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Form 990-PF

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

OMB No 1545 0047

2019

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

Open to Public Inspection

	For ca	lenda	r year 2019 or ta	ax year beginnir	ig _	, 2019	, and ending		<u></u>	
	D		. 3 7	Ch Ch	l. 1			Α	Employer identification nui	mber
	Russ Foun		and Jane	Stern Char	ıtabı	.e		В	46-3259132 Telephone number (see inst	tructions)
	6340	SE	Harbor Ci:						772-225-2677	
	Stua	rt,	FL 34996-	1921				C	If exemption application is	pending, check here
	G Ch	eck a	II that apply	Initial return		Initial return of a forr	mer public charity	D	1 Foreign organizations, chec	ck here
			ļ	Final return		Amended return			2 Foreign organizations meet	ب
	H Ch	ack to	pe of organization	Address char		Name change 1(c)(3) exempt private t	foundation C		here and attach computation	
		_	ction 4947(a)(1)	10.01		· · · · <u>—</u>	private foundation	Ε	If private foundation status	was terminated
		marke	et value of all assets	at end of year		counting method X C			under section 507(b)(1)(A)	, check here
	•		II, column (c), line 1	•		Other (specify)		F	If the foundation is in a 60	
	► \$ Part		4,288		(Part I,	column (d), must be on	cash basis)		under section 507(b)(1)(B)	, check here.
	Part		nalysis of Re xpenses (The		s in	(a) Revenue and	(b) Net investmer	nt	(c) Adjusted net	(d) Disbursements for charitable
		CC	olumns (b), (c), a ecessarily equal	and (d) may not	•	expenses per books	income		income	purposes
_		CC	olumn (a) (see ins	tructions).)	_	_			<u> </u>	(cash basis only)
١		1		s, etc., received (attach sch	-			•		
1		2	Check ► X if the fou	indation is not required to	ittach Sch B		·			
		3		emporary cash investments.		3,458.	3,45			
		4	Dividends and intere Gross rents	est from securities		150,276.	150,27	6.		••;
			Net rental income)			<u> </u>
7			or (loss) Net gain or (loss) from sa			-26,016.		_		
77	3	1	Gross sales price for assets on line 6a	^{rall} 2,059,	273.					
~	Revenue	8	Capital gain net inco Net short-term capital	ome (from Part IV, lin	e 2)			0.	ļI	······································
	Ą	9	Income modification	•						• •
Z	_	10 a	Gross sales less returns and	1						
JAN 1 2 2022		١,	allowances Less Cost of	<u> </u>					 	
_]	goods sold. Gross profit or (loss) (atta	ach schedule)					 	
<u>II</u>			Other income (attack						 	
Ş										
		12	Total Add lines 1 th			127,718.	153,73	4.	0.	
られること	XS	14	Other employee sala	icers, directors, truste aries and wages	es, etc					
7	Expenses	15	Pension plans, empl	loyee benefits						
	<u>a</u>	1	Legal fees (attach so	•						
		_	Accounting fees (atta Other professional fees (a	1						
_	<u></u>	EG.	Linteres 1	ران الانتخاب الم						
	TE .	118-	Taxes (attach schedule)	တ္တန် _(s) See S	tm 1	2,135.	1,86	7.		
Ι,	<u></u>	19	Depreciality (Bitach	\ <u>\</u>						1
- V	3/15	777	Occupancy	7 ₁₇ [_		3
1		21_	Travel conferences,							
	\ ₹	O.E	Printing and publicant Other expenses (atta				 _		 	
	١٨٠			See Stateme	nt 2	32.				
	Ę,	24	Total operating and			2 167	1.00	_		
	To To	25	expenses. Add lines Contributions, gifts, grants	_ D	XV.	2,167. 359,695.	1,86	<i>/</i> .		359,695.
	Operating	26	Total expenses and	disbursements.	ĺ					
		27	Add lines 24 and 25	- line 12		361,862.	1,86	7.	0.	359,695.
		I	Subtract line 26 from Excess of revenue of							•
			and disbursements	•	ļ	-234,144.	 		,	
		1	Net investment inco	· •			151,86	1.	0.	
	DAA F		Adjusted net income	e (if negative, enter		tructions	TEE 002011 094	2001	<u> </u>	Form 990-PF (2019)

Day	+ 11	Balance Sheets	Attached schedules and amounts in the description column should be for end-of year amounts only	Beginning of year	End	of year
rai	CII	Dalatice Streets	(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest	•	179,717.	1,266,585	· <u> </u>
	2	Savings and tempora	ary cash investments			
	3	Accounts receivable	-			
		Less allowance for	doubtful accounts •			
	4	Pledges receivable	•			<u> </u>
	1_	Less allowance for	doubtful accounts			
	5	Grants receivable				ļ
	6	disqualified persons (attac	ers, directors, trustees, and other ch schedule) (see instructions)			
	7	Other notes and loans rece	` '			ļ
	_	Less allowance for				
	8	Inventories for sale of				
	9	Prepaid expenses ar	*			
Assets		obligations (attach s	•	97,788.		
As		b Investments — corporate s				
		c Investments — corporate I	(analon concesso)	5.	3	2.
	11	Investments – land, equipment basis	-		-	1
		Less accumulated deprect (attach schedule)	-			
		Investments — morto	, ,			
	1		(attach schedule) Statement 4	4,720,585.	3,543,274.	4,288,514.
	14	Land, buildings, and Less accumulated depreci	·· -			
		(attach schedule)	ation ►			
	15 16	Total assets (to be o	De ► See Statement 5) Completed by all filers —		1.	
			Also, see page 1, item I)	4,998,095.	4,809,863.	4,288,516.
	17	Accounts payable an	d accrued expenses			ļ <u>-</u>
10	18	Grants payable	•			<u> </u>
. E	19	•	are trustees 0 other described assesses			
寰	20	•	ors, trustees, & other disqualified persons payable (attach schedule)			
Liabilities	21 22					<u> </u>
		Other habilities (desc	/			
	23	Total liabilities (add	lines 17 through 22)	0.	0.	
ICES		Foundations that fol and complete lines 2	low FASB ASC 958, check here > 4, 25, 29, and 30.			;
salar	24	Net assets without do	onor restrictions			
Ind E	25	Net assets with dono				- ~
Net Assets or Fund Bala		and complete lines 2	not follow FASB ASC 958, check here XX 66 through 30.			
Š	26		rincipal, or current funds			
क्र	27		or land, bldg , and equipment fund.	4,998,095.	4,809,863.	1
Ą	28	٠.	lated income, endowment, or other funds			
ਲੋ	29		und balances (see instructions)	4,998,095.	4,809,863.	
Z	30	(see instructions)	net assets/fund balances	4,998,095.	4,809,863.	
Par	E III	Analysis of Chan	ges in Net Assets or Fund Balance			
1	Total	net assets or fund ba	lances at beginning of year - Part II, colu	mn (a), line 29 (must ac	ree with	
•	end-	of-year figure reported	on prior year's return)	(a)) mio es (mast aç	1	4,998,095.
2	Ente	r amount from Part I,	line 27a		2	-234,144.
3	Other	increases not included in lin	e 2 (Itemize) See Statement 6		3	45,912.
4		lines 1, 2, and 3			4	4,809,863.
		ases not included in line 2 (i			5	
	Total	net assets or fund ba	lances at end of year (line 4 minus line 5)		ne 29 6	4,809,863.
			, TEE 403031 05	0.000.00		Form 990-PF (2019)

