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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2019

Open to Public Inspection

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

Name of foundation
KAPLAN FAMILY FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)
CO 2117 PINE STREET

City or town, state or province, country, and ZIP or foreign postal code
PHILADELPHIA, PA 19103

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) \$ 8,213,595

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify)

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

A Employer identification number
41-1794327

B Telephone number (see instructions)
(952) 927-9338

C If exemption application is pending, check here

D 1. Foreign organizations, check here

2 Foreign organizations meeting the 85% test, check here and attach computation

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

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

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

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	75,132		
	2 Check ☐ if the foundation is not required to attach Sch B			
	3 Interest on savings and temporary cash investments	45	45	
	4 Dividends and interest from securities	111,910	111,910	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	68,301		
	b Gross sales price for all assets on line 6a 407,663			
	7 Capital gain net income (from Part IV, line 2)		68,301	
	8 Net short-term capital gain			
	9 Income modifications			
	10a Gross sales less returns and allowances			
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	255,388	180,256		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0	0
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits			
	16a Legal fees (attach schedule)			
	b Accounting fees (attach schedule)	3,038	3,038	0
	c Other professional fees (attach schedule)	28,017	28,017	0
	17 Interest			
	18 Taxes (attach schedule) (see instructions)			
	19 Depreciation (attach schedule) and depletion			
	20 Occupancy			
	21 Travel, conferences, and meetings			
	22 Printing and publications			
	23 Other expenses (attach schedule)	765	765	0
	24 Total operating and administrative expenses. Add lines 13 through 23	31,820	31,820	0
25 Contributions, gifts, grants paid	386,560		386,560	
26 Total expenses and disbursements. Add lines 24 and 25	418,380	31,820	386,560	
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	-162,992		
	b Net investment income (if negative, enter -0-)		148,436	
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2019)

Part II 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 of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	102,757	60,441	60,441
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,962,610	1,766,669	8,153,154
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,065,367	1,827,110	8,213,595	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.				
	24	Net assets without donor restrictions			
	25	Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ and complete lines 26 through 30.				
	26	Capital stock, trust principal, or current funds	1,923,130	1,847,865	
	27	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	28	Retained earnings, accumulated income, endowment, or other funds	142,237	-20,755	
	29	Total net assets or fund balances (see instructions)	2,065,367	1,827,110	
30	Total liabilities and net assets/fund balances (see instructions) .	2,065,367	1,827,110		

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	2,065,367
2	Enter amount from Part I, line 27a	2	-162,992
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	1,902,375
5	Decreases not included in line 2 (itemize) ▶ _____	5	75,265
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	1,827,110

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a See Additional Data Table				
b				
c				
d				
e				

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	68,301
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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



Yes



No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2018	370,965	7,153,944	0 051855
2017	342,746	6,606,959	0 051877
2016	288,392	5,697,725	0 050615
2015	278,071	5,698,325	0 048799
2014	281,592	5,430,620	0 051853
2 Total of line 1, column (d)			2 0 254999
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years			3 0 051000
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 7,531,928
5 Multiply line 4 by line 3			5 384,128
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,484
7 Add lines 5 and 6			7 385,612
8 Enter qualifying distributions from Part XII, line 4			8 386,560

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	1,484
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	1,484
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,484
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	3,384
b	Exempt foreign organizations—tax withheld at source	6b	
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	3,384
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,900
11	Enter the amount of line 10 to be Credited to 2020 estimated tax ☐ 1,900 Refunded ☐	11	0

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ RACHEL KAPLAN Telephone no ▶ (952) 927-9338			

Located at **▶** 6566 FRANCE AVENUE SO MINNEAPOLIS MN ZIP+4 **▶** 554351714

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ ☐	15		
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	Yes	No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019? If "Yes," list the years ▶ 20____, 20____, 20____, 20____ ☐ Yes ☒ 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).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2019).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b		No

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

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

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

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. ►		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ►	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	7,608,898
b	Average of monthly cash balances.	1b	37,729
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	7,646,627
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	7,646,627
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	114,699
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	7,531,928
6	Minimum investment return. Enter 5% of line 5.	6	376,596

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	376,596
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	1,484
b	Income tax for 2019 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,484
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	375,112
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	375,112
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	375,112

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	386,560
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	386,560
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	1,484
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	385,076

