31,614.	8,73	31.		21,979 80,000	<u>.</u>
~	<b>∀</b> ₫	25	Contributions, gifts, grants		80,000.				80,000	<u>.</u>
()	ιöl	26	Total expenses and Add lines 24 and 25	disbursements.	111 614	0 73	) 1		101 070	
C	}	27	Subtract line 26 from	s line 12:	111,614.	8,73	<u>.</u>	0.	101,979	<del>-</del>
$\Box$	)		Excess of revenue of							
JUCK	<b>,</b>		and disbursements	•	-20,189.					_
7	7	b	Net investment inco	me (if negative, enter -0-)	G	83,18	35.			
				e (if negative, enter -0-)	104			30,531.		
	BAA F	or Pa	perwork Reduct	ion Act Notice, see ins	tructions.	TEEA0301L 08	3/22/	19	Form 990-PF (2019)	7

Forn	n'990-	PF (2019) THE IRENE HERBERT ROSS AND HARPER	R GRANT	22-60	58004 Page 2
Pa	t III	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )	Beginning of year (a) Book Value	End ( (b) Book Value	of year (c) Fair Market Value
	1	Cash — non-interest-bearing	15,876.	15,914.	15, 914.
•	2	Savings and temporary cash investments	43,011.	19,422.	19,422.
	3	Accounts receivable	CANALLIA TIMES	15/422	
		Less allowance for doubtful accounts >			A STATE OF THE STA
	4	Pledges receivable	BANDO HOS DE LA	250.045000000	B
	'	Less: allowance for doubtful accounts	WALL TO A STATE OF THE	CATALOG AND	
	5	Grants receivable			-
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach sch)	Website And Str	DANTONIO TENZILI GOS VI	Charles was a read was a second
	'	Less allowance for doubtful accounts	THE COURT OF SIX	F 100 20 31 5 50 5	- 4 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1
	8	Inventories for sale or use			· · · · · · · · · · · · · · · · · · ·
	-	Prepaid expenses and deferred charges			
	9				
Assets		a Investments — U.S. and state government obligations (attach schedule).			
AS		no Investments — corporate stock (attach schedule)			
		: Investments — corporate bonds (attach schedule)			
	11	Investments — land, buildings, and equipment basis			
		Less. accumulated depreciation (attach schedule)	•		
	12	Investments - mortgage loans.			
	13	Investments — other (attach schedule)	1,300,881.	1,304,636.	1,433,416.
	14	Land, buildings, and equipment basis ►	TO THE PARTY OF TH		1/35 APLICABILITY
		Less accumulated depreciation (attach schedule)			
		Other assets (describe >)		•	
	16	Total assets (to be completed by all filers — see the instructions. Also, see page 1, item l).	1 250 760	1,220,072	1 460 750
	17	Accounts payable and accrued expenses	1,359,768.	1,339,972.	1,468,752.
	18	Grants payable	V=		Constant
S	19	Deferred revenue		*	1913 1913 1913 1913 1913 1913 1913 1913
itie	20	Loans from officers, directors, trustees, & other disqualified persons			MARCH TARREST
喜	21	Mortgages and other notes payable (attach schedule)			La Carta de la Car
Liabilities	22	Other liabilities (describe ► )			M. Savara and a savara
	1	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		•	# 3 m 2 m 2 m 2 m 2 m 2 m 2 m 2 m 2 m 2 m
	23	Total liabilities (add lines 17 through 22)	0.	0.	
ğ		Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30.		,	
<u>la</u>	24	Net assets without donor restrictions			
Net Assets or Fund Balances	25				WALL FOR THE
ב	25	Net assets with donor restrictions			
교		Foundations that do not follow FASB ASC 958, check here X and complete lines 26 through 30.		•	
Ģ	0.0	•	4 050 540		
Ş.	26	Capital stock, trust principal, or current funds	1,359,768.	1,339,972.	
Še	27	Paid-in or capital surplus, or land, bldg , and equipment fund			S. S
Ā	28	Retained earnings, accumulated income, endowment, or other funds	1 250 760	1 222 272	
<b>E</b>	30	Total net assets or fund balances (see instructions)  Total liabilities and net assets/fund balances	1,359,768.	1,339,972.	
DÄV	 	(see instructions) Analysis of Changes in Net Assets or Fund Balanc	1,359,768.	1,339,972.	
1	Total end-o	net assets or fund balances at beginning of year — Part II, colu of-year figure reported on prior year's return)	gree with 1	1,359,768.	
2	Enter	2	-20,189.		
3	Other i	ncreases not included in line 2 (itemize) SEE STATEMENT 6	3	393.	
4		ines 1, 2, and 3		4	1,339,972.
5		ses not included in line 2 (itemize)		5	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
6	Total	net assets or fund balances at end of year (line 4 minus line 5)	- Part II, column (b), I	ine 29 6	1,339,972.