	rt IV Capital Gains and				14000	(d) 0
		the kind(s) of property sold (for examp varehouse, or common stock, 200 sh	- MIC C- \ 1) How acquired P — Purchase D — Donation	(C) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1:	a See Statement 7					
	<u> </u>					
	<u>c</u>					
	<u>d</u>					
	e	(f) Depreciation allowed	(g) Cost or other basis		(h) Gain or	(loss)
	(e) Gross sales price	(or allowable)	plus expense of sale	<u> </u>	((e) plus (f) m	
	ab					
	c					
	d					
	e					
	Complete only for assets showing	g gain in column (h) and owned by the			(I) Gains (Col	(h)
	(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		ain minus col (k), bi an -0-) or Losses (fro	
	a					
	b		 			
	c	 				
	u e	 				
	Capital gain net income or (ne		enter in Part I, line 7			
	• •	(loss) as defined in sections 1222(5)	ter -0- in Part I, line 7	2		-26,016.
ŭ	, -		· · · · · · · · · · · · · · · · · · ·			
	in gain, also enter in Part I, lin in Part I, line 8	e 8, column (c). See instructions. If	(loss), enter -u-	3		0.
Pai	rt V Qualification Unde	r Section 4940(e) for Reduce	d Tax on Net Investmer	nt Income		
(For	optional use by domestic private f	oundations subject to the section 4940	(a) tax on net investment incom	ne.)		
lf se	ction 4940(d)(2) applies, leave	this part blank.				
	.,,,,	·		12		
		ction 4942 tax on the distributable a ify under section 4940(e). Do not co	• •	e perioa/	Yes	X No
1		each column for each year, see the ins		ifries		
<u> </u>		(b)	(c)	11103	(d)	
	(a) Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	Net value of noncharitable-use assets	s (Distribution (col (b) divided	
	2018	230,679.	4,550,	712		
	2017	189,499.		712.1		by col (c))
	2016		4,368,	339.		0.050691 0.043380
	2015	155,402.	4,368, 4,151,	339. 143.		0.050691 0.043380 0.037436
		155,402. 167,100.	4,368, 4,151, 4,000,	339. 143. 649.		0.050691 0.043380 0.037436 0.041768
	2014	155,402.	4,368, 4,151,	339. 143. 649.		0.050691 0.043380 0.037436 0.041768
2		155,402. 167,100.	4,368, 4,151, 4,000,	339. 143. 649.		0.050691 0.043380 0.037436 0.041768 0.020123
2	2014 Total of line 1, column (d) Average distribution ratio for the	155, 402. 167, 100. 49, 100.	4, 368, 4, 151, 4, 000, 2, 439,	339. 143. 649. 938.		0.050691 0.043380 0.037436 0.041768 0.020123 0.193398
_	2014 Total of line 1, column (d) Average distribution ratio for the	155,402. 167,100. 49,100.	4, 368, 4, 151, 4, 000, 2, 439,	339. 143. 649. 938.		0.050691 0.043380 0.037436 0.041768 0.020123 0.193398
_	2014 Total of line 1, column (d) Average distribution ratio for the number of years the foundation	155, 402. 167, 100. 49, 100.	4, 368, 4, 151, 4, 000, 2, 439, on line 2 by 5 0, or by the 5 years	339. 143. 649. 938.	5	0.050691 0.043380 0.037436 0.041768 0.020123 0.193398
3	2014 Total of line 1, column (d) Average distribution ratio for the number of years the foundation	155, 402. 167, 100. 49, 100.	4, 368, 4, 151, 4, 000, 2, 439, on line 2 by 5 0, or by the 5 years	339. 143. 649. 938.	5	0.050691 0.043380 0.037436 0.041768 0.020123 0.193398 0.038680
3	2014 Total of line 1, column (d) Average distribution ratio for the number of years the foundation Enter the net value of nonchar	155, 402. 167, 100. 49, 100. 5-year base period – divide the total on has been in existence if less than ritable-use assets for 2019 from Part	4, 368, 4, 151, 4, 000, 2, 439, on line 2 by 5 0, or by the 5 years	339. 143. 649. 938. 2 3	5	0.050691 0.043380 0.037436 0.041768 0.020123 0.193398 0.038680
3 4 5	2014 Total of line 1, column (d) Average distribution ratio for the number of years the foundation Enter the net value of nonchar Multiply line 4 by line 3	155, 402. 167, 100. 49, 100. 5-year base period – divide the total on has been in existence if less than ritable-use assets for 2019 from Part	4, 368, 4, 151, 4, 000, 2, 439, on line 2 by 5 0, or by the 5 years	339. 143. 649. 938. 2 3 4	5	0.050691 0.043380 0.037436 0.041768 0.020123 0.193398 0.038680 ,530,843.
3 4 5 6	2014 Total of line 1, column (d) Average distribution ratio for the number of years the foundation Enter the net value of nonchar Multiply line 4 by line 3 Enter 1% of net investment income.	155, 402. 167, 100. 49, 100. 5-year base period – divide the total on has been in existence if less than ritable-use assets for 2019 from Part come (1% of Part I, line 27b)	4, 368, 4, 151, 4, 000, 2, 439, on line 2 by 5 0, or by the 5 years	339. 143. 649. 938. 2 3 4 5	5	0.050691 0.043380 0.037436 0.041768 0.020123 0.193398 0.038680 ,530,843. 213,933. 1,519.