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				375,112
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2019				
a From 2014.	17,671			
b From 2015.	6,011			
c From 2016.	6,014			
d From 2017.	15,644			
e From 2018.	18,038			
f Total of lines 3a through e.	63,378			
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ 386,560				
a Applied to 2018, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2019 distributable amount.				375,112
e Remaining amount distributed out of corpus	11,448			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	74,826			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2018 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions).	17,671			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	57,155			
10 Analysis of line 9				
a Excess from 2015.	6,011			
b Excess from 2016.	6,014			
c Excess from 2017.	15,644			
d Excess from 2018.	18,038			
e Excess from 2019.	11,448			

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling. ▶					
b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
b 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)) See Additional Data Table	
b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest	
2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:	
Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.	
a The name, address, and telephone number or email address of the person to whom applications should be addressed	
b The form in which applications should be submitted and information and materials they should include	
c Any submission deadlines	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	386,560
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2019)

Part XVII

- 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?
- a** Transfers from the reporting foundation to a noncharitable exempt organization of
- (1) Cash.
- (2) Other assets.
- b** Other transactions
- (1) Sales of assets to a noncharitable exempt organization.
- (2) Purchases of assets from a noncharitable exempt organization.
- (3) Rental of facilities, equipment, or other assets.
- (4) Reimbursement arrangements.
- (5) Loans or loan guarantees.
- (6) Performance of services or membership or fundraising solicitations.
- c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees.
- 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

[illegible]

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

b If "Yes," complete the following schedule

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	*****	2020-04-22	*****
	_____ Signature of officer or trustee	_____ Date	_____ Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	BJ HOFFMAN CPA		2020-04-22		P00172524
	Firm's name ▶ CITRIN COOPERMAN & COMPANY LLP				Firm's EIN ▶ 22-2428965
	Firm's address ▶ 1800 JFK BLVD 20TH FLOOR PHILADELPHIA, PA 19103				Phone no (215) 545-4800

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

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
AMGEN INC	P	1997-03-15	2019-09-04
BRISTOL MYERS	P	2019-09-04	2016-08-05
CANTEL MEDICAL CORP	P	2019-09-04	2013-03-08
MEDNAX INC	P	2019-08-22	2011-01-11
MONOTYPE IMAGING HOLDINGS	P	2019-10-14	2011-02-07
ZOETIS INC	P	2019-09-04	2014-02-11
PUTNAM ULTRA SHORT DURATION INCOME FUND CLASS A	P	2019-11-12	2019-01-22

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
30,707		8,625	22,082
62,350		74,611	-12,261
29,059		6,545	22,514
26,533		39,107	-12,574
64,513		55,346	9,167
50,913		11,707	39,206
143,588		143,421	167

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			22,082
			-12,261
			22,514
			-12,574
			9,167
			39,206
			167

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
HARVEY KAPLAN	DIRECTOR 35 00	0	0	0
6566 FRANCE AVENUE SO SUITE 701 EDINA, MN 55435				
MARJORIE KAPLAN	DIRECTOR 35 00	0	0	0
6566 FRANCE AVENUE SO SUITE 701 EDINA, MN 55435				
HELEN KAPLAN	SECRETARY 40 00	0	0	0
139 W 85TH STREET 5 NEW YORK, NY 10024				
LAURA KAPLAN	DIRECTOR 35 00	0	0	0
2828 SUNSET BLVD MINNEAPOLIS, MN 55416				
RACHEL KAPLAN	PRESIDENT 5 00	0	0	0
1714 W BYRON CHICAGO, IL 60613				
BOB RIESMAN	DIRECTOR 35 00	0	0	0
1714 W BYRON CHICAGO, IL 60613				
LEAH KAPLAN	VICE PRESIDENT 40 00	0	0	0
2117 PINE STREET PHILADELPHIA, PA 19103				
ROSS KAPLAN	TREASURER 2 00	0	0	0
2828 SUNSET BLVD MINNEAPOLIS, MN 55416				
JON SMOLLEN	DIRECTOR 35 00	0	0	0
2117 PINE STREET PHILADELPHIA, PA 19103				

Form 990PF Part XV Line 1a - 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).

