

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

Name of foundation JACOB & ANITA PENZER FOUNDATION		A Employer identification number 65-0710609	
Number and street (or P.O. box number if mail is not delivered to street address) CO R PENZER 81 HARBORVIEW WEST		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code LAWRENCE, NY 115591911		B Telephone number (see instructions) (516) 375-2190	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ 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) ▶\$ 26,251,115		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	0			
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	434,843	434,843		
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	434,843	434,843		
	13 Compensation of officers, directors, trustees, etc.	838,836	56,350		782,486
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	179,554	43,000		136,554
	b Accounting fees (attach schedule)	50,140	2,460		47,680
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	10,000	0		0
	19 Depreciation (attach schedule) and depletion	569	0		
	20 Occupancy	33,993	0		33,993
	21 Travel, conferences, and meetings	52,898	0		52,898
	22 Printing and publications				
	23 Other expenses (attach schedule)	117,792	18,422		99,370
	24 Total operating and administrative expenses. Add lines 13 through 23	1,283,782	120,232		1,152,981
	25 Contributions, gifts, grants paid	560,078			560,078
	26 Total expenses and disbursements. Add lines 24 and 25	1,843,860	120,232		1,713,059
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-1,409,017			
	b Net investment income (if negative, enter -0-)		314,611		
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	19,480,152	16,846,410	16,846,410
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ 503,000 Less: allowance for doubtful accounts ▶ _____ 0	65,000	503,000	503,000
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)	6,103,170	6,228,162	6,228,162
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	2,038,693	2,672,119	2,672,119
	14 Land, buildings, and equipment: basis ▶ _____ 10,506 Less: accumulated depreciation (attach schedule) ▶ _____ 9,082	1,993	1,424	1,424
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	27,689,008	26,251,115	26,251,115	
Liabilities	17 Accounts payable and accrued expenses	36,933	8,057	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)	123,328	123,328	
	23 Total liabilities (add lines 17 through 22)	160,261	131,385	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☒ and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	27,528,747	26,119,730	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
29 Total net assets or fund balances (see instructions)	27,528,747	26,119,730		
30 Total liabilities and net assets/fund balances (see instructions) .	27,689,008	26,251,115		

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	27,528,747
2 Enter amount from Part I, line 27a	2	-1,409,017
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	26,119,730
5 Decreases not included in line 2 (itemize) ▶ _____	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	26,119,730

Part IV Capital Gains and Losses for Tax on Investment Income

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

(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			
b			
c			
d			
e			

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

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

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

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

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

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



Yes



No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	1,628,965	24,375,441	0.066828
2017	793,661	19,361,670	0.040991
2016	18,902	5,011,790	0.003772
2015	8,838	4,676	1.890077
2014	1,146	4,734	0.242079

2 Total of line 1, column (d)	2	2.243747
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.448749
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	22,191,699
5 Multiply line 4 by line 3	5	9,958,503
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,146
7 Add lines 5 and 6	7	9,961,649
8 Enter qualifying distributions from Part XII, line 4	8	1,713,059

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	6,292
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	6,292
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	6,292
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	8,107
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	5,000
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	13,107
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	6,815
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax ▶ 6,815 Refunded ▶	11	0

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	Yes	
14	The books are in care of ► <u>RICHARD PENZER</u> Telephone no. ► <u>(516) 375-2190</u>			

Located at ► 81 HARBORVIEW WEST LAWRENCE NY ZIP+4 ► 11559

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		
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", 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):		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		
	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?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019? ☐ Yes ☒ No			
	If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☒ Yes ☐ No			
b	If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2019.)	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b		No

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

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

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
ELIE HECHT C/O LIFE 112 SPRUCE STREET CEDARHURST, NY 11516	LEGAL	107,500
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	0
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	8,212,620
b	Average of monthly cash balances.	1b	11,989,126
c	Fair market value of all other assets (see instructions).	1c	2,327,898
d	Total (add lines 1a, b, and c).	1d	22,529,644
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	22,529,644
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	337,945
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	22,191,699
6	Minimum investment return. Enter 5% of line 5.	6	1,109,585

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	1,109,585
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	6,292
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	6,292
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,103,293
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,103,293
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	1,103,293

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	1,713,059
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	1,713,059
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,713,059

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				1,103,293
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2019:				
a From 2014.				
b From 2015.				
c From 2016.				
d From 2017.				115,196
e From 2018.				415,204
f Total of lines 3a through e.	530,400			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ <u>1,713,059</u>				
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.				1,103,293
e Remaining amount distributed out of corpus	609,766			
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	1,140,166			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a.	1,140,166			
10 Analysis of line 9:				
a Excess from 2015.				
b Excess from 2016.				
c Excess from 2017.				115,196
d Excess from 2018.				415,204
e Excess from 2019.				609,766

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

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

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

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

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

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

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

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

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

c Any submission deadlines:

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	560,078
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated.