	Calendar year (or tax year beginning in)  Adjusted qualifying distributions   Net value of noncharitable-use assets		(cc	Distribution ratio of (b) divided by col (c))	
	2018	101,066.	1,493,753.		0.06765
	2017	99,746.	1,492,537.	*	0.06683
	2016	100,522.	1,437,004.		0.06995
	2015	100,758.	1,534,375.		0.06566
	2014	104,380.	1,642,327.	,	0.06355
	Total of line 1, column (d).  Average distribution ratio for the number of years the foundation	5-year base period – divide the total or n has been in existence if less than	n line 2 by 5 0, or by the 5 years	2	0.33366
4	Enter the net value of nonchar	ritable-use assets for 2019 from Part	X, line 5	4	1,436,666
5	Multiply line 4 by line 3	5	95,873		
6	Enter 1% of net investment in	come (1% of Part I, line 27b)		6	832
7	Add lines 5 and 6			7	96,705
8	Enter qualifying distributions for	rom Part XII, line 4		8	101,979

Part VI instructions

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

Form'	990-PF (2019) THE IRENE HERBERT ROSS AND HARPER GRANT 22-60580	004		Page 4
Part	VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instru-	ctions)	_	
1 a	exempt operating foundations described in section 4940(d)(2), check here	- T	- * -	
	Date of ruling or determination letter (attach copy of letter if necessary – see instructions)		<del>(12)</del>	
b	Domestic foundations that meet the section 4940(e) requirements in Part V,			832.
	check here ► X and enter 1% of Part I, line 27b	<del></del>		
C.	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		<u> </u>	
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable			
	foundations only, others, enter -0-)			0.
3	Add lines 1 and 2			832.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)			0.
5	Fax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-       5			832.
6	Credits/Payments	= 4.	*	
a	2019 estimated tax pymts and 2018 overpayment credited to 2019			
b	Exempt foreign organizations — tax withheld at source 6b			
c ·	Tax paid with application for extension of time to file (Form 8868)			
d	Backup withholding erroneously withheld 6 d		r.	
7	Total credits and payments. Add lines 6a through 6d		1,	120.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here. If Form 2220 is attached.			
9	Fax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			0.
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			288.
11	Enter the amount of line 10 to be. Credited to 2020 estimated tax > 288. Refunded > 11			0.
Part	VII-A Statements Regarding Activities			
1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it	2 % 2 %	Yes	No
	participate or intervene in any political campaign?		a	X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes?		1	1
;	See the instructions for the definition	1	b	X
	f the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published	9	1	
	or distributed by the foundation in connection with the activities	<u>سط</u>		
c l	Ord the foundation file Form 1120-POL for this year?	1	С	X
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year  (1) On the foundation ►\$ (2) On foundation managers ►\$	0.	<u>'</u>	- I
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on	<del>  </del>		
	oundation managers ►\$ 0.	d ===		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		Х
	f 'Yes,' attach a detailed description of the activities	4)		
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
4al	Old the foundation have unrelated business gross income of \$1,000 or more during the year?	4	а	X
ы	f 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?	4	b N	/A
5	Vas there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
I	f 'Yes,' attach the statement required by General Instruction T	, 9		17
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either	-	-   -	1 1
•	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	<del></del>	
	old 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	
8 a 8	Enter the states to which the foundation reports or with which it is registered. See instructions		1.	
_	NJ	_  '		•
bi	f the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General	<u></u>		
	or designate) of each state as required by General Instruction G? If 'No,' attach explanation	<u>8</u>	b X	<u></u>
9	s the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j or calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If 'Yes,' complete Part X	)(5) 🛁	<u>-  </u>	17
		.IV <u>9</u>	<del> </del>	X
	Old any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	10		
BAA	iliu auul 65563		90-PF (2	<u>X</u> 2019)
_,		. 51111 3		-010)

