

EXTENDED TO NOVEMBER 16, 2020
Return of Private Foundation

OMB No 1545-0047

2019

Open to Public Inspection

Form **990-PF**Department of the Treasury
Internal Revenue Service

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

For calendar year 2019 or tax year beginning

, and ending

Name of foundation ALAN & AMY MELTZER FAMILY FOUNDATION, INC		A Employer identification number 52-2069235
Number and street (or P O box number if mail is not delivered to street address) R PHILIPSON & CO 8601 GA AVE	Room/suite 1001	B Telephone number (301) 608-3900
City or town, state or province, country, and ZIP or foreign postal code SILVER SPRING, MD 20910		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 6,511,955.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		866,788.			
2 Check ☐ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		42,279.	41,979.		STATEMENT 1
4 Dividends and interest from securities		27,846.	27,846.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		397,391.			
b Gross sales price for all assets on line 6a 742,217.					
7 Capital gain net income (from Part IV, line 2)			397,391.		
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		-60,051.	-60,051.	0.	STATEMENT 3
12 Total. Add lines 1 through 11		1,274,253.	407,165.	0.	
13 Compensation of officers, directors, trustees, etc		0.	0.	0.	0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 4		57,084.	42,813.	0.	14,271.
b Accounting fees STMT 5		19,143.	14,357.	0.	4,786.
c Other professional fees STMT 6		30,145.	23,038.	0.	7,107.
17 Interest		15,011.	15,011.	0.	0.
18 Taxes STMT 7		1,005.	1,005.	0.	0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 8		67,452.	61,482.	0.	0.
24 Total operating and administrative expenses. Add lines 13 through 23		189,840.	157,706.	0.	26,164.
25 Contributions, gifts, grants paid		1,294,837.			1,294,837.
26 Total expenses and disbursements. Add lines 24 and 25		1,484,677.	157,706.	0.	1,321,001.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-210,424.			
b Net investment income (if negative, enter -0-)			249,459.		
c Adjusted net income (if negative, enter -0-)				0.	

Part II 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	7,785.		
	2 Savings and temporary cash investments	8,937.	21,127.	21,127.
	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	50,000.		
	7 Other notes and loans receivable ▶ 557,287.			
	Less: allowance for doubtful accounts ▶ 0.	116,755.	557,287.	557,287.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 11	1,265,031.	1,281,135.	2,814,329.
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis ▶		
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 12		3,207,205.	3,279,743.	3,100,956.
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶ STATEMENT 13)		4,735.	18,256.	18,256.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		4,660,448.	5,157,548.	6,511,955.
17 Accounts payable and accrued expenses				
18 Grants payable				
19 Deferred revenue				
20 Loans from officers, directors, trustees, and other disqualified persons				
21 Mortgages and other notes payable	279,390.	569,390.	STATEMENT 14	
22 Other liabilities (describe ▶ STATEMENT 15)	509,906.	649,020.		
23 Total liabilities (add lines 17 through 22)	789,296.	1,218,410.		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☒			
	26 Capital stock, trust principal, or current funds	0.	0.	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	28 Retained earnings, accumulated income, endowment, or other funds	3,871,152.	3,939,138.	
	29 Total net assets or fund balances	3,871,152.	3,939,138.	
30 Total liabilities and net assets/fund balances	4,660,448.	5,157,548.		

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	3,871,152.
2 Enter amount from Part I, line 27a	2	-210,424.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 9	3	379,964.
4 Add lines 1, 2, and 3	4	4,040,692.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 10	5	101,554.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	3,939,138.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a CB TWIN CEDARS LLC	P		
b CHARLES SCHWAB CAPITAL GAINS	P		
c CHARLES SCHWAB CAPITAL GAINS	P		
d CAPITAL GAINS DIVIDENDS			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a		37,199.	-37,199.
b 690,673.		302,787.	387,886.
c 4,996.		4,840.	156.
d 46,548.			46,548.
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			-37,199.
b			387,886.
c			156.
d			46,548.
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	397,391.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	952,261.	5,417,603.	.175772
2017	2,917,509.	6,484,779.	.449901
2016	1,186,354.	3,154,068.	.376135
2015	326,300.	2,586,636.	.126148
2014	287,863.	2,807,635.	.102529

2 Total of line 1, column (d)	2	1.230485
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	.246097
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	5,595,247.
5 Multiply line 4 by line 3	5	1,376,974.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,495.
7 Add lines 5 and 6	7	1,379,469.
8 Enter qualifying distributions from Part XII, line 4	8	1,321,001.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	4,989.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3 Add lines 1 and 2		3	4,989.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	4,989.
6 Credits/Payments:			
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	19,649.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	10,000.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	29,649.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	24,660.	
11 Enter the amount of line 10 to be: Credited to 2020 estimated tax ☐ 15,000. Refunded ☐	11	9,660.	

Part VII-A Statements Regarding Activities

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

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	11	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X
14 The books are in care of ► THE ORGANIZATION Telephone no. ► 301-608-3900 Located at ► R PHILIPSON & CO 8601 GA AVE, SILVER SPRING, MD ZIP+4 ► 20910		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

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

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

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

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?

