

Form 990-PF

Department of the Treasury  
Internal Revenue Service

EXTENDED TO NOVEMBER 16, 2020

## 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 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning

, and ending

Name of foundation <b>ROBERTA &amp; STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON &amp; STORRS</b>		A Employer identification number <b>46-2956417</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>400 ATLANTIC AVENUE</b>	Room/suite	B Telephone number <b>617-482-1776</b>
City or town, state or province, country, and ZIP or foreign postal code <b>BOSTON, MA 02110-3331</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 4,223.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part II Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	1,444,333.		N/A	
2	(Check <input type="checkbox"/> if the foundation is not required to attach Sch. B)				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	76.	76.		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10				
b	Gross sales less return on all assets on line 6a				
7	Capital gain net income (from Part IV, line 2)		0.		
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)				
11	Other income				
12	Total. Add lines 1 through 11	1,444,409.	76.	Internal Revenue Service Received US Bank	0.
13	Compensation of officers, directors, trustees, etc.	0.	0.	303	0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees STMT 1	10,932.	38.	NOV 23 2020	0.
b	Accounting fees STMT 2	3,600.	38.	Ogden, UT	0.
c	Other professional fees				
17	Interest				
18	Taxes STMT 3	250.	0.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses				
24	Total operating and administrative expenses. Add lines 13 through 23	14,782.	76.		0.
25	Contributions, gifts, grants paid	1,429,333.			1,429,333.
26	Total expenses and disbursements. Add lines 24 and 25	1,444,115.	76.		1,429,333.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	294.			
b	Net investment income (if negative, enter -0-)		0.		
c	Adjusted net income (if negative, enter -0-)			N/A	

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Part III Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	3.	3.	3.
	2 Savings and temporary cash investments	3,926.	4,220.	4,220.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis ▶		
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		3,929.	4,223.	4,223.
17 Accounts payable and accrued expenses				
18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/>			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/>			
	26 Capital stock, trust principal, or current funds	3,929.	4,223.	
27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
28 Retained earnings, accumulated income, endowment, or other funds	0.	0.		
29 Total net assets or fund balances	3,929.	4,223.		
30 Total liabilities and net assets/fund balances	3,929.	4,223.		

## 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	3,929.
2 Enter amount from Part I, line 27a	2	294.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	4,223.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	4,223.

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**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a</b>			
<b>b</b> NONE			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

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

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

  

**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**

**3** Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):  
If gain, also enter in Part I, line 8, column (c).  
If (loss), enter -0- in Part I, line 8 } **3**

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	494,191.	2,947.	167.692908
2017	1,350,000.	4,132.	326.718296
2016	2,025,003.	3,038.	666.557933
2015	1,495,000.	2,851.	524.377411
2014	550,000.	967.	568.769390

**2** Total of line 1, column (d)**2** 2,254.115938**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** 450.823188**4** Enter the net value of noncharitable-use assets for 2019 from Part X, line 5**4** 3,568.**5** Multiply line 4 by line 3**5** 1,608,537.**6** Enter 1% of net investment income (1% of Part I, line 27b)**6** 0.**7** Add lines 5 and 6**7** 1,608,537.**8** Enter qualifying distributions from Part XII, line 4**8** 1,429,333.If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.  
See the Part VI instructions.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ 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

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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)

5 **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2019 estimated tax payments and 2018 overpayment credited to 2019

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

7 Total credits and payments. Add lines 6a through 6d

8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached

9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed**

10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**

11 Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ☐

**Refunded** ☐

**Part VII-A Statements Regarding Activities**

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?

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c Did the foundation file Form 1120-POL for this year?

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.

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

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

b If "Yes," has it filed a tax return on Form 990-T for this year?

N/A

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

If "Yes," attach the statement required by General Instruction T

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?

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

8a Enter the states to which the foundation reports or with which it is registered. See instructions. ☐

MA

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

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		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		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <b>N/A</b>	X	
14 The books are in care of <b>GOULSTON &amp; STORRS P.C.</b> Telephone no. <b>617-482-1776</b> Located at <b>400 ATLANTIC AVENUE, BOSTON, MA</b> ZIP+4 <b>02110</b>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		X

**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.

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

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

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

N/A

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?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870.

☐ Yes ☒ No

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

N/A

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?

☐ Yes ☒ No

	Yes	No
5a		
5b		
6a		
6b		X
7a		
7b		
8		

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 5		0.	0.	0.