Pai	Tt VII-A Statements Regarding Activities (continued)				
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	Yes	No 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		12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption applic	ation?	13	X	
14	Website address  ► N/A  The books are in care of ► MICHAEL K RUTTER ESQ  Telephone no ►	 732 <b>-</b> 4	 62-1	 990	- <b></b> -
15	Located at ► 3 PARAGON WAY FREEHOLD NJ ZIP + 4 ► 07	728-957	5		
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	A/N		∐ 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?	!	16	Yes	No X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country		. 4	;	
Pai	t 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.		<u>-</u>	Yes	No
1 a	During the year, did the foundation (either directly or indirectly)	_		,	
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes	X No		, ,	٨
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	X No		,	ĺ
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? . Yes	X No	ľ	'	آ•
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes	XNo			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  Yes	X No	1	-	· .
	(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)	XNo	ايا	:  ,  ]	•
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	_	*	-,	<u>ا. د :</u>
	Organizations relying on a current notice regarding disaster assistance, check here	<b>-</b> []	1 b	N	'A
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?		1 c	7	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))				
а	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?	X No			
	If 'Yes,' list the years ► 20 _ , 20 _ , 20 , 20	ليشا	<u>,</u>		
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2)		η.		
	(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).		2 b	N	'A
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here				
	► 20 , 20 , 20 , 20				
3 a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  Yes	X No		,	
b	of the 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		<u> </u>	·	
	determine if the foundation had excess business holdings in 2019)		3 b	N	'A
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4 a		Х
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could		,	7, 7	
	jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		4 b		<u>·</u>
BAA		Fo:	rm <b>990</b>	 -PF (2	

Form'990-PF (2019) THE IRENE HERBERT   Part VII-B   Statements Regarding Activit			22-60	58004 Page
A STREET, TO AND ADDRESS OF THE PARTY OF THE		14/20 May De Req	uneu (continuea)	La sinta
5 a During the year, did the foundation pay or incur a (1) Carry on propaganda, or otherwise attempts	=	n (section 4945(e))?	Yes X	No Yes No
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	No			
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	Yes X	No
(4) Provide a grant to an organization other than in section 4945(d)(4)(A) <sup>7</sup> See instructions	n a charitable, etc , organi S	zation described	. Yes X	No
(5) Provide for any purpose other than religion educational purposes, or for the prevention	ous, charitable, scientific on of cruelty to children	c, literary, or or animals?	Yes X	No .
b If any answer is 'Yes' to 5a(1)—(5), did any or described in Regulations section 53 4945 or in a See instructions	f the transactions fail to current notice regarding c	qualify under the exce disaster assistance?	ptions	5 b N/A
Organizations relying on a current notice rega	ardıng disaster assistand	ce, check here	► [	
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon If 'Yes,' attach the statement required by Reg	isibility for the grant?	•	N/A Yes	] No
6 a Did the foundation, during the year, receive a on a personal benefit contract?		` '	s Yes X	]No
<b>b</b> Did the foundation, during the year, pay prem If 'Yes' to 6b, file Form 8870	liums, directly or indirec	tly, on a personal bene	fit contract?	6 b X
7a At any time during the tax year, was the found	, , ,			No
<ul><li>b If 'Yes,' did the foundation receive any proces</li><li>8 Is the foundation subject to the section 4960 tax of</li></ul>			· ·	N/A 7b
or excess parachute payment(s) during the ye	· -	ari \$7,000,000 iii remane		No
Part VIII Information About Officers, D and Contractors				Employees,
1 List all officers, directors, trustees, and foun	dation managers and th	neir compensation. See	instructions.	,
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
MICHAEL K. RUTTER ESQ. 3 PARAGON WAY STE 300 FREEHOLD, NJ 07728	DIRECTOR 2.00	0.	0.	0.
MARK S. STEVENS ESQ. 3 PARAGON WAY STE 300 FREEHOLD, NJ 07728	DIRECTOR 0.25	0.	0.	0.
JOHN WEBSTER 3 PARAGON WAY STE 300 FREEHOLD, NJ 07728	DIRECTOR 0.25	0.	0.	0.
2 Compensation of five highest-paid employees (o		on line I – see instructio	ns). If none, enter 'NONE (d)Contributions to	<u> </u>
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
		-		
Total number of other employees paid over \$50,000	0		<b>-</b>	0
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TEEA0306L 08/22/19