☐ Yes ☒ No

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

N/A

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**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
ALAN MELTZER 3230 W. COMMERCIAL BLVD, SUITE 360 FT. LAUDERDALE, FL 33309	PRESIDENT 1.00	0.	0.	0.
AMY MELTZER 6500 ROCK SPRING DRIVE #500 BETHESDA, MD 20817	VICE PRES/TREASURER/SEC'Y 0.00	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 VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities	1a	2,339,660.
b	Average of monthly cash balances	1b	31,943.
c	Fair market value of all other assets	1c	3,308,851.
d	Total (add lines 1a, b, and c)	1d	5,680,454.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) SEE STATEMENT 17	1e	367,650.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	5,680,454.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	85,207.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,595,247.
6	Minimum investment return. Enter 5% of line 5	6	279,762.

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

1	Minimum investment return from Part X, line 6	1	279,762.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	4,989.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	4,989.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	274,773.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	274,773.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	274,773.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	1,321,001.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:			
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	1,321,001.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,321,001.

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				274,773.
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	147,481.			
b From 2015	198,618.			
c From 2016	1,031,439.			
d From 2017	2,649,008.			
e From 2018	689,612.			
f Total of lines 3a through e	4,716,158.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$	1,321,001.			
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				274,773.
e Remaining amount distributed out of corpus	1,046,228.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	5,762,386.			
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	147,481.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	5,614,905.			
10 Analysis of line 9:				
a Excess from 2015	198,618.			
b Excess from 2016	1,031,439.			
c Excess from 2017	2,649,008.			
d Excess from 2018	689,612.			
e Excess from 2019	1,046,228.			

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ALS ASSOCIATION 30 W GUDE DRIVE, SUITE 150 ROCKVILLE, MD 20850	NONE	PUBLIC CHARITY	CHARITABLE	1,000.
ALZHEIMER'S DRUG DISCOVERY FOUNDATION 57 WEST 57TH STREET, SUITE 904 NEW YORK, NY 10019	NONE	PUBLIC CHARITY	CHARITABLE	1,000.
AMERICAN DIABETES ASSOCIATION 2451 CRYSTAL DR, STE 900 ARLINGTON, VA 22202	NONE	PUBLIC CHARITY	CHARITABLE	10,715.
AMERICAN FRIENDS OF KIDUM 59 EAST 54TH STREET SUITE 72 NEW YORK, NY 10022	NONE	PUBLIC CHARITY	CHARITABLE	8,750.
AMERICAN FRIENDS OF SHALVA 315 5TH AVENUE 6TH FLOO NEW YORK, NY 10016	NONE	PUBLIC CHARITY	CHARITABLE	9,643.
Total	SEE CONTINUATION SHEET(S)			1,294,837.
b Approved for future payment				
NONE				
Total				0.

ALAN & AMY MELTZER FAMILY FOUNDATION, INC 52-2069235

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
AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVE DALLAS, TX 75231	NONE	PUBLIC CHARITY	CHARITABLE	28,500.
AMERICAN ISRAEL EDUCATION FUND 251 H STREET, NW WASHINGTON, DC 20001	NONE	PUBLIC CHARITY	SOCIAL WELFARE	75,000.
AMERICAN UNIVERSITY HILLEL 4400 MASSACHUSETTS AVE, NW WASHINGTON, DC 20016	NONE	PUBLIC CHARITY	EDUCATIONAL	28,248.
ANTI-DEFAMATION LEAGUE IN CONCERT AGAINST HATE 1100 CONNECTICUT AVE., NW SUITE 1020 WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	CHARITABLE	5,000.
BEAT THE STREETS 3816 T STREET NW WASHINGTON, DC 20007	NONE	PUBLIC CHARITY	CHARITABLE	20,000.
BENDER JCC OF GREATER WASHINGTON 6125 MONTROSE ROAD ROCKVILLE, MD 20852	NONE	PUBLIC CHARITY	CHARITABLE	10,500.
BEST BUDDIES MARYLAND 101 N HAVEN STREET, #206 BALTIMORE, MD 21224	NONE	PUBLIC CHARITY	CHARITABLE	4,000.
BISHOP MCNAMARA HIGH SCHOOL 6800 MARLBORO PIKE FORTESVILLE, MD 20747	NONE	PUBLIC CHARITY	CHARITABLE	6,000.
BLAIR ACADEMY P.O. BOX 600 BLAIRSTOWN, NJ 07825	NONE	PUBLIC CHARITY	CHARITABLE	25,000.
BOSTON CASA, INC. P.O. BOX 8426 BOSTON, MA 02114	NONE	PUBLIC CHARITY	CHARITABLE	1,000.
Total from continuation sheets				1,263,729.