[illegible]

Part XVII

- | | | | |
|--|--|-----|----|
| | | Yes | No |
|--|--|-----|----|

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- | | | |
|-------|--|----|
| 1a(1) | | No |
| 1a(2) | | No |

--	--	--

- | | | |
|--------------|--|-----------|
| 1b(1) | | No |
| 1b(2) | | No |
| 1b(3) | | No |
| 1b(4) | | No |
| 1b(5) | | No |
| 1b(6) | | No |

1c		No
----	--	----

value
ue

[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

Signature of officer or trustee _____ Date 2020-11-16 Title _____

Print/Type preparer's name WILLIAM A VOGEL	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00209076
Firm's name ▶ COOPERSMITH SIMON & VOGEL PC				Firm's EIN ▶ 27-0120069
Firm's address ▶ 50 CHARLES LINDBERGH BLVD STE 605 UNIONDALE, NY 11553				Phone no. (516) 483-5800

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ANITA PENZER 16882 RIVER BIRCH CIRCLE DELRAY BEACH, FL 334457055	VICE PRES / DIRECTOR 0.00	0	0	0
MICHAEL PENZER 81 HARBORVIEW WEST LAWRENCE, NY 115591911				
ARIEL PENZER 81 HARBORVIEW WEST LAWRENCE, NY 115591911	VICE PRES / DIRECTOR 5.00	76,336	0	0
RICHARD PENZER 81 HARBORVIEW WEST LAWRENCE, NY 115591911				
JACKI PENZER 81 HARBORVIEW WEST LAWRENCE, NY 115591911	VICE PRES / SECRETARY / DIRE 40.00	319,000	0	0
JACOB PENZER 81 HARBORVIEW WEST LAWRENCE, NY 115591911				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ACMIS C/O R PENZER 81 HARBORVIEW WEST LAWRENCE, NY 11559	NONE	501(C)(3)	GENERAL	500
AGUDAH OF WEST LAWRENCE 631 LANETT AVENUE FAR ROCKAWAY, NY 11691	NONE	501(C)(3)	GENERAL	16,600
AIPACPO BOX 4491 NEW YORK, NY 10163	NONE	501(C)(3)	GENERAL	610
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AISH KODESHPO BOX 361 WOODMERE, NY 11598	NONE	501(C)(3)	GENERAL	1,750
ALZHEIMER'S DISEASE & RELATED D 360 LEXINGTON AVENUE 3RD FLOOR NEW YORK, NY 10017	NONE	501(C)(3)	GENERAL	100
AMERICAN CANCER SOCIETY 250 WILLIAMS STREET NW ATLANTA, GA 30303	NONE	501(C)(3)	GENERAL	3,054
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN COUNCIL FOR THE BLIND 1703 N BEAUREGARD ST SUITE 420 ALEXANDRIA, VA 22311	NONE	501(C)(3)	GENERAL	800
ANN STORCK CENTER 1790 SW 43RD WAY FORT LAUDERDALE, FL 33317	NONE	501(C)(3)	GENERAL	350
AMERICAN FRIENDS315 5TH AVE NEW YORK, NY 10016	NONE	501(C)(3)	GENERAL	18
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ASPCA424 E 92ND ST NEW YORK, NY 10128	NONE	501(C)(3)	GENERAL	50
ARIELRIVKADANCE341 MONMOUTH ST JERSEY CITY, NJ 07302	NONE	501(C)(3)	GENERAL	280
AWOM3 N FEDERAL HWY DANIA BEACH, FL 33004	NONE	501(C)(3)	GENERAL	11,515
Total ► 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BLUE MISSION5701 SUNSET DR 128 SO MIAMI, FL 33143	NONE	501(C)(3)	GENERAL	5,508
BRANDEIS25 FROST LN LAWRENCE, NY 11559	NONE	501(C)(3)	GENERAL	194,919
BROWNSTONE EXPERIENCE FOUNDATION 224 E 12TH STREET NEW YORK, NY 10003	NONE	501(C)(3)	GENERAL	3,600
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CAVALLINO C/O R PENZER 81 HARBORVIEW WEST LAWRENCE, NY 11559	NONE	501(C)(3)	GENERAL	2,400
CHABAD OF THE FIVE TOWNS 74 MAPLE AVENUE CEDARHURST, NY 11516	NONE	501(C)(3)	GENERAL	7,058
CHAPMAN PARTNERSHIP 1550 N MIAMI AVE MIAMI, FL 33136	NONE	501(C)(3)	GENERAL	3,500
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CHIP COM HOUSING IMPRVMT PRGM 5 HANOVER STREET 1605 NEW YORK, NY 10004	NONE	501(C)(3)	GENERAL	400
CHRON'S COLITIS 733 THIRD AVENUE STE 510 NEW YORK, NY 10017	NONE	501(C)(3)	GENERAL	38
CMNH- DANCE MARATHON 205 WEST 700 SOUTH SALT LAKE CITY, UT 84101	NONE	501(C)(3)	GENERAL	54
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CONNECT 4 LIFE 880 DUNDAS STREET WEST UNIT 505 MISSISSAUGA L5C4H3 CA	NONE	501(C)(3)	GENERAL	54