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Form 990-PF (2019) THE IRENE HERBERT ROSS AND HARPER GRANT  [Part VIII Information About Officers, Directors, Trustees, Foundation Mand Contractors (continued)	22-605 anagers, Highly Paid E	
3 Five highest-paid independent contractors for professional services. See instructions	s. If none, enter 'NONE.'	-
(a) Name and address of each person paid more than \$50,000 (	b) Type of service	(c) Compensation
NONE		
		1
		· · · · · · · · · · · · · · · · · · ·
		<del>,</del>
Total number of others receiving over \$50,000 for professional services	<b>&gt;</b>	0
Part IX-A. Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information organizations and other beneficiaries served, conferences convened, research papers produced, etc.	such as the number of	Expenses
1 N/A		<del></del>
2		
	· <b></b>	
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Part IX-B! Summary of Program-Related Investments (see instructions)	I	
Describe the two largest program-related investments made by the foundation during the tax year o	n lines 1 and 2	Amount
1 <u>N/A</u>		
2		
All other program-related investments. See instructions		
3		
Total Add lines 1 through 2		
Total. Add lines 1 through 3  BAA	<u></u>	0.
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Rank Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) 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. 1 a 1,409,957. 1 b b Average of monthly cash balances 48,587. c Fair market value of all other assets (see instructions) 1 c d Total (add lines 1a, b, and c) 1 d 1,458,544 e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1 e 0 2 Acquisition indebtedness applicable to line 1 assets 2 n 3 Subtract line 2 from line 1d 1,458,544. Cash deemed held for charitable activities Enter 1-1/2% of line 3 21,878. (for greater amount, see instructions) 4 5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4 1,436,666. Minimum investment return. Enter 5% of line 5 6 71,833. Rantix Distributable Amount (see instructions) (Section 4942(1)(3) and (1)(5) private operating foundations and certain foreign organizations, check here | and do not complete this part.) Minimum investment return from Part X, line 6 1 71,833. 2 a Tax on investment income for 2019 from Part VI, line 5 2 a 832 2 b b Income tax for 2019. (This does not include the tax from Part VI) c Add lines 2a and 2b **2** c 832. Distributable amount before adjustments Subtract line 2c from line 1 3 71,001. 4 Recoveries of amounts treated as qualifying distributions 5 Add lines 3 and 4 71,001 6 6 Deduction from distributable amount (see instructions) Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1 7 71,001. RartiXIII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26 1 a 101,979. b Program-related investments - total from Part IX-B 1 b 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 Amounts set aside for specific charitable projects that satisfy the a Suitability test (prior IRS approval required) 3 a **b** Cash distribution test (attach the required schedule) 3 b Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 4 101,979. Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b See instructions 5 832. 6 Adjusted qualifying distributions. Subtract line 5 from line 4 101,147.