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

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

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

0

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	0.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	3,622.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	0.
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	3,622.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	3,622.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	54.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	3,568.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	178.

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

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	178.
<b>2a</b>	Tax on investment income for 2019 from Part VI, line 5	<b>2a</b>	
<b>b</b>	Income tax for 2019. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	0.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	178.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	178.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	178.

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	1,429,333.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	1,429,333.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	0.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	1,429,333.

**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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**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				178.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2019				
a From 2014	549,952.			
b From 2015	1,494,857.			
c From 2016	2,024,851.			
d From 2017	1,349,793.			
e From 2018	494,044.			
f Total of lines 3a through e	5,913,497.			
4 Qualifying distributions for 2019 from Part XII, line 4. ► \$ 1,429,333.				
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				178.
e Remaining amount distributed out of corpus	1,429,155.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (e))	0.			0.
6 Enter the net total of each column as indicated below:	7,342,652.			
a Corpus: Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				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	549,952.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	6,792,700.			
10 Analysis of line 9				
a Excess from 2015	1,494,857.			
b Excess from 2016	2,024,851.			
c Excess from 2017	1,349,793.			
d Excess from 2018	494,044.			
e Excess from 2019	1,429,155.			

## ROBERTA &amp; STEPHEN R. WEINER FAMILY FOUND

Form 990-PF (2019)

C/O ALAN W. ROTTENBERG GOULSTON &amp; STORRS

46-2956417

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

N/A

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

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

**b** 85% of line 2a

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

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

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

Subtract line 2d from line 2c

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

**a** "Assets" alternative test - enter:

(1) Value of all assets

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

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

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

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

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

(3) Largest amount of support from an exempt organization

(4) Gross investment income

**Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)****1 Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

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

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

**c** Any submission deadlines:

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

## ROBERTA &amp; STEPHEN R. WEINER FAMILY FOUND

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**Part XV** **Supplementary Information** (continued)

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
BOYS & GIRLS CLUBS OF BOSTON - CASH \$6,709; STOCK \$43,291 200 HIGH STREET, SUITE 3B BOSTON, MA 02110	NONE		IN FURTHERANCE OF ITS CHARITABLE PURPOSE/MISSION	50,000.
BRANDEIS UNIVERSITY- CASH \$2,996; STOCK \$30,337 415 SOUTH STREET, MS126 WALTHAM, MA 02454	NONE		IN FURTHERANCE OF ITS CHARITABLE PURPOSE/MISSION	33,333.
BRIGHAM AND WOMEN'S HOSPITAL - CASH \$34,481; STOCK \$485,520 116 HUNTINGTON AVENUE, 3RD FLOOR BOSTON, MA 02116	NONE		IN FURTHERANCE OF ITS CHARITABLE PURPOSE/MISSION	520,001.
CAMP HARBOR VIEW FOUNDATION, INC. - CASH \$3,738; STOCK \$231,262 200 CLARENDON ST 60TH FLOOR BOSTON, MA 02116	NONE		IN FURTHERANCE OF ITS CHARITABLE PURPOSE/MISSION	235,000.
COMBINED JEWISH PHILANTHROPIES - CASH \$44,121; STOCK \$130,879 126 HIGH STREET BOSTON, MA 02110	NONE		IN FURTHERANCE OF ITS CHARITABLE PURPOSE/MISSION	175,000.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>		<b>3a</b>	<b>1,429,333.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			<b>3b</b>	<b>0.</b>

Form 990-PF (2019)

ROBERTA & STEPHEN R. WEINER FAMILY FOUND  
C/O ALAN W. ROTTENBERG GOULSTON & STORRS

46-2956417

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
DANA-FARBER CANCER INSTITUTE - CASH \$3,165; STOCK \$46,835 220 SUNRISE AVENUE, SUITE 204 PALM BEACH, FL 33480	NONE		IN FURTHERANCE OF ITS CHARITABLE PURPOSE/MISSION	50,000.
MASSCHUSETTS GENERAL HOSPITAL CANCER CENTER - CASH \$1,826; STOCK \$98,174 125 NASHA STREET BOSTON, MA 02114	NONE		IN FURTHERANCE OF ITS CHARITABLE PURPOSE/MISSION	100,000.
MUSEUM OF FINE ARTS BOSTON - CASH \$720; STOCK \$39,280 465 HUNTINGTON AVENUE BOSTON, MA 02115	NONE		IN FURTHERANCE OF ITS CHARITABLE PURPOSE/MISSION	40,000.
NOBLE AND GREENOUGH SCHOOL - CASH \$2,944; STOCK \$97,056 10 CAMPUS DRIVE DEDHAM, MA 02026	NONE		IN FURTHERANCE OF ITS CHARITABLE PURPOSE/MISSION	100,000.
SCHOLAR ATHLETES INC - CASH \$3,911; STOCK \$112,088 57 MAGAZINE STREET BOSTON, MA 02119	NONE		IN FURTHERANCE OF ITS CHARITABLE PURPOSE/MISSION	115,999.
UNICEF USA - CASH \$10,000 18 TREMONT STREET, SUITE 820 BOSTON, MA 02108	NONE		IN FURTHERANCE OF ITS CHARITABLE PURPOSE/MISSION	10,000.
Total from continuation sheets				415,999.