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
BOYS AND GIRLS CLUB OF GREATER WASHINGTON 4103 BENNING ROAD WASHINGTON, DC 20019	NONE	PUBLIC CHARITY	CHARITABLE	10,000.
BULLIS SCHOOL 10600 FALLS ROAD POTOMAC, MD 20854	NONE	PUBLIC CHARITY	EDUCATIONAL	24,900.
CAPITAL CAMPS & RETREAT CENTER 11300 ROCKVILLE PIKE, SUITE 407 ROCKVILLE, MD 20852	NONE	PRIVATE FOUNDATION	CHARITABLE	2,500.
CAPITAL JEWISH MUSEUM 1319 F STREET, NW #810 WASHINGTON, DC 20004	NONE	PUBLIC CHARITY	CHARITABLE	10,000.
CHARLES E SMITH JEWISH DAY SCHOOL 1901 EAST JEFFERON STREET ROCKVILLE, MD 20852	NONE	PUBLIC CHARITY	EDUCATIONAL	10,500.
CHARLES E. SMITH LIFE COMMUNITIES 6121 MONTROSE ROAD ROCKVILLE, MD 20852	NONE	PUBLIC CHARITY	CHARITABLE	65,125.
CHESAPEAKE CATS & DOGS 325 WYE MILLS ROAD QUEENSTOWN, MD 21658	NONE	PUBLIC CHARITY	CHARITABLE	200.
CHILDREN'S HOSPITAL FOUNDATION 111 MICHIGAN AVENUE, NW WASHINGTON, DC 20010	NONE	PUBLIC CHARITY	CHARITABLE	25,000.
CITY YEAR WASHINGTON DC 287 COLUMBUS AVE BOSTON, MA 02116	NONE	PUBLIC CHARITY	CHARITABLE	1,500.
COLORECTAL CANCER ALLIANCE 1025 VERMONT AVENUE NW WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	CHARITABLE	5,000.
Total from continuation sheets				

ALAN & AMY MELTZER FAMILY FOUNDATION, INC 52-2069235

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
CONGRESSIONAL SCHOOL 3229 SLEEPY HOLLOW ROAD FALLS CHURCH, VA 22042	NONE	PUBLIC CHARITY	CHARITABLE	31,250.
CORNERSTONE MONTGOMERY 6040 SOUTHPORT DRIVE BETHESDA, MD 20814	NONE	PUBLIC CHARITY	CHARITABLE	14,706.
COWEN INSTITUTE 1555 POYDRAS STREET, SUITE 700 NEW ORLEANS, LA 70112	NONE	PUBLIC CHARITY	CHARITABLE	10,415.
DAVID POSNACK JDS 5810 SOUTH PINE ROAD DAVIE, FL 33328	NONE	PUBLIC CHARITY	CHARITABLE	5,033.
DEMATHA HIGH SCHOOL 4313 MADISON STREET HYATTSVILLE, MD 20781	NONE	PUBLIC CHARITY	CHARITABLE	8,000.
DIABETES RESEARCH INSTITUTE 200 S. PARK ROAD, SUITE 100 HOLLYWOOD, FL 33021	NONE	PUBLIC CHARITY	CHARITABLE	5,000.
E.L. HAYNES PUBLIC CHARTER SCHOOL 3600 GEORGIA AVENUE, NW WASHINGTON, DC 20010	NONE	PUBLIC CHARITY	CHARITABLE	13,000.
EASTER SEALS 2800 13TH STREET NW WASHINGTON, DC 20009	NONE	PUBLIC CHARITY	CHARITABLE	14,000.
ED LAVITCH DC JEWISH COMMUNITY CENTER 1529 16TH ST., NW WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	CHARITABLE	39,006.
EDIBLE SCHOOLYARD NEW ORLEANS 300 BROAD STREET NEW ORLEANS, LA 70119	NONE	PUBLIC CHARITY	CHARITABLE	2,500.
Total from continuation sheets				

ALAN & AMY MELTZER FAMILY FOUNDATION, INC 52-2069235

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
EINSTEIN CHARTER SCHOOLS 4801 MAID MARION BLVD NEW ORLEANS, LA 70128	NONE	PUBLIC CHARITY	CHARITABLE	5,000.
ENDOWMENT FUND OF MACCABI USA 5850 S PINE ISLAND ROAD DAVIE, FL 33328	NONE	PUBLIC CHARITY	CHARITABLE	2,525.
FAITH CONNECTIONS 10100 LEWIS DRIVE DAMASCUS, MD 20872	NONE	PUBLIC CHARITY	CHARITABLE	500.
FOOD AND FRIENDS 219 RIGGS RD NE WASHINGTON, DC 20011	NONE	PUBLIC CHARITY	CHARITABLE	2,500.
FOUNDATION OF SCIENCE AND MATH 5625 LOYOLA AVENUE NEW ORLEANS, LA 70115	NONE	PUBLIC CHARITY	CHARITABLE	4,167.
FRIENDS OF CANCER RESEARCH 1800 M STREET NW, SUITE 1050 SOUTH WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	CHARITABLE	2,500.
FRIENDS OF KIPP NEW ORLEANS INC 2600 VIRGINIA AVENUE NW WASHINGTON, DC 20037	NONE	PUBLIC CHARITY	CHARITABLE	5,000.
FRIENDSHIP PLACE 4713 WISCONSIN AVE NW WASHINGTON, DC 20016	NONE	PUBLIC CHARITY	CHARITABLE	8,750.
GIRL SCOUT COUNCIL OF THE NATIONS CAPITAL 4301 CONNECTICUT AVE NW, SUITE M-2 WASHINGTON, DC 20008	NONE	PUBLIC CHARITY	CHARITABLE	10,000.
GREATER MIAMI JEWISH FEDERATION 4200 BISCAYNE BLVD MIAMI, FL 33137	NONE	PUBLIC CHARITY	CHARITABLE	25,000.
Total from continuation sheets				