	990-PF (2019) Russell and Jane Stern Charitable			<u> 325913.</u>		F	age 4
Par		40(b), 4940(e), or 494	3 – see	instructio	ns)		
1 a		N/A' on line 1.	7 [
	Date of ruling or determination letter (attach copy of letter if necessary -	- see instructions)	1				
b	Domestic foundations that meet the section 4940(e) requirements in Part V,		-	1		1,	<u>519.</u>
	check here. ► X and enter 1% of Part I, line 27b			{		-	•
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, I	ine 12, col (b)	J ├	-+			
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,	519.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundation		· -0-)	4			0.
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, ent	er -U-	}	5		1,	519.
6	Credits/Payments	ا جا	417				1
	2019 estimated tax pymts and 2018 overpayment credited to 2019 Exempt foreign organizations — tax withheld at source	6a 1,	417.				
	Tax paid with application for extension of time to file (Form 8868)	6c		_		<u></u>	
	Backup withholding erroneously withheld	6d		4			. ez 🚶
	Total credits and payments. Add lines 6a through 6d	- 00		7		1	117.
8		220 is attached	}	8		_ 1,4	1.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	120 is attached	<u>.</u>	9		-	103.
	Overpayment, If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			10			103.
11	Enter the amount of line 10 to be Credited to 2020 estimated tax	Refunded	-	11			
	VII-A Statements Regarding Activities	netunided		··· / -			
	<u></u>					Yes	No
1 a	During the tax year, did the foundation attempt to influence any national, state, o participate or intervene in any political campaign?	r local legislation or d	lid it		1 a	103	X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political pu See the instructions for the definition	rposes?			16		X
	If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies or distributed by the foundation in connection with the activities	of any materials publish	ed				İ
С	Did the foundation file Form 1120-POL for this year?				1 c		X
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed						
_	(1) On the foundation \$\\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \			0	<u>-</u>		1
е	foundation managers \$ 0	enditure tax imposed o	11				_ 1
2	Has the foundation engaged in any activities that have not previously been report	ted to the IRS?			2		X
	If 'Yes,' attach a detailed description of the activities.						
,	Has the foundation made any changes, not previously reported to the IRS, in its governing	ina instrument articlas]		
3	of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a confor	med copy of the chan	ges		3		X
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during	ng the year?			4 a		X
b	If 'Yes,' has it filed a tax return on Form 990-T for this year?				4 b	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?				5		
	If 'Yes,' attach the statement required by General Instruction T					•	
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) s.	atisfied either			1.		
	 By language in the governing instrument, or 						
	By state legislation that effectively amends the governing instrument so that no mand with the state law remain in the governing instrument?	atory directions that co	nflict		6	Х	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, o	col (c), and Part XV			7	X	
	Enter the states to which the foundation reports or with which it is registered. See instru				—		-
	FL						
b	If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney Gene	ral					
_	(or designate) of each state as required by <i>General Instruction G7</i> If 'No,' attach explanation				8ь	Х	
9	Is the foundation claiming status as a private operating foundation within the mea for calendar year 2019 or the tax year beginning in 2019? See the instructions for	ning of section 4942(Part XIV. If 'Yes,' co	j)(3) or 4 mplete f	4942(j)(5) Part XIV	9		<u>X</u>
	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a s and addresses	schedule listing their na	mes		10	_	_X
							