**Part XVI-A Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income	
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount			
1 Program service revenue:							
a _____							
b _____							
c _____							
d _____							
e _____							
f _____							
g Fees and contracts from government agencies							
2 Membership dues and assessments							
3 Interest on savings and temporary cash investments							
4 Dividends and interest from securities			14	76.			
5 Net rental income or (loss) from real estate:							
a Debt-financed property							
b Not debt-financed property							
6 Net rental income or (loss) from personal property							
7 Other investment income							
8 Gain or (loss) from sales of assets other than inventory							
9 Net income or (loss) from special events							
10 Gross profit or (loss) from sales of inventory							
11 Other revenue:							
a _____							
b _____							
c _____							
d _____							
e _____							
12 Subtotal. Add columns (b), (d), and (e)		0.		76.			0.
13 Total. Add line 12, columns (b), (d), and (e)						13	76.

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

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

[illegible]

## 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?   |  | Yes | No |
|--|--|-----|----|
| a Transfers from the reporting foundation to a noncharitable exempt organization of:   |  |     |    |
| (1) Cash   |  |     | X  |
| (2) Other assets   |  |     | X  |
| b Other transactions:  |  |     |    |
| (1) Sales of assets to a noncharitable exempt organization   |  |     | X  |
| (2) Purchases of assets from a noncharitable exempt organization   |  |     | X  |
| (3) Rental of facilities, equipment, or other assets   |  |     | X  |
| (4) Reimbursement arrangements   |  |     | X  |
| (5) Loans or loan guarantees   |  |     | X  |
| (6) Performance of services or membership or fundraising solicitations   |  |     | X  |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees   |  |     | X  |
| 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
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 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.

   
 Signature of officer or trustee

**▶ TRUSTEE**

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

☒ Yes ☐ No

Print/Type preparer's name

DOUGLAS FARRINGTON

Firm's name ► **MARCUM LLP**

Firm's address ► 53 STATE STREET  
BOSTON, MA 02109

Preparator's signature

Preparator's signature

Date \_\_\_\_\_

10/29/20

Check ☐  
self-employed

PTIN

P00370668

Firm's EIN ► 11-1986323

Phone no. (617) 807-5000

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

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

**2019**

Name of the organization

ROBERTA & STEPHEN R. WEINER FAMILY FOUND  
C/O ALAN W. ROTTENBERG GOULSTON & STORRS

Employer identification number

46-2956417

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

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

**Special Rules**

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

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

Name of organization ROBERTA & STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON & STORRS	Employer identification number 46-2956417
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**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	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 92,468.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 46,835.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
3	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 48,444.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
4	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 29,665.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
5	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 69,266.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
6	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 97,056.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)