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

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Form 990-PF (2019)

### Part XIII Undistributed Income (see instructions)

1 Distributable amount for 2019 from Part XI, Inc P 2 Indistributed accome, if any, as of the end of 2019 a Enter amount for 2018 only b Total for prory years 20 , 20 , 20 3 Excess detributions carrywer, if any, w 2019 a From 2014 2 5, 073 . b From 2016 3 0, 10.6. d From 2016 3 0, 10.6. d From 2017 2 7, 525 . e From 2018 2 8, 426 . I Total of lines 3a through e 4 Qualifying distributions for 2019 from Part XII, Inse 4 ≥ 6 101, 979 . a Applied to 2018, but not more than line 2s b Applied to undistributed income of prior years (Efection required — see instructions) 4 Applied to 2019 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carrywer applied 2019 (If an amount appears in column (a)) 6 Enter the net total of each column as indicated before a column as indicated both or, and 4c Subtact line 5 b From years' undestributed income Subtract line 46 from line 2 This account may be shown in each 2019 d Subtract line 66 from line 6 Taxable amount e Indistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be shown and 943(2) at a has been previously assessed  d Subtract line 6c from line 6b Taxable amount in 2 Taxable amount = see instructions  0 Through Rad line 3 (4, and 45 Subtact lines 4d and 5 from line 1 This amount must be shown as en instructions  0 Through Rad line 3 (4, and 5 from line 6 Taxable amount = see instructions  0 Through Rad line 3 (4, and 5 from line 6) Taxable amount = see instructions  0 Through Rad line 3 (4, and 5 from line 6 Through lines 4d and 5 from line 6 Through lines 5 of line 7 (see instructions)  0 Secrees distributions carryor and 2014 not applied on line 5 or line 7 (see instructions)  1 Distributed income for 2019 Subtract lines 4d and 5 from line 6 Through lines 5 or line 7 (see instructions)  2 Distributed income for 2019 Subtract lines 4d and 5 from line 6 Through lines 5 or line 7 (see instructions)  2 Distributed lines 5 or line 7 (see instructions)  2 Distributed lines 5 or line 7 (see instructions)  2 Distri			<b>(a)</b> Corpus	(b) Years prior to 2018	<b>(c)</b> 2018	<b>(d)</b> 2019
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c From 2016	<b>b</b> From 2015					
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Total of lines 3a through e						1
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Form 990-PF (2019) THE IRENE HERBER				22-605800	4 Page 10
Part XIV Private Operating Founda				<u> </u>	N/A
1 a If the foundation has received a ruling or det- is effective for 2019, enter the date of the	ruling		-	_ ·	
<b>b</b> Check box to indicate whether the founda		erating foundation d		4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years		(e) Total
investment return from Part X for	(a) 2019	<b>(b)</b> 2018	(c) 2017	(d) 2016	
each year listed . b 85% of line 2a.		<del> </del>			
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.				İ	
a 'Assets' alternative test — enter		/	1		
(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				ę L	
c 'Support' alternative test – enter					
(1) Total support other than gross		1			
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				\ <del></del>	
(4) Gross investment income .				<del> </del>	
Part XV Supplementary Information	(Complete this	part only if the	foundation had	\$5,000 or more	in
assets at any time during th	nė year – see in	structions.)		. ,	
1 Information Regarding Foundation Mana	•				
a List any managers of the foundation who hav close of any tax year (but only if they hav	e contributed more the contributed more	nan 2% of the total co than \$5,000). (See	ontributions received section 507(d)(2)	by the foundation bef	ore the
NONE					
			· · · · · · · · · · · · · · · · · · ·	·	
b List any managers of the foundation who owr a partnership or other entity) of which the	n 10% or more of the foundation has a 1	stock of a corporation  Owner or greater interest	n (or an equally large est	e portion of the owner	ship of
NONE		5			
2 Information Regarding Contribution, Grant,					
Check here Lifthe foundation only make requests for funds. If the foundation make					
2a, b, c, and d See instructions	es giits, grants, etc	, to individuals of of	rganizations under t	other conditions, cor	ripiete items
a The name, address, and telephone number of	r email address of th	e person to whom ap	plications should be	addressed	
SEE STATEMENT 8					
b The form in which applications should be	submitted and infor	mation and materia	ils they should inclu	de	<del></del>
.,			,		
SEE STATEMENT FOR LINE 2A					
c Any submission deadlines					
SEE STATEMENT FOR LINE 2A					
d Any restrictions or limitations on awards,	such as by geograp	hical areas, charita	ble fields, kinds of i	nstitutions, or other	factors
CEE CHAMPMENT FOR LINE OF					
SEE STATEMENT FOR LINE 2A		CA02101			orm 990 BE (0010)
BAA	TEI	EA0310L 08/22/19		F	orm <b>990-PF</b> (2019)