7

11 At any kine during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 51(20)(3) if Yes, statch schedule, See instructions 11	. 4	Term A Statements Regulating Notivities (commissed)				
advisory privileges? If Yes, attach statement See instructions 12	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule. See instructions		11	Yes	No X
13 but the foundation comply with the public inspection requirements for its annual returns and exemption application? 3 X	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement See instructions		12		Х
Telephone no 772-225-2677 Located at 6340 SE Barbor CTL Stuart FL 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 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, either the name of the foreign country. Part VI-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. Part VI-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. 1 a During the year, did the foundation (either directly or indirectly). (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburs the exceptions of a disqualified person? (5) Transfer any income or assets to a disqualified person (absqualified person)? (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 termination within 90 days.) bit any answer is, Yes' to 1a(1)—(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53 443 ((a))-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance? 2 Taxes on failure to distribute income (section 4942) (does not applying t	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption applica-	ation?	13	X	
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — check here and enter the anount of tax-exempt interest received or accrued during the year 16 At any time during catendar year 2019, dot 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. Part VILB—1 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. 1 a During the year, did the foundation (either directly or indirectly) 1 (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (6) Agree to pay money or property to a government official? (Exception, Check "No" if the foundation appeared to make a grant to or to emilory the official for a period after termination of government service, if terminating within 90 days. (6) Agree to pay money or property to a government official? (Exception, Check "No" if the foundation section 53 494 (10), 3 or in a current notice regarding disaster assistance. See instructions Organizations relying on a current notice regarding disaster assistance. See instructions Organizations relying on a current notice regarding disaster assistance. See instructions Organizations relying on a current notice regarding disaster assistance. See instructions Organizations relying to the first day of the lax year beginn	14			<u>25-2</u>	<u>6</u> 77_	- -
Yes No No No No No No No N	15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — check here	-	Ŋ/Ā		
See the instructions for exceptions and filing requirements for in/CEN Form 114 if Yes, either the name of the foreign country			15		V	_
enter the name of the foreign country Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the Yes' column, unless an exception applies. 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? Yes X No Ves X N	16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial_account in a foreign country?		16	res	⊢
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a During the year, did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person? (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.) 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 (6)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here 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? 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 49422(3) or 4942(3)(3) or 4942(3)						·
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(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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? (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, it ferminating within 90 days.) 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 c) Id the foundation engage in a prior year in any of the acts fast to qualify under the exceptions described acts, that were not corrected before the first day of the tax year beginning in 2019? 1 Tyes, list the years of distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(0)(3) or 4942(0)(3)) 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 listed in 2 a for which the foundation is not applying the provisions of section 4942(a)(2) to all years listed, answer 'No' and attach statement — see instructions.) 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 10, 15, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation make any investment in a prior year (but after December 31, 1969) that could geo	1 a	During the year, did the foundation (either directly or indirectly)				
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enterprise at any time during the year? Yes X No	_					
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jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019? 4b X		D. J. H. C. and J. and			-	•
	Ь	peopardize its charitable purpose that had not been removed from peopardy before the first day of		4 b	-	. X
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Form 990-PF (2019) Russell and Jane	Stern Charitabl	le		259132	Page 6
Part VII-B Statements Regarding Activit		n 4/20 Iviay Be Red	uirea (continuea		
5 a During the year, did the foundation pay or incur a(1) Carry on propaganda, or otherwise attem	•	on (section 4945(e))?	Yes	X No	Yes No
	-		☐ 163		
(2) Influence the outcome of any specific put on, directly or indirectly, any voter registr.(3) Provide a grant to an individual for travel.	ation drive?		— i	X No X No	;
(4) Provide a grant to an organization other than in section 4945(d)(4)(A)? See instructions	n a charitable, etc., organ	<i>,</i> .		X No	
(5) Provide for any purpose other than religio		c. literary, or		스	'
educational purposes, or for the prevention	on of cruelty to children	or animals?	'	X No	
b If any answer is 'Yes' to 5a(1)—(5), did any or described in Regulations section 53 4945 or in a See instructions	current notice regarding	disaster assistance?	ptions	5 b	N/A
Organizations relying on a current notice rega	arding disaster assistan	ce, check here	•		1 1
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon If 'Yes,' attach the statement required by Reg	isibility for the grant?	,	N/A Yes	□ No	
•			_	1 1	
 6 a Did the foundation, during the year, receive as on a personal benefit contract? b Did the foundation, during the year, pay prem 			Yes	X No 6 b	- X
If 'Yes' to 6b, file Form 8870	name, and only of mande	ony, on a personal bene	nt oonwast	100	
7 a At any time during the tax year, was the found b If 'Yes,' did the foundation receive any process	, , ,		<u></u>	XNo D	
8 Is the foundation subject to the section 4960 tax of	on payment(s) of more th	an \$1,000,000 in remune		T	
or excess parachute payment(s) during the ye	ear?		Yes	X No	
Part VIII Information About Officers, D and Contractors	·			Employees,	·
1 List all officers, directors, trustees, and found	T				
(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 deferre compensation	(e) Expense	
Russell Stern	Trustee	0.	0		0.
6340 Harbor Circle	0.50	1			
Stuart, FL 34996					
				}	
2 Compensation of five highest-paid employees (of	her than those included	on line 1 – see instruction	as). If none, enter 'NON	 F.'	
(a) Name and address of each employee	(b) Title, and average		(d)Contributions to	4-15-	account
paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benefit plans and deferred compensation		wances
None					
			 	 	
					
Total number of other employees paid over \$50,000	<u> </u>			 	0
10 13 = 10 mm = 1 mm = 1 mm					

Form **990-PF** (2019)

Form 990-PF (2019) Russell and Jane Stern Charitable	46-325	59132 Page
Part VIII Information About Officers, Directors, Trustees, Found and Contractors (continued)	ation Managers, Highly Paid E	mployees,
3 Five highest-paid independent contractors for professional services. See in	structions. 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		
ist the foundation's four largest direct charitable activities during the tax year. Include relevant statistical organizations and other beneficiaries served, conferences convened, research papers produced, etc	information such as the number of	Expenses
organizations and other beneficiaries served, conferences convened, research papers produced, etc		
1 <u>N/A</u>		
2		
		 _
3		
4		
·		
Part IX-B Summary of Program-Related Investments (see instruction	tions)	
Describe the two largest program-related investments made by the foundation during the		Amount
1 <u>N/A</u>		
2		
All other program-related investments. See instructions		
3		

Total. Add lines 1 through 3

٠,	Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1 a	359,695.
ı	Program-related investments — total from Part IX-B	1 b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
	Amounts set aside for specific charitable projects that satisfy the a Suitability test (prior IRS approval required)	3 a	
1	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	359,695.
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	1,519.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	358,176.

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.