Name of organization ROBERTA & STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON & STORRS	Employer identification number 46-2956417
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**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
7	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 51,229.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
8	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 108,013.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
9	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 162,206.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
10	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 64,559.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
11	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 99,513.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
12	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 98,748.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization <b>ROBERTA &amp; STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON &amp; STORRS</b>	Employer identification number <b>46-2956417</b>
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**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
13	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 43,291.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
14	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 39,280.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
15	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 13,166.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
16	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 17,171.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
17	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 16,677.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
18	ROBERTA S. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 48,370.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization <b>ROBERTA &amp; STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON &amp; STORRS</b>	Employer identification number <b>46-2956417</b>
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**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
19	MELISSA WEINER JANFAZA C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 17,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
20	ADAM J. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 19,643.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
21	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 33,583.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
22	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 56,232.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
23	ADAM J. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 13,067.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
24	ADAM J. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 15,119.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization ROBERTA & STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON & STORRS	Employer identification number 46-2956417
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**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
25	ADAM J. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 6,071.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
26	ADAM J. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 11,516.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
27	ADAM J. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 3,390.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
28	ADAM J. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 6,693.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
29	STEPHEN R. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 49,730.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
30	ROBERTA S. WEINER C/O GOULSTON & STORRS, PC., 400 ATLANTIC AVENUE  BOSTON, MA 02110-3333	\$ 65,832.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization <b>ROBERTA &amp; STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON &amp; STORRS</b>	Employer identification number <b>46-2956417</b>
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**Part II** **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
<u>2</u>	ALPHABET INC CLASS STOCK; 44 SHS; COST \$13,816	\$ <u>46,835.</u>	<u>01/10/19</u>
<u>3</u>	ALPHABET INC CLASS STOCK; 43 SHS; COST \$15,605	\$ <u>48,444.</u>	<u>02/14/19</u>
<u>4</u>	ANALOG DEVICES INC; 260 SHS; COST \$13,416	\$ <u>29,665.</u>	<u>04/29/19</u>
<u>5</u>	PAYPAL HOLDING INC.; 620 SHS; COST \$24,661	\$ <u>69,266.</u>	<u>04/29/19</u>
<u>6</u>	WASTE MANAGEMENT INC.; 913 SHS; COST \$43,783	\$ <u>97,056.</u>	<u>04/29/19</u>
<u>7</u>	APPLE COMPUTER INC. 250 SHS; COST \$15,255	\$ <u>51,229.</u>	<u>04/20/19</u>

Name of organization <b>ROBERTA &amp; STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON &amp; STORRS</b>	Employer identification number <b>46-2956417</b>
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**Part II** **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
<u>8</u>	COMCAST CORPORATION CL A 2,500 SHS; COST \$86,886 _____ _____ _____	\$ <u>108,013.</u>	<u>04/20/19</u>
<u>9</u>	MICROSOFT CORPORATION STOCK; 1,250 SHS; COST \$140,162 _____ _____ _____	\$ <u>162,206.</u>	<u>04/20/19</u>
<u>10</u>	BOOZ ALLEN HAMILTON; 1,100 SHS; COST \$26,926 _____ _____ _____	\$ <u>64,559.</u>	<u>04/20/19</u>
<u>11</u>	PFIZER INC. 2,500 SHS; COST \$54,810 _____ _____ _____	\$ <u>99,513.</u>	<u>04/20/19</u>
<u>12</u>	PAYPAL HOLDING INC.; 900 SHS; COST \$34,612 _____ _____ _____	\$ <u>98,748.</u>	<u>04/25/19</u>
<u>13</u>	XILINX INC.; 358 SHS; COST \$11,185 _____ _____ _____	\$ <u>43,291.</u>	<u>04/25/19</u>

Name of organization <b>ROBERTA &amp; STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON &amp; STORRS</b>	Employer identification number <b>46-2956417</b>
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**Part II** **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
<u>14</u>	PAYPAL HOLDING INC.; 358 SHS; COST \$14,280 _____ _____ _____	\$ <u>39,280.</u>	<u>04/25/19</u>
<u>15</u>	PAYPAL HOLDING INC.; 120 SHS; COST \$4,787 _____ _____ _____	\$ <u>13,166.</u>	<u>04/25/19</u>
<u>16</u>	XILINX INC.; 142 SHS; COST \$4,437 _____ _____ _____	\$ <u>17,171.</u>	<u>04/25/19</u>
<u>17</u>	PAYPAL HOLDING INC.; 152 SHS; COST \$5,948 _____ _____ _____	\$ <u>16,677.</u>	<u>04/25/19</u>
<u>18</u>	XILINX INC.; 400 SHS; COST \$12,497 _____ _____ _____	\$ <u>48,370.</u>	<u>04/25/19</u>
<u>21</u>	MICROSOFT CORPORATION STOCK; 245 SHS; COST \$4,321 _____ _____ _____	\$ <u>33,583.</u>	<u>07/17/19</u>