Form 990-PF (2019) THE IRENE HERBERT ROSS AND HARPER GRANT 22-6058004 Page 11 Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Foundation status of recipient Recipient Purpose of grant or contribution Amount Name and address (home or business) a Paid during the year ► 3a Total b Approved for future payment ► 3b Total Form **990-PF** (2019) BAA TEEA0501L 08/22/19

# Form 990-PF (2019) THE IRENE HERBERT ROSS AND HARPER GRANT 22-6058004 Part XVIII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of	_1	r d	1
(1) Cash	1 a (1)	,	X
(2) Other assets	1 a (2)		X
<b>b</b> Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1 b (1)		X
(2) Purchases of assets from a noncharitable exempt organization	1 b (2)		X
(3) Rental of facilities, equipment, or other assets	1 b (3)		X
(4) Reimbursement arrangements	. 1 b (4)		X
(5) Loans or loan guarantees	1 b (5)		X
(6) Performance of services or membership or fundraising solicitations	1 b (6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1 c		
	<u> </u>		
d If the answer to any of the above is 'Yes,' complete the following schedule. Column (b) should always show the the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services re	fair market vali alue in eceived	ue of	
(a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transaction		gements	 s
N/A	<del></del>		
		*	
			_
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	X	No
b If 'Yes,' complete the following schedule  (a) Name of organization  (b) Two of organization  (c) Description	of relationship		
(a) Name of organization (b) Type of organization (c) Description of the control	or relationship		
N/A			
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my known	owledge and belief, if	is true	
correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge  Sign	May the If	RS discu	ss
Here Michael B. Rutter 1/8/1030 DIRECTOR President	preparer s See mstru	shown be	
Signature of officer or trustee Date Title		Yes	No ∤
Print/Type preparer's name Preparer's signature Date Check	If PTIN		
Paid BEATA GROCHOWICZ Beata Grockovick 7112020 self-employed	d P01235	580	
	5-3668831		
Use Only Firm's address 13 ROSZEL RD			
	(609) 452-8	3735	
BAA	Form <b>990</b>		2019)