BAA

Form 990-PF (2019)

Part XIII Undistributed Income (see instructions)

			(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1	Distributable amount fo line 7	r 2019 from Part XI,	,			275,023.
2	Undistributed income, if any, a	as of the end of 2019				
i	Enter amount for 2018	only			202,302.	
- 1	Total for prior years 20	_ , 20 , 20		0.		
3	Excess distributions carryover	, if any, to 2019				
į	From 2014 ,	106,993.			•	
١	rom 2015	30,663.				1
(From 2016	54.		,		
(from 2017	266,568.				
•	From 2018	44,199.				
1	Total of lines 3a through	h e.	448,477.			
4	Qualifying distributions	for 2019 from Part	-			•
	XII, line 4 🕨 💲	359,695.				-
ě	Applied to 2018, but no	t more than line 2a			202,302.	<u>'</u>
١	Applied to undistributed (Election required — sec			0.		
	Treated as distributions (Election required – sec	e instructions)	0.	· · · · · · · · · · · · · · · · · · ·		
	Applied to 2019 distribu	<u></u>				157,393.
	Remaining amount distr	·	0.			Ì
5	Excess distributions carryover (If an amount appears i same amount must be s	n column (d), the	117,630.			117,630.
6	Enter the net total of ea indicated below:	ich column as				
ã	Corpus. Add lines 3f, 4c, and 4	le Subtract line 5	330,847.			i
ł	Prior years' undistribute line 4b from line 2b	d income. Subtract		0.		:
•	Enter the amount of pri income for which a notion been issued, or on which tax has been previously	ce of deficiency has high the section 4942(a)		0.		
•	Subtract line 6c from lin amount – see instruction			0.		
•	e Undistributed income for 2018, line 2a. Taxable amount — see				0.	
f	Undistributed income fo 4d and 5 from line 1 Th distributed in 2020					0.
7	Amounts treated as dist corpus to satisfy requirem section 170(b)(1)(F) or 49 may be required — see	nents imposed by 42(a)(3) (Election	0.			
8	Excess distributions car applied on line 5 or line	ryover from 2014 not 7 (see instructions)	0.			
9	Excess distributions ca Subtract lines 7 and 8 fi	rryover to 2020.	330,847.			
0	Analysis of line 9	Γ	,			- 1
a	Excess from 2015	20,026.				•
Ł	Excess from 2016	54.				1
c	Excess from 2017	266,568.		j		1
c	Excess from 2018.	44,199.				ì
_ e	Excess from 2019					

If the foundation has received a ruling or determ is effective for 2019, enter the date of the rule of the check box to indicate whether the foundation a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed a 85% of line 2a Qualifying distributions from Part XII, line 4, for each year listed	nination letter that iling	it is a private operaterating foundation of	ing foundation, and th		N/A 4942(j)(5)
c Seffective for 2019, enter the date of the rule of the check box to indicate whether the foundation income from Part I or the minimum investment return from Part X for each year listed to 85% of line 2a Qualifying distributions from Part XII,	ılıng n ıs a prıvate ope Tax year	rating foundation of	described in section	/ *	4942(1)(5)
a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed. a 85% of line 2a C Qualifying distributions from Part XII,	Tax year			4942(J)(3) or	4942(i)(5)
income from Part I or the minimum investment return from Part X for each year listed a 85% of line 2a Qualifying distributions from Part XII,					
investment return from Part X for each year listed 585% of line 2a Callifying distributions from Part XII,	(a) 2019		Prior 3 years	/	(e) Total
s 85% of line 2a C Qualifying distributions from Part XII,		(b) 2018	(c) 2017	(d) 2016	
Qualifying distributions from Part XII,	 _				
line 4, for each year listed					
d Americate conflicted on long to make consideration.					
1 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					
Complete 3a, b, or c for the alternative test relied upon					
'Assets' alternative test — enter			1		
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
o 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed					
: '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 442(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					
TXV Supplementary Information (C assets at any time during the	Complete this year — see in:	part only if the structions.)	foundation had	\$5,000 or more	in
Information Regarding Foundation Manager List any managers of the foundation who have colose of any tax year (but only if they have connected to the second	ontributed more th	an 2% of the total chan \$5,000). (See	ontributions received b section 507(d)(2).)	y the foundation befo	ore the
List any managers of the foundation who own 10 a partnership or other entity) of which the for None	0% or more of the undation has a 10	stock of a corporation or greater inter-	n (or an equally large est	portion of the owners	ship of
Information Regarding Contribution, Grant, Gif	t, Loan, Scholarsh	ip, etc., Programs:			
Check here ► X if the foundation only make requests for funds. If the foundation makes g	s contributions to p	preselected charitable	e organizations and de rganizations under o	oes not accept unsoli ther conditions, con	cited nplete items
2a, b, c, and d See instructions. The name, address, and telephone number or elements.	mail address of the	e person to whom ar	plications should be a	ddressed	
The Harrier dual coop and telephone Harrison of Ch		, 50, 20, 10, 0,			
The form in which applications should be sub	omitted and inforr	nation and materia	ils they should includ	le	
Any submission deadlines					
Any restrictions or limitations on awards, suc	h as hi sassis :1	wood arone should	ble fields lands of	stitutions or sibs	factors

TEEA0310L 08/22/19

Form **990-PF** (2019)

Page 11

3	Grants and Contributions Paid During the Ye	ar or Approved for Fut	ure Paymen	nt	
	Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
	Name and address (home or business)	or substantial contributor	recipient		
	Paid during the year		İ		
See	Statement 8		1		
			Ì		
			[
		J	ļ		
			ļ		
	1				
					1
					1
					ľ
	Total			► 3a	359,695.
	Approved for future payment				
]
					Į
					1
					}
	Total			► 3b	
	Total				Fr 000 DE (2010)