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
GREATER WASHINGTON COMMUNITY FOUNDATION 415 MICHIGAN AVE., NE SUITE 250 WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	CHARITABLE	3,750.
HIDDEN LIGHT INSTITUTE 5281 SOUTH EMORIA COURT GREENWOOD VILLAGE, CO 80111	NONE	PUBLIC CHARITY	CHARITABLE	12,500.
JCC ASSOCIATION 520 EIGHTH AVENUE NEW YORK, NY 10018	NONE	PUBLIC CHARITY	CHARITABLE	9,000.
JCC OF NORTHERN VIRGINIA 8900 LITTLE RIVER TPKE FAIRFAX, VA 22031	NONE	PUBLIC CHARITY	CHARITABLE	9,000.
JDRF INTERNATIONAL 26 BROADWAY, 15TH FLOOR NEW YORK, NY 10004	NONE	PUBLIC CHARITY	CHARITABLE	55,000.
JEWISH COMMUNITY RELATIONS COUNCIL 6101 MONTROSE RD #205 ROCKVILLE, MD 20852	NONE	PUBLIC CHARITY	CHARITABLE	20,400.
JEWISH FEDERATION OF BROWARD COUNTY 5890 S PINE ISLAND ROAD FT LAUDERDALE, FL 33328	NONE	PUBLIC CHARITY	CHARITABLE	55,022.
JEWISH FEDERATION OF GREATER NEW ORLEANS 3747 W. ESPLANADE AVE N METAIRIE, LA 70002	NONE	PUBLIC CHARITY	CHARITABLE	1,800.
JEWISH FEDERATION OF GREATER WASHINGTON 6101 MONTROSE RD ROCKVILLE, MD 20852	NONE	PUBLIC CHARITY	CHARITABLE	100,000.
JEWISH FEDERATION OF MIAMI 4200 BISCAYNE BOULEVARD MIAMI, FL 33137	NONE	PUBLIC CHARITY	CHARITABLE	25,000.
Total from continuation sheets				

ALAN & AMY MELTZER FAMILY FOUNDATION, INC 52-2069235

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
JEWISH FEDERATION OF PALM BEACH COUNTY 4601 COMMUNITY DRIVE WEST PALM BEACH, FL 33417	NONE	PUBLIC CHARITY	CHARITABLE	50,000.
JOSHUA M FREEMAN FOUNDATION 18153 VILLAGE CENTER DR OLNEY, MD 20832	NONE	PUBLIC CHARITY	CHARITABLE	20,100.
KINGSLEY HOUSE 1600 CONSTANCE STREET NEW ORLEANS, LA 70130	NONE	PUBLIC CHARITY	CHARITABLE	3,125.
KIPP DC 1003 K STREET NW, SUITE 700 WASHINGTON, DC 20001	NONE	PUBLIC CHARITY	EDUCATIONAL	10,000.
LATIN AMERICAN YOUTH CENTER 1419 COLUMBIA ROAD NW WASHINGTON, DC 20009	NONE	PUBLIC CHARITY	CHARITABLE	11,750.
LEARN SERVE INTERNATIONAL PO BOX 6203 WASHINGTON, DC 20015	NONE	PUBLIC CHARITY	CHARITABLE	1,000.
LIFEBRIDGE HEALTH 2401 W. BELVEDERE AVE BALTIMORE, MD 21215	NONE	PUBLIC CHARITY	CHARITABLE	5,000.
LUTHERAN SOCIAL SERVICE 4406 GEORGIA AVE, NW WASHINGTON, DC 20011	NONE	PUBLIC CHARITY	CHARITABLE	2,500.
MARTHA'S TABLE 2204 MARTIN LUTHER KING JR AVE SE WASHINGTON, DC 20020	NONE	PUBLIC CHARITY	CHARITABLE	20,000.
MARY'S CENTER 2333 ONTARIO ROAD, NW WASHINGTON, DC 20009	NONE	PUBLIC CHARITY	CHARITABLE	13,890.
Total from continuation sheets				