STATEMENT 2		FEDERAL STATEMENTS THE IRENE HERBERT ROSS AND HARPER GRANT ROSS FOUNDATION C/O MICHAEL K RUTTER ESQ	PAGE 1 22-6058004
EXPENSES   INVESTMENT   ADJUSTED   FURDISSES   FORM 990-PF, PART  , LINE 18   TAXES	FORM 990-PF, PART I, LINE	16B	
FORM 990-PF, PART I, LINE 16C OTHER PROFESSIONAL FEES  (A) EXPENSES INVESTMENT ADJUSTED CHARITABLE PURPOSES  INVESTMENT ADVISORY FEES  (B) NET INCOME NET INCOME PURPOSES  \$ 14,152. \$ 7,076. \$ 7,076. \$ 0. \$ 7,076.   STATEMENT 3 FORM 990-PF, PART I, LINE 18 TAXES  (A) EXPENSES PER BOOKS INVESTMENT ADJUSTED CHARITABLE PURPOSES  (A) EXPENSES INVESTMENT ADJUSTED CHARITABLE PURPOSES  FEDERAL EXCISE TAX ON INVESTMENT INCOME TOTAL  (B) NET INCOME NET INCOME PURPOSES  FEDERAL EXCISE TAX ON INVESTMENT INCOME TOTAL  (A) EXPENSES PER BOOKS INVESTMENT ADJUSTED PURPOSES  (A) EXPENSES INVESTMENT ADJUSTED CHARITABLE PURPOSES  (A) EXPENSES INVESTMENT ADJUSTED CHARITABLE PURPOSES  (B) NET INCOME PURPOSES  (C) (D) CHARITABLE PURPOSES  (A) EXPENSES INVESTMENT ADJUSTED CHARITABLE PURPOSES	ACCOUNTING & TAX PREPA	EXPENSES INVESTMENT ADJUSTED PER BOOKS INCOME NET INCOME	CHARITABLE PURPOSES \$ 5,873.
EXPENSES   INVESTMENT   ADJUSTED   CHARTABLE   PER BOOKS   S   14,152.   \$ 7,076.   \$ 7,076.   \$ 7,076.	FORM 990-PF, PART I, LINE	16C ES	
FORM 990-PF, PART I, LINE 18  (A) (B) NET (C) (D)  EXPENSES INVESTMENT ADJUSTED CHARITABLE PER BOOKS INCOME NET INCOME PURPOSES  FEDERAL EXCISE TAX ON INVESTMENT INCOME \$ 904.  TOTAL \$ 904.  TOTAL \$ 904.  TOTAL \$ 904.  FORM 990-PF, PART I, LINE 23  OTHER EXPENSES  (A) (B) NET (C) (D)  EXPENSES INVESTMENT ADJUSTED CHARITABLE PER BOOKS INCOME NET INCOME PURPOSES  OFFICE & BOOKKEEPING SERVICES-SEE STATEM \$ 10,033. \$ 1,003. \$ 9,030.	INVESTMENT ADVISORY FE	EXPENSES INVESTMENT ADJUSTED PER BOOKS INCOME NET INCOME  ES \$ 14,152. \$ 7,076.	CHARITABLE PURPOSES  \$ 7,076.
EXPENSES INVESTMENT ADJUSTED CHARITABLE PER BOOKS  FEDERAL EXCISE TAX ON INVESTMENT INCOME  \$ 904.	FORM 990-PF, PART I, LINE	18	
FORM 990-PF, PART I, LINE 23 OTHER EXPENSES  (A) (B) NET (C) EXPENSES INVESTMENT ADJUSTED CHARITABLE PER BOOKS INCOME NET INCOME PURPOSES  OFFICE & BOOKKEEPING SERVICES-SEE STATEM \$ 10,033. \$ 1,003. \$ 9,030.	FEDERAL EXCISE TAX ON	EXPENSES INVESTMENT ADJUSTED PER BOOKS INCOME NET INCOME INVESTMENT INCOME \$ 904.	CHARITABLE PURPOSES
EXPENSES INVESTMENT ADJUSTED CHARITABLE PER BOOKS INCOME NET INCOME PURPOSES  OFFICE & BOOKKEEPING SERVICES-SEE STATEM \$ 10,033. \$ 1,003. \$ 9,030.	FORM 990-PF, PART I, LINE	23	
	OFFICE & BOOKKEEPING S	EXPENSES INVESTMENT ADJUSTED PER BOOKS INCOME NET INCOME ERVICES-SEE STATEM \$ 10,033. \$ 1,003.	CHARITABLE PURPOSES  \$ 9.030.

,

C. Inches

2019

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#### **FEDERAL STATEMENTS**

PAGE 2

## THE IRENE HERBERT ROSS AND HARPER GRANT ROSS FOUNDATION C/O MICHAEL K RUTTER ESQ

22-6058004

STATEMENT 5 FORM 990-PF, PART I, LINE 25 CONTRIBUTIONS, GIFTS, AND GRANTS

CASH GRANTS AND ALLOCATIONS

DONEE'S NAME: AMOUNT GIVEN:

SEE SCHEDULE ATTACHED

\$ 80,000.

TOTAL \$ 80,000.

STATEMENT 6 FORM 990-PF, PART III, LINE 3 OTHER INCREASES

NON-DIVIDEND DISTRIBUTIONS

TOTAL \$ 393.