Enter gros	I-A Analysis of Income-Producing s amounts unless otherwise indicated.		d business income	Excluded by	section 512, 513, or 514	(e)
		(a) Business code	(b) Amount	(c) Exclu- sion	(d) Amount	Related or exempt function income (See instructions.)
-	ram service revenue			code		
a		+		+		
ь		 		- -		
ď		 		+		
ĕ		 				
<u> </u>		1 - 1				
a Fees	and contracts from government agencies	 		 	·	
_	bership dues and assessments			 		
3 Interes	st on savings and temporary cash investments			14	3,458.	
4 Divid	ends and interest from securities			14	150,276.	
5 Net r	ental income or (loss) from real estate	1-	-1.° - 1	-= -		"
a Debt-	-financed property					
b Not d	debt-financed property					
6 Net re	ntal income or (loss) from personal property					
7 Other	r investment income					
8 Gain o	r (loss) from sales of assets other than inventory			14	-26,016.	
	ncome or (loss) from special events					
	s profit or (loss) from sales of inventory					
11 Other	r revenue		=			<u></u>
a		 				
ь				+		
						
d		╂───				
12 Subto	otal Add columns (b), (d), and (e)	 		 -	107 710	
	. Add line 12, columns (b), (d), and (e)		· · · · · · · · · · · · · · · · · · ·		127,718. 13	127,718.
	sheet in line 13 instructions to verify calculate	ons.)			'5 -	1Z/_/110.
	-B Relationship of Activities to the		shment of Exem	nt Purpose	<u> </u>	
Line No.						v to the
▼			per than by providing	f.,	h (C	,
•	Explain below how each activity for which is accomplishment of the foundation's exempt	purposes (oti	ier triair by providing	tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti	Tel than by providing	tunas for suc	n purposes) (See in	structions)
N/A	accomplishment of the foundation's exempt	purposes (oti	iei triair by providing	tunds for suc	in purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti	ier than by providing	Tunds for suc	n purposes) (See in	structions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti	ier trials by providing	Tunds for Suc	n purposes) (See in	structions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti	ier trials by providing	Tunas for suc	n purposes) (See in	structions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti	ier trials by providing	Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti	ier triality providing	Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti	ier triality providing	Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti	ier triality providing	Tunas for suc	n purposes) (See in	istructions)
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<u> </u>	accomplishment of the foundation's exempt	purposes (oti	ier triality providing	Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti	ier trialit by providing	Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti	ier trialit by providing	Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti	ier trialit by providing	Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti		Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti		Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti		Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti		Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti		Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti		Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti		Tunas for suc	n purposes) (See in	istructions)
<u> </u>	accomplishment of the foundation's exempt	purposes (oti		Tunas for suc	n purposes) (See in	istructions)

Yes No

Form 990-PF (2019) Russell and Jane Stern Charitable 46-3259132 Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt 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 from a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Rembursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations c Sharing of facilities, equipment, making 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 are only transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received (a) Line no (b) Amount moveled (c) Name of menchanistie exempt organization (d) Description of transfers, transactions, and sharing arrangements N/A 2 a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations (d) Description of transfers, transactions, and sharing arrangements N/A (a) Name of organization (b) Type of organization (c) Description of relationship (c) Description of relationship (d) Name of organization (e) Name of organization (f) Description of relationship (g) Name of organization (h) Type of organization (h) Type of organization (g) Name of organization in relationship (g) Name of organization (h) Type of organization	(1) Cash (2) Other assets b Other transactons (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 quarantees (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 of the goods, other assets, or services received (a) Line to (b) Amount movived (c) Name of mencharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements 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)(d3)) or in section 527? Yes No If Yes,' complete the following schedule (a) Name of organization (b) Type of organization (c) Description of transfers, transactions, and sharing arrangements Yes No If Yes,' complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship N/A	descri	ie organization directly bed in section 501(c) (ig to political organizat	(other than sec	ngage in any of the following tion 501(c)(3) organizations)	or in section	er organizatio 527,	n		
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) Loars or loan guarantees (6) Performance of services or membership or fundraising solicitations (7) Salars or loan guarantees (8) Performance of services or membership or fundraising solicitations (8) Experiment 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 on the goods, other assets, or services of the goods. Other services of the goods Other services received less than fair market value of the goods of the g	22) Other assets b Other transactions (1) Sales of assets for a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rehald of facilities, equipment, or other assets (4) Rembursement arrangements (5) Loans or loan guarantes. (6) Performance of services or membership or fundrasing solicitations c Sharing of facilities, equipment, mailing lists, other assets, or pard employes 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 of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value of the goods, other assets, or services are received (a) tune to (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfert, fransactions, and sharing arrangements. Za is the foundation directly or indirectly affiliated with, or related to, one or more itax-exempt organizations described in section 501(c) (other than section 501(c)(5)) or in section 52?? Za is the foundation directly or indirectly affiliated with, or related to, one or more itax-exempt organizations described in section 501(c) (other than section 52) or indirectly or indirectly affiliated with, or related to, one or more itax-exempt organizations described in section 501(c) (other than section 52) or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or i	a Transf	fers from the reporting	foundation to	a noncharitable exempt organ	nization of				
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) Loars or loan guarantees (6) Performance of services or membership or fundraising solicitations (7) Salars or loan guarantees (8) Performance of services or membership or fundraising solicitations (8) Experiment 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 on the goods, other assets, or services of the goods. Other services of the goods Other services received less than fair market value of the goods of the g	22) Other assets b Other transactions (1) Sales of assets for a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rehald of facilities, equipment, or other assets (4) Rembursement arrangements (5) Loans or loan guarantes. (6) Performance of services or membership or fundrasing solicitations c Sharing of facilities, equipment, mailing lists, other assets, or pard employes 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 of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value of the goods, other assets, or services are received (a) tune to (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfert, fransactions, and sharing arrangements. Za is the foundation directly or indirectly affiliated with, or related to, one or more itax-exempt organizations described in section 501(c) (other than section 501(c)(5)) or in section 52?? Za is the foundation directly or indirectly affiliated with, or related to, one or more itax-exempt organizations described in section 501(c) (other than section 52) or indirectly or indirectly affiliated with, or related to, one or more itax-exempt organizations described in section 501(c) (other than section 52) or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or indirectly or i	(1) Ca	ash						1 a (1)	X
(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 (7) Casharing of facilities, equipment, mailing lists, other assets, or paid employees (8) 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 of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value of any fransaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. (a) Line to (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements. (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements. (a) Name of organization (b) Type of organization (c) Description of relationship. (b) If Yes, Complete the following schedule: (a) Name of organization (b) Type of organization (c) Description of relationship. (b) Type of organization (c) Description of relationship. (c) Description of relationship.	(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 guarantes (5) Loans or loan guarantes (6) Performance of services or membership or fundrasing solicitations (6) Performance of services or membership or fundrasing solicitations (7) Example of facilities, equipment, mailing lists, other assets, or paid employees (8) If the answer to any of the above is Y'es,' 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 of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value of the goods, other assets, or services received (a) Iwa to (b) Amount model (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements Za is the foundation directly or indirectly affiliated with, or related to, one or more its-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 52?? Yes \(\) No bit Y'es,' complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship Via A to the foundation directly or indirectly affiliated with, or related to, one or more its-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 52?? Yes \(\) No bit Y'es,' complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship Figure is supplied to the following schedule and statements, and to the best of my knowledge and belief, it is to be completed to the second organization or which prepare fea	(2) 01	ther assets							Х
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	Signature of officer or trustee Print/Type preparer's name Preparer's signature Preparer's signature Self-Prepared Prim's name Firm's name Firm's address Print/Type preparer's name Preparer's signature Preparer Firm's name Firm's address Print/Type preparer's name Preparer's signature Preparer's signature Print/Type preparer's name Preparer's signature Print/Type preparer's name Preparer's signature Print/Type preparer's name Pr	Sign				n of which prepar	er has any knowle		May the IR this return preparer si	S discuss with the hown below?
Signature of officer or trustee Date Title Yes No	Print/Type preparer's name Preparer's signature Preparer Print/Type preparer's name Preparer's signature Date Check If PTIN Self-Prepared Firm's name Firm's address Firm's address	Sig	nature of officer or trustee		Date					
	Paid Self-Prepared self-employed Preparer Firm's name Firm's address Firm's address Firm's address Self-employed Self-employ		Print/Type preparer's nan	ne	Preparer's signature	D	ate	Check] if		
	Preparer Use Only Firm's address Firm's address Firm's address	Paid			Self-Prepared			_		
	Use Only Firm's address >		Firm's name		11-2			Firm's EIN		
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Phone no		BAA							Form 990	- PF (2019)
Phone no	I F 000 PF /00101	DAA	L.						rorm 990	-PF (2019)