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
MARYLAND STATE WRESTLING ASSOCIATION 7920 KAVANAGH RD BALTIMORE, MD 21222	NONE	PUBLIC CHARITY	CHARITABLE	5,000.
MIAMI JEWISH HEALTH 5200 NE 2ND AVENUE MIAMI, FL 33137	NONE	PUBLIC CHARITY	CHARITABLE	16,700.
MILES MEMORIAL CME CHURCH 13302 CRESTMAR COURT UPPER MARLBORO, MD 20772	NONE	PUBLIC CHARITY	CHARITABLE	500.
MONTGOMERY YOUTH WRESTLING LEAGUE 7502 OLDCHESTER ROAD BETHESDA, MD 20817	NONE	PUBLIC CHARITY	CHARITABLE	45,000.
MOUNT SINAI MEDICAL CTR FOUNDATION 4300 ALTON ROAD, ASCHER BUILDING #100 MIAMI BEACH, FL 33140	NONE	PUBLIC CHARITY	CHARITABLE	3,500.
NATIONAL CENTER FOR CHILDREN & FAMILIES 6301 GREENTREE ROAD BETHESDA, MD 20817	NONE	PUBLIC CHARITY	CHARITABLE	6,000.
NATIONAL CHILDREN'S CENTER 8757 GEORGIA AVENUE, SUITE 700 SILVER SPRING, MD 20910	NONE	PUBLIC CHARITY	CHARITABLE	6,090.
NATIONAL WRESTLING COACHES ASSOCIATION P.O. BOX 254 MANHEIM, PA 17545	NONE	PUBLIC CHARITY	CHARITABLE	7,500.
NEWBERRY COLLEGE 2100 COLLEGE STREET NEWBERRY, SC 29108	NONE	EDUCATIONAL	CHARITABLE	2,500.
OHR HATZABUN PRODUCTIONS 5281 SOUTH EMORIA COURT GREENWOOD VILLAGE, CO 80111	NONE	PUBLIC CHARITY	CHARITABLE	6,250.
Total from continuation sheets				

ALAN & AMY MELTZER FAMILY FOUNDATION, INC 52-2069235

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
ORT AMERICA 6917 ARLINGTON RD, #203 BETHESDA, MD 20814	NONE	PUBLIC CHARITY	CHARITABLE	6,875.
OUR LADY OF GOOD COUNSEL HIGH SCHOOL 17301 OLD VIC BOULEVARD OLNEY, MD 20832	NONE	EDUCATIONAL	EDUCATIONAL	16,875.
PEN FED FOUNDATION P.O. BOX 1432 ALEXANDRIA, VA 22313-2032	NONE	PUBLIC CHARITY	CHARITABLE	6,250.
RICHARD WRIGHT PUBLIC CHARTER SCHOOL A770 M STEET, SE WASHINGTON, DC 20003	NONE	PUBLIC CHARITY	CHARITABLE	1,500.
SHARE OUR STRENGTH 1730 M STREET NW, STE 700 WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	CHARITABLE	20,313.
SHELTER HOUSE 12310 PINECREST ROAD SUITE 304 RESTON, VA 20191	NONE	PUBLIC CHARITY	CHARITABLE	17,500.
SHEPHERDS TABLE 8106 GEORGIA AVENUE SILVER SPRING, MD 20910	NONE	PUBLIC CHARITY	CHARITABLE	5,500.
SIXTH AND I SYNAGOGUE 600 I STREET NW WASHINGTON, DC 20001	NONE	PUBLIC CHARITY	CHARITABLE	4,800.
SOS INTERNATIONAL 1881 CAMPUS COMMONS DRIVE RESTON, VA 20191	NONE	PUBLIC CHARITY	CHARITABLE	3,600.
STODDARD BAPTIST HOME FOUNDATION 1818 NEWTON STREET, NW WASHINGTON, DC 20010	NONE	PUBLIC CHARITY	CHARITABLE	6,000.
Total from continuation sheets				

ALAN & AMY MELTZER FAMILY FOUNDATION, INC 52-2069235

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
SULAM 13300 ARCTIC AVENUE ROCKVILLE, MD 20853	NONE	PUBLIC CHARITY	CHARITABLE	5,000.
THE ISRAEL PROJECT 2020 K STREET, NW WASHINGTON, DC 20006	NONE	PUBLIC CHARITY	CHARITABLE	1,900.
THE LAB SCHOOL 4759 RESERVOIR ROAD, NW WASHINGTON, DC 20007	NONE	EDUCATIONAL	CHARITABLE	10,000.
THE SEED FOUNDATION 1776 MASSACHUSETTS AVE NW SUITE 600 WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	CHARITABLE	13,414.
TORAH SCHOOL OF GREATER WASHINGTON 2010 LINDEN LANE SILVER SPRING, MD 20910	NONE	PUBLIC CHARITY	CHARITABLE	500.
TREATMENT AND LEARNING CENTERS 2301 RESEARCH BOULEVARD, SUITE 110 ROCKVILLE, MD 20850	NONE	PUBLIC CHARITY	CHARITABLE	4,000.
UNIVERSITY OF MARYLAND WRESTLING UNIVERSITY OF MARYLAND COLLEGE PARK, MD 20742	NONE	PUBLIC CHARITY	CHARITABLE	2,500.
UNIVERSITY OF NEW HAMPSHIRE STOKE HALL, 11 GARRISON AVENUE DURHAM, NH 03824-3511	NONE	PUBLIC CHARITY	CHARITABLE	10,000.
USA WRESTLING 655 LEHMAN DRIVE COLORADO SPRINGS, CO 80918	NONE	PUBLIC CHARITY	CHARITABLE	4,500.
WASHINGTON BALLET 1667 K STREET NW, #520 WASHINGTON, DC 20006	NONE	PUBLIC CHARITY	CHARITABLE	5,000.
Total from continuation sheets				

[illegible]

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

- | | | Yes | No |
|---|--|-------|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)(3) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| | a Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| | b Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | 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		

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

 11/12/20 **PRESIDENT**

Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below? See instr. ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature 	Date NOV 13 2020	Check ☐ if self-employed	PTIN P00169171
	Firm's name ▶ ROBERT PHILIPSON & CO			Firm's EIN ▶ 53-0126010	
	Firm's address ▶ 8601 GEORGIA AVE. STE 1001 SILVER SPRING, MD 20910			Phone no. 301-608-3900	

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

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

OMB No 1545-0047

2019

Name of the organization

ALAN & AMY MELTZER FAMILY FOUNDATION, INC

Employer identification number

52-2069235

Organization type (check one).