Name of organization <b>ROBERTA &amp; STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON &amp; STORRS</b>	Employer identification number <b>46-2956417</b>
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**Part II** **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
22	COMCAST CORPORATION CL A 1,300 SHS; COST \$11,235   	\$ 56,232.	08/13/19
23	AMERICAN TOWER CORPORATION; 59 SHS; COST \$7,220   	\$ 13,067.	08/13/19
24	CISCO SYSTEM INC.; 290 SHS; COST \$6,183   	\$ 15,119.	08/13/19
25	DARDEN RESTAURANTS INC.; 50 SHS; COST \$3,683   	\$ 6,071.	08/13/19
26	IAA INC.; 250 SHS; COST \$6,428   	\$ 11,516.	08/13/19
27	KAR AUCTION SERVICE INC.; 135 SHS; COST \$2,157   	\$ 3,390.	08/13/19



Name of organization <b>ROBERTA &amp; STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON &amp; STORRS</b>	Employer identification number <b>46-2956417</b>
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**Part II** **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
28	NEXTERA ENERGY INC.; 31 SHS; COST \$3,573	\$ 6,693.	08/13/19
29	MARKETAXESS HOLDINGS; 132 SHS; COST \$6,607	\$ 49,730.	12/17/19
30	PAYPAL HOLDING INC.; 600 SHS; COST \$23,933	\$ 65,832.	04/25/19
		\$	
		\$	
		\$	

Name of organization <b>ROBERTA &amp; STEPHEN R. WEINER FAMILY FOUND C/O ALAN W. ROTTENBERG GOULSTON &amp; STORRS</b>	Employer identification number <b>46-2956417</b>
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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 info once) ▶ \$ \_\_\_\_\_

Use duplicate copies of Part III if additional space is needed

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

FORM 990-PF	LEGAL FEES		STATEMENT 1	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	10,932.	38.		0.
TO FM 990-PF, PG 1, LN 16A	10,932.	38.		0.

FORM 990-PF	ACCOUNTING FEES		STATEMENT 2	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION	3,600.	38.		0.
TO FORM 990-PF, PG 1, LN 16B	3,600.	38.		0.

FORM 990-PF	TAXES		STATEMENT 3	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MA 2018 FORM PC	250.	0.		0.
TO FORM 990-PF, PG 1, LN 18	250.	0.		0.

FORM 990-PF

LIST OF SUBSTANTIAL CONTRIBUTORS  
PART VII-A, LINE 10

STATEMENT 4

NAME OF CONTRIBUTORADDRESS

ROBERTA S. WEINER

C/O GOULSTON & STORRS, P.C., 400 ATLANTIC  
AVENUE  
BOSTON, MA 02116

STEPHEN R. WEINER

C/O GOULSTON & STORRS, P.C., 400 ATLANTIC  
AVENUE  
BOSTON, MA 02116

ADAM J. WEINER

C/O GOULSTON & STORRS, P.C., 400 ATLANTIC  
AVENUE  
BOSTON, MA 02116

MELISSA WEINER JANFAZA

C/O GOULSTON & STORRS, P.C., 400 ATLANTIC  
AVENUE  
BOSTON, MA 02116

FORM 990-PF

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

STATEMENT 5

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
STEPHEN R. WEINER C/O GOULSTON & STORRS, 400 ATLANTIC AVENUE BOSTON, MA 02110	TRUSTEE 2.00	0.	0.	0.
ROBERTA S. WEINER C/O GOULSTON & STORRS, 400 ATLANTIC AVENUE BOSTON, MA 02110	TRUSTEE 2.00	0.	0.	0.
MELISSA WEINER JANFAZA C/O GOULSTON & STORRS, 400 ATLANTIC AVENUE BOSTON, MA 02110	TRUSTEE 2.00	0.	0.	0.
ADAM J. WEINER C/O GOULSTON & STORRS, 400 ATLANTIC AVENUE BOSTON, MA 02110	TRUSTEE 2.00	0.	0.	0.
ALAN W. ROTTENBERG C/O GOULSTON & STORRS, 400 ATLANTIC AVENUE BOSTON, MA 02110	TRUSTEE 2.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