2019		deral State			Page
		Foundation			46-3259
Statement 1 Form 990-PF, Part I, Li Taxes	ne 18				
		(a) Expenses per Books		nt Adjus	sted Charitable
2019 Templeton Glo	-	\$ 1,867. 268.		67. 67. \$	0. \$ 0
Statement 2 Form 990-PF, Part I, Li Other Expenses	ne 23				
L&H Stern Family F	'dn - Filing Fees Total			nt Adju	(c) (d) sted Charitable ncome Purposes 0. \$ 0
Statement 3 Form 990-PF, Part II, Li Investments - Corpora	ine 10c te Bonds			·	
Corporate Bonds			/aluation <u>Method</u>	Book Value	Fair Market Value
SCIENTIFIC LEASI 8 TELIGENT, INC 11.5			kt Val kt Val Total	\$	0. \$ 2. 3. 0. 3. \$ 2.
Statement 4 Form 990-PF, Part II, Li Investments - Other	ne 13	· · · · · · · · · · · · · · · · · · ·			, ,,
		,	/aluation <u>Method</u>	Book Value	Fair Market Value
Other Investments ARROWMARK FUNDAMEN ARROWMARK INCOME F SANDALWOOD FUND D DODGE & COX INC FU DOUBLELINE TOTAL R WESTWOOD INCOME OP TEMPLETON GLOBAL	UND EBT B SPC ND ETURN	M M M M	kt Val kt Val kt Val kt Val kt Val kt Val	\$ 475,0 500,0 865,4 871,7	0. 0. 185. 886,258. 737. 867,572. 0. 0.

Total \$ 3,543,274. \$ 4,288,514.

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Russell and Jane Stern Charitable Foundation

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Statement 5 Form 990-PF, Part II, Line 15 Other Assets

	_Book	<u>Value</u>	Fair Market <u>Value</u>
Rounding	Total \$	1.	\$ 0.

Statement 6 Form 990-PF, Part III, Line 3 Other Increases

Cash from the Lou & Harry Stern Family Fd EIN#11-2952489n \$ 10. Madoff Theft Recovery $\frac{45,902}{$45,912}$.

Statement 7
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

		(b) How	(c) Date	(d) Date
Item	(a) Description	<u>Acquired</u>	_Acquired_	Sold
$\overline{1}$	894,718 Fidelity Money market FDS Instl	Purchased	5/01/2019	8/01/2019
2	611,647.55 Fidelity money market FDS Instl	Purchased	9/13/2018	10/14/2019
3	1,1976 Westwood Income opportunity Fd	Purchased	1/01/2019	1/15/2019
4	29,303 Westwood income Opportunity Fd In	Purchased	1/01/2018	1/15/2019
5	100,000 US treasury Strip	Purchased	4/03/2017	8/19/2019
6	Capital Gain Dividends			

<u>Item</u> 1 2 3 4	(e) Gross Sales 894,707. 611,637. 28,514. 422,842. 98,642.	(f) Deprec. <u>Allowed</u>	(g) Cost <u>Basis</u> 894,727. 611,653. 28,473. 451,630. 98,806.	(h) Gain (Loss) -2016. 4128,788164.	(i) FMV <u>12/31/69</u>	(j) Adj. Bas. <u>12/31/69</u>	(k) Excess (i)-(j)	(1) Gain (Loss) \$ -20. -16. 41. -28,788. -164.
6	55,555						Total	$\frac{2,931.}{$-26,016.}$