Filers of:**Section:**

Form 990 or 990-EZ

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

Form 990-PF

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

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

Special Rules

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

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

Name of organization	Employer identification number
ALAN & AMY MELTZER FAMILY FOUNDATION, INC	52-2069235

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	ALAN AND AMY MELTZER 3230 W. COMMERCIAL BLVD, SUITE 360 FT. LAUDERDALE, FL 33309	\$ 866,788.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

ALAN & AMY MELTZER FAMILY FOUNDATION, INC

52-2069235

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Employer identification number

ALAN & AMY MELTZER FAMILY FOUNDATION, INC**52-2069235**

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 INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
AFFORDABLE MINI STORAGE OF GREENBELT LLC	81.	81.	81.
BLUE WATER FUNDING LLC	149.	149.	149.
BRYNA TECHNOLOGIES INC	4,822.	4,822.	4,822.
CHARLES SCHWAB	44.	44.	44.
CLEANTECH MARYLAND INVESTORS, LLC	87.	87.	87.
COCO OCHO LLC	18.	18.	18.
DOUBLE EDGE SWORD PARTNERS	1.	1.	1.
FRIENDS I LLC	29.	29.	29.
FRIENDS V LLC	6.	6.	6.
FRIENDS XV, LLC	1.	1.	1.
FRIENDS XX, LLC	12.	12.	12.
FRIENDS XXV, LLC	88.	88.	88.
FRIENDS XXVI LLC	23.	23.	23.
FRIENDS XXX, LLC	474.	474.	474.
HILLTOP PLAZA HOLDINGS, LLC	3.	3.	3.
JBG SMITH PROPERTIES LP	214.	214.	214.
NAV OPPORTUNITIES FUND II LP	1.	1.	1.
PENNY LANE PARTNERS	539.	239.	539.
PRUDENT CAPITAL EQUITIES VI LP	25.	25.	25.
ROLLINS MRP I LLC	1,367.	1,367.	1,367.
ROLLINS VELSOR GATEWAY LLC	6.	6.	6.
RON COHEN LOAN FUNDING	21,889.	21,889.	21,889.
ROSENTHAL PROPERTIES INVESTMENT FUND, LLC	32.	32.	32.
SCUDDER BAY CAPITAL LLC	54.	54.	54.
SILVER OAK INVESTORS, LLC	2.	2.	2.
UC MEZZ LOAN INVESTORS	12,304.	12,304.	12,304.
UIP ONYX INVEST LLC	8.	8.	8.
TOTAL TO PART I, LINE 3	42,279.	41,979.	42,279.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ALTABA	45,344.	45,012.	332.	332.	332.
CHARLES SCHWAB	16,862.	1,536.	15,326.	15,326.	15,326.
COCO OCHO LLC	114.	0.	114.	114.	114.
FRIENDS I LLC	2.	0.	2.	2.	2.
FRIENDS V LLC	2.	0.	2.	2.	2.
FRIENDS XV LLC	7.	0.	7.	7.	7.
FRIENDS XX, LLC	21.	0.	21.	21.	21.
FRIENDS XXVI, LLC	65.	0.	65.	65.	65.
JBG SMITH PROPERTIES LP	1,123.	0.	1,123.	1,123.	1,123.
MERRILL LYNCH ESCROW PAYMENTS	1,093.	0.	1,093.	1,093.	1,093.
PENNY LANE PARTNERS	18.	0.	18.	18.	18.
UNITED BANKSHARES INC	9,743.	0.	9,743.	9,743.	9,743.
TO PART I, LINE 4	74,394.	46,548.	27,846.	27,846.	27,846.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FRIENDS I LLC	1,215.	1,215.	0.
SCUDDER BAY CAPITAL LLC	20,805.	20,805.	0.
FRIENDS V LLC	-27.	-27.	0.
AFFORDABLE MINI STORAGE OF GREENBELT, LLC	7,924.	7,924.	0.
FRIENDS XV, LLC	-89.	-89.	0.
FRIENDS XX, LLC	2,874.	2,874.	0.
SILVER OAK INVESTORS LLC	3,736.	3,736.	0.
CLEANTECH MARYLAND INVESTORS, LLC	-583.	-583.	0.
FRIENDS XXV, LLC	-4,158.	-4,158.	0.
DOUBLE EDGE SWORD PARTNERS	7,005.	7,005.	0.
FRIENDS XXVI LLC	5,054.	5,054.	0.
COCO OCHO LLC	-2,684.	-2,684.	0.
ROSENTHAL PROPERTIES INVESTMENT FUND, LLC	5,930.	5,930.	0.
PENNY LANE PARTNERS	193.	193.	0.
ROLLINS MRP I LLC	4,485.	4,485.	0.
PRUDENT CAPITAL EQUITIES	7,424.	7,424.	0.