HARVEY KAPLAN
MARJORIE KAPLAN
HELEN KAPLAN
LAURA KAPLAN
RACHEL KAPLAN
BOB RIESMAN
LEAH KAPLAN
ROSS KAPLAN
JON SMOLLEN

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALLIANCE OF HOPE FOR SUICIDE LOSS SURVIVORS POBOX 7005 EVANSTON, IL 60201		NC	JEWISH COMMUNITY	2,500
AMERICAN FOUNDATION FOR SUICIDE PREVENTION(AFSP) 120 WALL STREET 29TH FLOOR NEW YORK, NY 10005		NC	JEWISH SOCIAL SERVICES	2,500
AMERICAN JEWISH WORLD SERVICE 45 WEST 36TH STREET 11TH FLOOR NEW YORK, NY 10018		NC	JEWISH CULTURAL	8,500
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ANSHE EMET SYNAGOGUE 371 NORTH BROADWAY CHICAGO, IL 60613		NC	JEWISH RELIGIOUS ORGANIZATION	3,500
ANTI-DEFAMATION LEAGUE 605 THIRD AVENUE NEW YORK, NY 10158		NC	JEWISH SOCIAL SERVICES	8,000
ARK6450 NORTH CALIFORNIA AVENUE CHICAGO, IL 60645		NC	JEWISH SOCIAL SERVICES	15,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AVODAH125 MAIDEN LANE SUITE B NEW YORK, NY 10038		NC	JEWISH COMMUNITY ORGANIZATION	13,000
AZ CENTER FOR THE BLIND 3040 SOUTH 45TH STREET PHOENIX, AZ 85040		NC	MEDICAL	1,000
AZ TALKING BOOK LIBRARY 1030 NORTH 32ND STREET PHOENIX, AZ 85008		NC	EDUCATION	1,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BETH EL SYNAGOGUE 5225 BARRY STREET MINNEAPOLIS, MN 55416		NC	JEWISH RELIGIOUS ORGANIZATION	15,000
BIRTHRIGHT ISRAEL FOUNDATION PO BOX 21615 NEW YORK, NY 10087		NC	JEWISH COMMUNITY ORGANIZATION	10,000
BROWN UNIVERSITYPO BOX 1877 PROVIDENCE, RI 029121877		NC	EDUCATION	1,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CARING KIND (ALZHEIMER'S) 360 LEXINGTON AVENUE NEW YORK, NY 10017		NC	MEDICAL	5,000
CBST CONGREGATION BEIT SIMCHAT TORAH 130 WEST 30TH ST NEW YORK, NY 10014		NC	JEWISH RELIGIOUS ORGANIZATION	3,000
CHALLAH FOR HUNGER 201 S CAMAC ST FLOOR 2 PHILADELPHIA, PA 19107		NC	EMERGENCY FOOD AND SHELTER	2,500
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CITY MEALS ON WHEELS 355 LEXINGTON AVENUE NEW YORK, NY 10017		NC	EMERGENCY FOOD AND SHELTER	1,000
COMMON CAUSE EDUCATION FUND 805 15TH STREET NW SUITE 800 WASHINGTON, DC 20005		NC	EDUCATION	4,000
CONGREGATION OR TZION 9090 E BAHIA DR 106 SCOTTSDALE, AZ 85260		NC	JEWISH RELIGIOUS ORGANIZATION	1,160
Total ► 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CREATIVE GROWTH ART CENTER 355 24TH ST OAKLAND, CA 94612		NC	JEWISH CULTURAL	2,500
CURE ALZHEIMERS FUND 34 WASHINGTON ST SUITE 200 WELLESLEY, MA 02481		NC	MEDICAL	5,000
DOCTORS WITHOUT BORDERS USA 333 7TH AVE NEW YORK, NY 10001		NC	MEDICAL	3,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
DOROT171 W 85TH STREET NEW YORK, NY 10024		NC	JEWSH SOCIAL SERVICES	15,000
ENVIRONMENTAL INITIATIVE 211 1ST ST 250 MINNEAPOLIS, MN 55401		NC	OTHER	3,000
FISHER CENTER FOR ALZHEIMERS RESEARCH FOUNDATION 110 EAST 42ND ST 16TH FLOOR NEW YORK, NY 10017		NC	MEDICAL	2,500
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FRIENDS OF YERMIN ORDE 4340 EAST WEST HIGHWAY 202 BETHESDA, MD 20814		NC	JEWISH COMMUNITY ORGANIZATIONS	1,500
HADASSAH40 WALL STREET NEW YORK, NY 10005		NC	JEWISH COMMUNITY ORGANIZATION	4,000
HAIRTOSTAY2234 BEACH ST SAN FRANCISCO, CA 94123		NC	OTHER	1,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HAMEC10100 JAMISON AVE PHILADELPHIA, PA 19116		NC	JEWISH COMMUNITY ORGANIZATION	1,000