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Statement 8 Form 990-PF, Part XV, Line 3a Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
Hibiscus Children's Center 2400 NE Dixie Hywy Jensen Beach FL 34957	None	PF	For children's early intervention abuse programs	\$ 1,000.
THE SANDS POINT PRESERVE CONSERVANCY 127 Middle Neck Rd. Port Washington NY 11050	None	PC	FOR PRESERVATION OF PRESERVE	11,000.
The Hobe Sound Nature Center 13640 SE Federal Hwy Hobe Sound FL 33455	None	PC	For Natural Resouce Conservation	500.
Port Washington Library Foundation 1 Library Dr. Port Washington NY 11050	None	PF	CHILDREN'S LIBRARY RENOVATION	1,000.
Martin Health Foundation 2135 SE Ocean Blvd. Stuart FL 34995	None	POF	TO FUND NEW EQUIPMENT, FACILITIES, TECHNOLOGY & EDUCATION FOR HOSPITAL STAFF.	10,000.
The Community Synagogue 160 Middle Neck Rd Port Washington NY 11050	None	NC	ForThanksgiving meal drive	1,000.
Saint Peter's University 2641 John F Kennedy Blvd Jersey City NJ 07306	None	NC	THE SAINT PETER FUND	25,000.
LIBRARY FOUNDATION OF MARTIN COUNTY 2351 SE MONTEREY RD STUART FL 34996	NONE	PF	DONATIONS TO ENRICH LIBRARY SERVICES NOT MET BY PUBLIC FUNDING	1,000.
NORTHWELL HEALTH FOUNDATION 200 MARCUS AVENUE NEW HYDE PARK NY 11042	NONE	POF	FOR NSLIJ HOFSTRA SCHOOL OF MEDICINE	200,000.
THE NATURE CONSERVANCY 4245 N. FAIRFAX DRIVE ARLINGTON VA 22203	NONE	POF	TO PROTECT ENDANGERED SPECIES	100.

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Statement 8 (continued) Form 990-PF, Part XV, Line 3a Recipient Paid During the Year

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Name and Address	Donee <u>Relationship</u>	Found- ation Status	Purpose of Grant	Amount
UNIV. OF PA- BASSER CENTER 3451 WALNUT STREET PHILADELPHIA PA 19104	NONE	NC	TO SUPPORT BASSER CENTER FOR BRCA AT PENN MEDICINE'S ABRAMSON CANCER CENTER	\$ 10,000.
ATLANTIC CLASSICAL ORCHESTRA 141 NORTH US HIGHWAY 1 FORT PIERCE FL 34950	NONE	PC	TO DELIVER ENRICHING EDUCATIONAL & TRAINING PROGRAMS TO YOUNG ADULTS	5,000.
THE DUNBAR CENTER 12100 SE LANTANA AVENUE HOBE SOUND FL 33455	NONE	PF	PURCHASE OF EARLY HEAD START PLAYGROUND MODULE AND INSTALLATION COSTS	25,000.
THE FRIENDS OF VOLUNTEERS IN MEDICINE 417 SE BALBOA AVENUE STUART FL 34994	NONE	POF	PROVIDING MONTHS WORTH OF INITIAL VISITS TO 1,000 PATIENTS AT VIM CLINIC	10,650.
ALZEHEIMER'S FOUNDATION OF AMERICA 322 EIGHT AVENUE 7TH FLOOR NEW YORK NY 10001	None	POF	TO HELP ASSURE QUALITY OF CARE IN SERVICE TO INDIVIDUALS WITH ALZHEIMERS DISEASE AND THEIR CAREGIVERS	250.
FOLDS OF HONOR DEPARTMENT 13 TULSA OK 74182	NONE	POF	TO PROVIDE EDUCATIONAL SCHOLARSHIPS TO SPOUSES & CHILDREN OF AMERICA'S FALLEN & DISABLED SERVICE MEMBERS	150.
COUNCIL ON AGING OF MARTIN COUNTY INC. 900SE SALERNO RD STUART FL 34997	NONE	POF	TO AID SERVICES FOR THE AGED IN MARTIN COUNTY	10,000.
SMITH COLLEGE 10 Elm Street Northampton MA 01063	None	NC	For The Smith Fund	65.

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Statement 8 (continued) Form 990-PF, Part XV, Line 3a Recipient Paid During the Year

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Name and Address	Donee <u>Relationship</u>	Found- ation Status	Purpose of Grant_	Amount
PORT WASHINGTON FIRE DEPARTMENT 423 Port washington Blvd Port Washiongton NY 11050	NONE	PC	For firefighting and emergency services	\$ 50.
US HOLOCAUST MEMORIAL MUSEUM 220NW Corporate Blvd, Suite 305 Boca Raton FL 33431	None	PC	To keep Holocaust memory alive	10,000.
EDUCATIONAL VISIONS 2684 SW Grennwich Way Palm City FL 34990	None	PC	For Adult Continuing Education	2,500.
KEN DUKE AND FRIENDS, INC. 25 Island Rd Stuart FL 34996	None	PC	supporting well-deserving local and national organizations thru annual celebrity pro-am golf tournament	1,430.
Friends of the Lyric Inc 59 SW Flagler Avenue Stuart FL 34994	None	PC	To restore historic 1926 theatre building in Stuart, FL and	500.
HELEN KELLER SERVICES 180 Livingston St, 2nd FL Brooklyn NY 11201	None	PC	Rehabilitaion programs for bling or visually impared individuals	1,000.
PROJECT LIFT 1330 SW 34th Street Palm City FL 34990	None .	PF	Substance abuse treatmnet for at risk youth and their families	5,000.
THE BANNER LAKE CLUB, INC. PO Box 1875 Hobe Sound FL 33475	None .	PC	For children's after school programs and food assistance	25,000.
SANDS POINT GOLF FUND 130 Middle Neck Road Port Washington NY 11050	None	PC	For Scholarships	1,500.

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Statement 8 (continued) Form 990-PF, Part XV, Line 3a Recipient Paid During the Year				
Name and Address	Donee <u>Relationship</u>	Found- ation <u>Status</u>	Purpose of <u>Grant</u>	Amount
COMMUNITY CHEST OF PORT WASHINGTON 382 Main Street Port Washington NY 11050	None	PC	For supporting senior citizen programs	\$ 1,000
			Total	\$ 359,69
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