## GENERAL EXPLANATION

## STATEMENT 6

## FORM/LINE IDENTIFIER

FORM 990-PF, PART XV, LINE 3A

## EXPLANATION:

1. CAMP HARBOR VIEW FOUNDATION  
200 CLARENDON STREET, 60TH FLOOR  
BOSTON, MA 02116  
CASH - \$3,738  
ANALOG DEVICES INC STOCK - 260 SHS / FMV - \$29,665 / BOOK  
VALUE - \$13,416  
PAYPAL HOLDINGS INC. - 620 SHS / FMV - \$69,266 / BOOK  
VALUE - \$24,661  
PAYPAL HOLDINGS INC. - 900 SHS / FMV - \$98,748 / BOOK  
VALUE - \$34,612  
MICROSOFT CORPORATION - 245 SHS / FMV - \$33,583 / BOOK  
VALUE - \$4,321
2. BRANDEIS UNIVERSITY  
415 SOUTH STREET, MS126  
WALTHAM, MA 02454  
CASH - \$2,996  
PAYPAL HOLDINGS INC. - 120 SHS / FMV - \$13,166 / BOOK VALUE  
- \$4,787  
XILINX INC. - 142 SHS / FMV - \$17,171 / BOOK VALUE - \$4,437
3. SCHOLAR ATHLETES INC  
57 MAGAZINE STREET  
BOSTON, MA 02119  
CASH - \$3,911  
COMCAST CORPORATION CL A -1,300 SHS / FMV - \$56,232 / BOOK  
VALUE - \$11,235  
AMERICAN TOWER CORPORATION - 59 SHS / FMV - \$13,067 / BOOK  
VALUE - \$7,220  
CISCO SYSTEM INC. - 290 SHS / FMV - \$15,119 / BOOK VALUE -  
\$8,936  
DARDEN RESTAURANTS INC. - 50 SHS / FMV - \$6,071 / BOOK  
VALUE - \$3,683  
IAA INC. - 250 SHS / FMV - \$11,516 / BOOK VALUE - \$6,428  
KAR AUCTION SERVICES, INC. - 135 SHS / FMV - \$3,390 / BOOK  
VALUE - \$2,157  
NEXTERA ENERGY INC. - 31 SHS / FMV - \$6,693 / BOOK VALUE -  
\$3,573
4. MUSEUM OF FINE ARTS BOSTON  
465 HUNTINGTON AVENUE  
BOSTON, MA 02115  
CASH - \$720  
PAYPAL HOLDINGS INC. - 358 SHS / FMV - \$39,280 / BOOK  
VALUE - \$14,280
5. DANA-FARBER CANCER INSTITUTE

220 SUNRISE AVENUE, SUITE 204  
PALM BEACH, FL 33480

CASH - \$3,165

ALPHABET INC CLASS STOCK - 44 SHS / FMV - \$46,835 / BOOK  
VALUE - \$13,816

6. MASSCHUSETTS GENERAL HOSPITAL CANCER

125 NASHUA STREET

BOSTON, MA 02114

CASH - \$1,826

ALPHABET INC CLASS STOCK - 43 SHS / FMV - \$48,444 / BOOK  
VALUE - \$15,605

MARKETAXESS HOLDINGS - 132 SHS / FMV - \$49,730 / BOOK  
VALUE - \$6,607

7. NOBEL AND GREENOUGH SCHOOL

10 CAMPUS DRIVE

DEDHAM, MA 02026

CASH - \$2,944

WASTE MANAGEMENT INC. - 913 SHS / FMV - \$97,056 / BOOK  
VALUE - \$43,783

8. BRIGHAM AND WOMEN'S HOSPITAL

116 HUNTINGTON AVENUE, 3RD FLOOR

BOSTON, MA 02116

CASH - \$34,481

APPLE COMPUTER INC. - 250 SHS / FMV - \$51,229 / BOOK  
VALUE - \$15,255

COMCAST CORPORATION CL A - 2,500 SHS / FMV - \$108,013 /  
BOOK VALUE - \$21,127

MICROSOFT CORPORATION - 1,250 SHS / FMV - \$162,206 / BOOK  
VALUE - \$22,044

BOOZ ALLEN AMILTON - 1,100 SHS / FMV - \$64,559 / BOOK  
VALUE - \$37,633

PFIZER INC. - 2,500 SHS / FMV - \$99,513 / BOOK VALUE -  
\$42,703

9. BOYS & GIRLS CLUBS OF BOSTON

200 HIGH, SUITE 3B

BOSTON, MA 02110

CASH - \$6,709

XILINX INC. - 358 SHS / FMV - \$43,291 / BOOK VALUE -  
\$11,185

10. COMBINED JEWISH PHILANTHROPIES

126 HIGH STREET,

BOSTON, MA 02110

CASH - \$44,121

PAYPAL HOLDINGS INC. - 752 SHS / FMV - \$82,509 / BOOK VALUE  
- \$29,881

XILINX INC. - 400 SHS / FMV - \$48,370 / BOOK VALUE -  
\$12,497

11. UNICEF USA

18 TREMONT STREET, SUITE 820

BOSTON, MA 02108

CASH - \$10,000