HEILICHER JEWISH DAY SCHOOL 4330 CEDAR LAKE RD MINNEAPOLIS, MN 55416		NC	JEWISH COMMUNITY ORGANIZATION	13,500
HIAS PA2100 ARCH STREET PHILADELPHIA, PA 19103		NC	OTHER	12,500
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ISRAEL GUIDE DOG968 EASTON RD WARRINGTON, PA 18976		NC	JEWISH COMMUNITY ORGANIZATION	1,000
JCC45 HAVERFORD ROAD WYNNEWOOD, PA 19096		NC	JEWISH COMMUNITY ORGANIZATION	4,700
JCHAI274 S BRYN MAWR AVE BRYN MAWR, PA 19010		NC	JEWISH SOCIAL SERVICES	2,500
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JDC (JOINT DISTRIBUTION COMMITTEE) PO BOX 4124 NEW YORK, NY 10163		NC	JEWISH COMMUNITY ORGANIZATION	3,000
JEVS HUMAN SERVICES 1845 WALNUT STREET 7TH FLOOR PHILADELPHIA, PA 19103		NC	JEWISH COMMUNITY ORGANIZATION	5,000
JEWISH COMMUNITY ACTION 2375 UNIVERSITY AVE STE 150 ST PAUL, MN 55114		NC	JEWISH COMMUNITY ORGANIZATION	1,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JEWISH COMMUNITY RELATIONS COUNCIL (JCRC) 12 N 12TH ST SUITE 480 MINNEAPOLIS, MN 55403		NC	JEWISH COMMUNITY ORGANIZATION	5,000
JEWISH COUNCIL ON URBAN AFFAIRS 610 S MICHIGAN AVE CHICAGO, IL 60605		NC	JEWISH SOCIAL SERVICES	2,500
JEWISH DAY SCHOOLS 2100 ARCH STREET PHILADELPHIA, PA 19103		NC	EDUCATION	2,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
JEWISH FAMILY & CHILDRENSERVICES OF MINNEAPOLIS(JFCS) 13100 WAYZATA BLVD STE 400 HOPKINS, MN 55305		NC	JEWISH COMMUNITY ORGANIZATION	19,000
JEWISH FEDERATION 2100 ARCH STREET PHILADELPHIA, PA 19103		NC	SOCIAL SERVICE	15,000
JEWISH FEDERATION OF MINNEAPOLIS 13100 WAYZATA BLVD SUITE 200 MINNETONKA, MN 55305		NC	JEWISH COMMUNITY ORGANIZATION	3,500
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JEWISH GENETIC DISEASES CENTER 12701 NO SCOTTSDALE RD 201 SCOTTSDALE, AZ 85254		NC	MEDICAL	10,000
JEWISH NATIONAL FUND 42 EAST 69TH STREET NEW YORK, NY 10021		NC	JEWISH CULTURAL	5,000
JEWISH RELIEF AGENCY 225 E CITY AVE SUITE 103 BALA CYNWYD, PA 19004		NC	JEWISH SOCIAL SERVICES	2,500
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JEWISH UNITED FUND 30 S WELLS STREET CHICAGO, IL 60606		NC	JEWISH COMMUNITY ORGANIZATION	7,000
JR MASTERMAN HOME AND SCHOOL ASSOCIATION 1699 SPRING GARDEN STREET PHILADELPHIA, PA 19130		NC	EDUCATION	15,000
KAISERMAN JCC - MACCABI 45 HAVERFORD ROAD WYNNEWOOD, PA 19096		NC	OTHER	3,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
KESHET284 ARMORY ST JAMAICA PLAIN, MA 02130		NC	JEWISH COMMUNITY ORGANIZATION	2,000
MASORTI FOUNDATION 475 RIVERSIDE DRIVE SUITE 832 NEW YORK, NY 10115		NC	RELIGIOUS	1,500
MAZON 10850 WILSHIRE BLVD SUITE 400 LOS ANGELES, CA 90024		NC	JEWISH COMMUNITY ORGANIZATION	2,500
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MET COUNCIL ON JEWISH POVERTY 120 BROADWAY 7TH FLOOR NEW YORK, NY 102710015		NC	JEWISH RELIGIOUS ORGANIZATION	1,000
MISHKAN CHICAGO 4001 N RAVENSWOOD AVENUE CHICAGO, IL 60613		NC	CULTURAL ENRICHMENT	2,500
MN ENVIRONMENTAL PARTNERSHIP 546 RICE STREET ST PAUL, MN 55103		NC	OTHER	2,900
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MN SERVICES FOR THE BLIND 2200 UNIVERSITY AVENUE W SUITE 240 ST PAUL, MN 55114		NC	EDUCATION	1,000
NAMI MN 1919 UNIVERSITY AVENUE W SUITE 400 ST PAUL, MN 55104		NC	OTHER	5,000