DIAMOND STATE HOTEL XXXIX INVESTORS LLC	-3,556.	-3,556.	0.
HILLTOP PLAZA HOLDINGS LLC	-29,612.	-29,612.	0.
RMC - H STREET, LLC	-134.	-134.	0.
FRIENDS ORLO, LLC	-4,946.	-4,946.	0.
HILLTOP OUTPARCEL, LLC	-18.	-18.	0.
BPG HOTEL INVESTORS XLI LLC	-35,063.	-35,063.	0.
UC MEZZ LOAN INVESTORS	-1,251.	-1,251.	0.
UIP ONYX INVEST LLC	-6,433.	-6,433.	0.
COCO FOLE	-1,367.	-1,367.	0.
JBG SMITH PROPERTIES LP	3,818.	3,818.	0.
ROLLINS MRP III, LLC	-1,539.	-1,539.	0.
ROLLINS VELSOR GATEWAY, LLC	-39,434.	-39,434.	0.
PENULTIMATE PARTNERS IV	59.	59.	0.
STATE INCOME TAX REFUNDS	321.	321.	0.
TOTAL TO FORM 990-PF, PART I, LINE 11	-60,051.	-60,051.	0.

FORM 990-PF	LEGAL FEES			STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	57,084.	42,813.	0.	14,271.
TO FM 990-PF, PG 1, LN 16A	57,084.	42,813.	0.	14,271.

FORM 990-PF	ACCOUNTING FEES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	19,143.	14,357.	0.	4,786.
TO FORM 990-PF, PG 1, LN 16B	19,143.	14,357.	0.	4,786.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	1,717.	1,717.	0.	0.
CONSULTING FEES	28,428.	21,321.	0.	7,107.
TO FORM 990-PF, PG 1, LN 16C	30,145.	23,038.	0.	7,107.

FORM 990-PF	TAXES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE TAXES WITHHELD FROM PASS-THROUGH ENTITIES	657.	657.	0.	0.
FOREIGN TAXES	348.	348.	0.	0.
TO FORM 990-PF, PG 1, LN 18	1,005.	1,005.	0.	0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	8
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK CHARGES	101.	101.	0.	0.
LIFE INSURANCE PREMIUM	5,970.	0.	0.	0.
OTHER DEDUCTIONS	10.	10.	0.	0.
DEDUCTIONS RELATED TO PORTFOLIO INCOME	11,371.	11,371.	0.	0.
BAD DEBTS	50,000.	50,000.	0.	0.
TO FORM 990-PF, PG 1, LN 23	67,452.	61,482.	0.	0.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	9
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DESCRIPTION	AMOUNT
APPRECIATION ON STOCK DONATED TO CHARITABLE ORGANIZATION	30,831.
PRIOR YEAR ADJUSTMENTS	348,099.
RECOVERY OF BANK ACCOUNT BALANCE	1,034.
TOTAL TO FORM 990-PF, PART III, LINE 3	379,964.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	10
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DESCRIPTION	AMOUNT
NON-DEDUCTIBLE EXPENSES FROM PASS-THROUGH ENTITIES	420.
OTHER NON-DEDUCTIBLE EXPENSES	25,431.
SUSPENDED LOSSES FROM PARTNERSHIPS DUE TO AT RISK LIMITATIONS	75,703.
TOTAL TO FORM 990-PF, PART III, LINE 5	101,554.

FORM 990-PF	CORPORATE STOCK	STATEMENT	11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
FIRST HORIZON NATIONAL CORP (FKA CAPITAL BANK)	93,040.	198,174.
MERRILL LYNCH	0.	610.
SCHWAB - SECURITIES	747,442.	1,136,328.
SECURITY DEVICES INTERNATIONAL	225,000.	291,900.
SWEETGREEN	115,660.	910,643.
UNITED BANKSHARES (FKA BANK OF GEORGETOWN)	99,993.	276,674.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,281,135.	2,814,329.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 12