#### STATEMENT 7 FORM 990-PF, PART IV, LINE 1 CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

		(B) HOW	(C) DATE	(D) DATE
ITEM	(A) DESCRIPTION	ACQUIRED	ACQUIRED	SOLD
1	172.128 BOSTON PARTNERS LONGSHORT RESEARCH	PURCHASED	12/13/2018	7/15/2019
2	189.594 PIMCO SENIOR FLOATING RATE	PURCHASED	VARIOUS	1/24/2019
3	493.097 ARTISAN MID CAP VALUE	PURCHASED	9/14/2012	11/12/2019
4 5	1,297.578 ROYCE TOTAL RETURN FUND	PURCHASED	VARIOUS	11/12/2019
5	3,192.269 BOSTON PARTNERS LONGSHORT RESEARCH			1
		PURCHASED	VARIOUS	VARIOUS
6	114.830 GABELLI ASSET FUND	PURCHASED	12/27/2012	11/12/2019
7	2,900.232 PIMCO LOW DURATION INCOME	PURCHASED	1/22/2018	4/29/2019
8	4,516.799 PIMCO SENIOR FLOATING RATE	PURCHASED	1/22/2018	1/24/2019
9	359.712 WASATCH SMALL CAP GROWTH FUND INSTL			
		PURCHASED	1/16/2015	11/12/2019
10	735.294 FPA CRESCENT FUND	PURCHASED	7/16/2009	11/12/2019
11	399.309 GABELLI ASSET FUND	PURCHASED	VARIOUS	11/12/2019
13	CAPITAL GAIN DIVIDENDS			
13	WASH SALE			
13 13				

ITEM 1 2 3 4 5 6 7 8 9 10 11 13 13	(E) GROSS SALES 2,663. 1,831. 10,000. 14,981. 49,153. 6,700. 25,000. 43,632. 15,000. 24,981. 23,299.	(F) DEPREC. ALLOWED	(G) COST BASIS 2,398. 1,883. 10,736. 15,579. 44,480. 6,380. 24,654. 44,922. 15,698. 18,904. 16,530.	(H) GAIN (LOSS)  26552736598. 4,673. 320. 3461,290698. 6,077. 6,769.	(I) FMV <u>12/31/69</u>	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	-1, 2, -1, 2, -6, 7, 46, 0, 0	65. 52. 36. 98. 73. 20. 46. 90. 98.
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2019

#### FEDERAL STATEMENTS

PAGE 3

THE IRENE HERBERT ROSS AND HARPER GRANT ROSS FOUNDATION C/O MICHAEL K RUTTER ESQ

22-6058004

STATEMENT 7 (CONTINUED) FORM 990-PF, PART IV, LINE 1 CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

(E) GROSS ITEM SALES

(F) DEPRÉC. ALLOWED

(G) COST BASIS

(H) GAIN (LOSS)

(I) **FMV** 12/31/69

(J) ADJ. BAS. 12/31/69

(K) **EXCESS** (I) - (J)TOTAL \$

(L) GAIN (LOSS) 61,650.

**STATEMENT 8** 

FORM 990-PF, PART XV, LINE 2A-D APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:

NAME:

CARE OF:

STREET ADDRESS:

CITY, STATE, ZIP CODE:

TELEPHONE:

E-MAIL ADDRESS:

FORM AND CONTENT:

THE IRENE HERBERT ROSS AND HARPER GRANT

ROSS FOUNDATION

MICHAEL K. RUTTER ESO. 3 PARAGON WAY STE 300 FREEHOLD, NJ 07728-9575 732-462-1990

REQUEST MAY BE VERBAL OR WRITTEN AND DESCRIBE THE USE OF

THE GRANT

SUBMISSION DEADLINES: NONE RESTRICTIONS ON AWARDS:

PREFERENCE GIVEN TO NEW JERSEY AND CONNECTICUT

ORGANIZATIONS BUT OTHERS MAY QUALIFY