NATIONAL MUSEUM OF AMERICAN JEWISH HISTORY 101 S INDEPENDENCE MALL E PHILADELPHIA, PA 19106		NC	JEWISH CULTURAL	1,500
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NECHAMA4330 CEDAR LAKE RD MINNEAPOLIS, MN 54416		NC	EMERGENCY FOOD AND SHELTER	3,500
NEW ISRAEL FUNDPO BOX 96712 WASHINGTON, DC 200777438		NC	JEWISH COMMUNITY ORGANIZATION	16,000
NEW YORK CARES 65 BROADWAY 19TH FLOOR NEW YORK, NY 10006		NC	COMMUNITY SOCIAL SERVICES	3,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NEW YORK PUBLIC THEATER 425 LAFAYETTE STREET NEW YORK, NY 10003		NC	CULTURAL EDUCATION	500
NORTH PARK ELEMENTARY SCHOOL 5378 N H ST SAN BERNARDINO, CA 92407		NC	OTHER	2,500
PJ LIBRARY67 HUNT STREET SUITE 100 AGAWAM, MA 01001		NC	JEWISH CULTURAL ENRICHMENT	3,500
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PLANNED PARENTHOOD 434 WEST 33RD STREET NEW YORK, NY 10001		NC	MEDICAL	3,000
SHALVAPOBOX 46375 CHICAGO, IL 606460375		NC	JEWISH SOCIAL SERVICES	2,500
SHARSHERET1086 TEANECK RD 2G TEANECK, NJ 07666		NC	JEWISH COMMUNITY ORGANIZATION	1,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SOUTHERN POVERTY LAW CENTER 400 WASHINGTON AVENUE PO BOX 5632 MONTGOMERY, AL 36104		NC	OTHER	2,000
STEP6812 WEST LAKE ST ST LOUIS PARK, MN 55426		NC	OTHER	2,000
TEMPLE BETH ZION BETH ISRAEL 300 S 18TH ST PHILADELPHIA, PA 19103		NC	JEWISH COMMUNITY ORGANIZATION	13,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE BLAKE SCHOOL ANNUAL FUND 511 KENWOOD PARKWAY MINNEAPOLIS, MN 55403		NC	EDUCATION	1,000
THE BLUE CARD 171 MADISON AVE SUITE1405 NEW YORK, NY 10016		NC	JEWISH CULTURAL	2,500
THE FLAMEPO BOX 590359 SAN FRANCISCO, CA 94159		NC	ISRAELI EDUCATION	2,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TIMESLIPS CREATIVE STORYTELLING 4461 N LAKE DR MILWAUKEE, WI 53211		NC	EDUCATION	1,000
TIVNU7971 SE 11TH AVE PORTLAND, OR 97202		NC	JEWISH COMMUNITY ORGANIZATION	1,000
UJA- FEDERATION OF NY 130 EAST 59TH STREET NEW YORK, NY 10022		NC	JEWISH COMMUNITY ORGANIZATION	6,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNION OF CONCERNED SCIENTISTS 2 BRATTLE SQUARE CAMBRIDGE, MA 021383780		NC	OTHER	4,000
UNITED STATES HOLOCAUST 100 RAOUL WALLENBURG PL SW WASHINGTON, DC 20024		NC	JEWISH COMMUNITY ORGANIZATION	1,500
WORLD JEWISH CONGRESS 501 MADISON AVENUE NEW YORK, NY 10022		NC	JEWISH COMMUNITY ORGANIZATION	2,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AUSCHWITZ-BIRKENAU 483 10TH AVENUE SUITE 425 NEW YORK, NY 10018		NC	OTHER	5,000
BETH TORAH SYNAGOGUE 6100 W 127TH ST OVERLAND PARK, IL 66209		NC	JEWISH COMMUNITY ORGANIZATION	1,000
ILLINOIS HOLOCAUST MUSEUM 9603 WOODS DR SKOKIE, IL 60077		NC	JEWISH COMMUNITY ORGANIZATION	2,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
JEWISH AGENCY FOR ISRAEL NORTH 633 3RD AVE NEW YORK, NY 10017		NC	JEWISH COMMUNITY ORGANIZATION	1,000
JHSUM JEWISH HISTORICAL 4330 CEDAR LAKE RD MINNEAPOLIS, MN 55416		NC	JEWISH COMMUNITY ORGANIZATION	1,000
LUMOS FOUNDATION557 BROADWAY NEW YORK, NY 10012		NC	OTHER	500
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MINNESOTA PUBLIC RADIO 480 CEDAR STREET SAINT PAUL, MN 55101		NC	OTHER	300
PARK NICOLLET FOUNDATION 8170 33RD AVE S BLOOMINGTON, MN 55425		NC	OTHER	1,000
POST-POST OFFICE2828 SUNSET BLVD MINNEAPOLIS, MN 55416		NC	OTHER	12,000
Total ▶ 3a				386,560