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
AFFORDABLE MINI STORAGE	COST	34,697.	34,697.
BDC PROPERTIES LLC	COST	96,755.	50,003.
BSV CROMWELL PARENT LLC	COST	150,000.	150,000.
CLEANTECH MARYLAND INVESTOR	COST	53,576.	430.
COCO FOLES	COST	74,139.	74,139.
COCO OCHO LLC	COST	11,208.	11,208.
DIAMOND STATE HOTEL XXXIX INVESTORS LLC	COST	35,702.	37,099.
DOUBLE EDGE SWORD PARTNERS	COST	24,184.	24,184.
FRIENDS ORLO LLC	COST	70,547.	70,547.
FRIENDS V, LLC	COST	4,581.	4,581.
FRIENDS XV LLC	COST	4,479.	4,479.
FRIENDS XX, LLC	COST	21,250.	21,250.
FRIENDS XXVI, LLC	COST	74,689.	74,689.
FRIENDS XXXVII	COST	150,000.	150,000.
HILLTOP OUTPARCEL, LLC	COST	6,003.	6,003.
HILLTOP PLAZA HOLDINGS, LLC	COST	116,838.	116,838.
JBG SMITH PROPERTIES LP	COST	128,876.	151,384.
LECKNER FORD THREE, LLC	COST	56,123.	58,997.
LECKNER FORD TWO, LLC	COST	48,919.	52,620.
LECKNER NISSAN THREE, LLC	COST	18,603.	18,001.
LOTS OF GREEN, LLC	COST	910.	910.
MASS MUTUAL CASH SURRENDER VALUE	COST	348,135.	348,135.
NAV OPPORTUNITY FUND II LP	COST	40,791.	39,982.
PENNY LANE PARTNERS	COST	89,478.	89,472.
PENULTIMATE PARTNERS IV	COST	20,730.	20,730.
PRUDENT CAPITAL EQUITIES VI	COST	1,009.	1,009.
RIXEY LLC	COST	100,000.	100,000.
RMC-H STREET, LLC	COST	249,732.	249,732.
ROLLINS MRP I LLC	COST	42,899.	38,519.
ROLLINS MRP III LLC	COST	38,247.	38,247.
ROLLINS VELSOR GATEWAY LLC	COST	61,560.	61,560.
ROSENTHAL PROPERTY INVESTMENTS	COST	97,027.	98,484.
SCUDDER BAY CAPITAL, LLC	COST	287,196.	220,764.
UIP ONYX INVEST LLC	COST	170,860.	132,263.
WATCHES	COST	550,000.	550,000.
TOTAL TO FORM 990-PF, PART II, LINE 13		3,279,743.	3,100,956.

FORM 990-PF	OTHER ASSETS		STATEMENT 13
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
PARTNERSHIP DISTRIBUTIONS RECEIVABLE	4,735.	18,256.	18,256.
TO FORM 990-PF, PART II, LINE 15	4,735.	18,256.	18,256.

FORM 990-PF	OTHER NOTES AND LOANS PAYABLE	STATEMENT 14
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LENDER'S NAME	TERMS OF REPAYMENT	SECURITY PROVIDED BY BORROWER
EAGLE BANK	ON DEMAND	PUBLICLY TRADED SECURITIES

DATE OF NOTE	MATURITY DATE	ORIGINAL LOAN AMOUNT	INTEREST RATE	PURPOSE OF LOAN
		300,000.	5.50%	CASH FLOW FOR CONTRIBUTIONS

RELATIONSHIP OF LENDER

BANK

DESCRIPTION OF CONSIDERATION	FMV OF CONSIDERATION	BALANCE DUE
CASH	0.	269,390.

LENDER'S NAME	TERMS OF REPAYMENT	SECURITY PROVIDED BY BORROWER
MASSACHUSETTS MUTUAL		LIFE INSURANCE POLICY

DATE OF NOTE	MATURITY DATE	ORIGINAL LOAN AMOUNT	INTEREST RATE	PURPOSE OF LOAN
06/13/19		300,000.	4.00%	CASH FLOW FOR CONTRIBUTIONS

RELATIONSHIP OF LENDER

INSURANCE COMPANY

DESCRIPTION OF CONSIDERATION	FMV OF CONSIDERATION	BALANCE DUE
CASH	0.	300,000.

TOTAL TO FORM 990-PF, PART II, LINE 21, COLUMN B	569,390.
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FORM 990-PF	OTHER LIABILITIES	STATEMENT 15
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
BPG HOTEL SPECIAL XLI	0.	34,428.
COCO OCHO LLC	14,000.	0.
DUE TO FRIENDS XXV	325.	0.
DUE TO LECKNER FORD THREE, LLC	4,602.	4,602.
DUE TO LECKNER FORD TWO, LLC	7,528.	7,528.
EAGLE BANK	0.	50,319.
FRIENDS I LLC	8,978.	6,179.
FRIENDS XXX, LLC	446,916.	522,145.
SILVER OAK INVESTORS	27,557.	23,819.
TOTAL TO FORM 990-PF, PART II, LINE 22	509,906.	649,020.

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT 16
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NAME OF CONTRIBUTOR	ADDRESS
ALAN L. MELTZER	3230 W. COMMERCIAL BLVD, SUITE 360 FT. LAUDERDALE, FL 33309

FORM 990-PF

REDUCTION EXPLANATION
PART X, LINE 1E

STATEMENT 17

EXPLANATION FOR REDUCTION CLAIMED FOR BLOCKAGE OR OTHER FACTORS

PARTNERSHIP, LIMITED LIABILITY COMPANIES, NOTES RECEIVABLE, AND OTHER INVESTMENTS REPORTED ON THE RETURN THAT ARE PRIVATELY HELD AND NOT READILY MARKETABLE.

FAIR MARKET VALUE BEFORE REDUCTION: \$3,676,501

AMOUNT OF REDUCTION IS 10% OF THE VALUE OR \$367,650.