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE JEWISH BOARD135 WEST 50TH ST NEW YORK, NY 10020		NC	JEWISH COMMUNITY ORGANIZATION	200
THE NATIONAL PARK FOUNDATION 1110 VERMONT AVE NW WASHINGTON, DC 20005		NC	OTHER	100
WIN ONE STATE STREET PLAZA 18TH FLOOR NEW YORK, NY 10004		NC	OTHER	200
Total ▶ 3a				386,560

TY 2019 Accounting Fees Schedule**Name:** KAPLAN FAMILY FOUNDATION**EIN:** 41-1794327

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	3,038	3,038		0

TY 2019 Investments Corporate Stock Schedule**Name:** KAPLAN FAMILY FOUNDATION**EIN:** 41-1794327**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
VARIOUS CORPORATE STOCK	1,766,669	8,153,154

TY 2019 Other Decreases Schedule

Name: KAPLAN FAMILY FOUNDATION

EIN: 41-1794327

Description	Amount
COST ADJUSTMENTS	75,265

TY 2019 Other Expenses Schedule**Name:** KAPLAN FAMILY FOUNDATION**EIN:** 41-1794327**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE FILING FEES	25	25		0
OFFICE EXPENSES	740	740		0

TY 2019 Other Professional Fees Schedule**Name:** KAPLAN FAMILY FOUNDATION**EIN:** 41-1794327

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MANAGEMENT FEES #UBS 09885	28,017	28,017		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Go to <u>www.irs.gov/Form990</u> for the latest information	OMB No 1545-0047 2019
Name of the organization KAPLAN FAMILY FOUNDATION		Employer identification number 41-1794327

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . ▶ \$ _____

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

Name of organization
KAPLAN FAMILY FOUNDATIONEmployer identification number
41-1794327**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	HELEN KAPLAN FGJ NY, NY 10024	\$ 75,132	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)

Name of organization KAPLAN FAMILY FOUNDATION	Employer identification number 41-1794327
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Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	600 SHARES OF PROCTER & GAMBLE	\$ 75,132	2019-12-23
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	

Name of organization KAPLAN FAMILY FOUNDATION	Employer identification number 41-1794327
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____ _____	_____ _____ _____	_____ _____ _____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	_____ _____ _____	_____ _____ _____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____ _____	_____ _____ _____	_____ _____ _____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	_____ _____ _____	_____ _____ _____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____ _____	_____ _____ _____	_____ _____ _____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	_____ _____ _____	_____ _____ _____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____ _____	_____ _____ _____	_____ _____ _____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	_____ _____ _____	_____ _____ _____	