CYSTIC FIBROSIS 4550 MONTGOMERY AVE SUITE 1100 N BETHESDA, MD 20814	NONE	501(C)(3)	GENERAL	256
DIABETES RESEARCH INSTITUTE FDN 200 S PARK ROAD SUITE 100 HOLLYWOOD, FL 33021	NONE	501(C)(3)	GENERAL	14,050
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DROR FOR THE WOUNDED 253 W 35TH ST NEW YORK, NY 10001	NONE	501(C)(3)	GENERAL	36
EB WINTER DISCO C/O R PENZER 81 HARBORVIEW WEST LAWRENCE, NY 11559	NONE	501(C)(3)	GENERAL	225
FAIRCHILD TROPICAL BOTANIC GARD 10901 OLD CUTLER RD CORAL GABLES, FL 33156	NONE	501(C)(3)	GENERAL	2,000
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FRIENDS OF UNITED HATZALA 208 E 51ST ST 303 NEW YORK, NY 10022	NONE	501(C)(3)	GENERAL	1,800
GAY MENS HEALH CRISIS 307 W 38TH ST NEW YORK, NY 10018	NONE	501(C)(3)	GENERAL	50
GIVE MIAMI DAY40 NW 3RD ST 305 MIAMI, FL 33128	NONE	501(C)(3)	GENERAL	1,045
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GMON HEIT C/O R PENZER 81 HARBORVIEW WEST LAWRENCE, NY 11559	NONE	501(C)(3)	GENERAL	153
GOODMAN JFS 5890 S PINE ISLAND RD STE 201 DAVIE, FL 33328	NONE	501(C)(3)	GENERAL	1,060
GSECDC514 NEWARK AVE NEW JERSEY, NJ 07306	NONE	501(C)(3)	GENERAL	300
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HABITAT FOR HUMANITY OF GREATER MIAMI 3800 NW 22ND AVE MIAMI, FL 33142	NONE	501(C)(3)	GENERAL	744
HAFTR635 CENTRAL AVE 2308 CEDARHURST, NY 11516	NONE	501(C)(3)	GENERAL	4,800
HERITAGE HOUSE 7 HAMALAKH STREET JEWISH QUARTER OLD CITY JERUSALEM IS	NONE	501(C)(3)	GENERAL	5,000
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JACKSON HOUSES RESIDENT'S ASSOC 765 COURTLAND AVE BRONX, NY 10451	NONE	501(C)(3)	GENERAL	500
JEC MEOR MANHATTAN38 W 13TH ST NEW YORK, NY 10011	NONE	501(C)(3)	GENERAL	1,000
JEWISH MUSEUM OF FLORIDA 301 WASHINGTON AVE MIAMI BEACH, FL 33139	NONE	501(C)(3)	GENERAL	12,600
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JEWISH NATIONAL FUND 78 RANDALL AVENUE ROCKVILLE CENTRE, NY 11570	NONE	501(C)(3)	GENERAL	610
LA-VATE8570 WILSHIRE BLDV 210 BEVERLY HILLS, CA 90211	NONE	501(C)(3)	GENERAL	5,000
LITTLE LIGHTHOUSE FOUNDATION 100 N BISCAYNE BLVD SUITE 1607 MIAMI, FL 33132	NONE	501(C)(3)	GENERAL	7,500
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LONG ISLAND TAX ANGELS 105 MAXESS RD MELVILLE, NY 11747	NONE	501(C)(3)	GENERAL	38,000
MCH FOUNDATION1001 DECARIE BLVD MONTREAL H4A 3J1 CA	NONE	501(C)(3)	GENERAL	5,000
MESAMSCH LEV1364 53RD ST BROOKLYN, NY 11219	NONE	501(C)(3)	GENERAL	100
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MIR YESHIVA1791 OCEAN PKWY BROOKLYN, NY 11223	NONE	501(C)(3)	GENERAL	4,000
MSCK85-18 117TH S RICHMOND HILL, NY 11418	NONE	501(C)(3)	GENERAL	54
NAMI4301 WILSON BLVD SUITE 300 ARLINGTON, VA 22203	NONE	501(C)(3)	GENERAL	36
Total ► 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NATIONAL REALTY CLUB 228 PARK AVE S 36611 NEW YORK, NY 10003	NONE	501(C)(6)	GENERAL	2,335
NETWORK FOR GOOD 1140 CONNECTICUT AVE NW 700 WASHINGTON, DC 20036	NONE	501(C)(3)	GENERAL	1,872
NEW CITY KIDS936 ALPINE AVE NW GRAND RAPIDS, MI 49504	NONE	501(C)(3)	GENERAL	11
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NFAA ARTS2100 BISCAYNE BOULEVARD MIAMI, FL 33137	NONE	501(C)(3)	GENERAL	2,500
NO MORE TEARS 151 N NOB HILL ROAD SUITE 152 PLANTATION, FL 33324	NONE	501(C)(3)	GENERAL	7,780
NY SYNAGOGUE1455 UNION STREET BROOKLYN, NY 11213	NONE	501(C)(3)	GENERAL	2,458
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
RED HOOK WEST RESIDENT ASSOC 55 DWIGHT ST BROOKLYN, NY 11231	NONE	501(C)(3)	GENERAL	5,484
RENEWAL5904 13TH AVE BROOKLYN, NY 11219	NONE	501(C)(3)	GENERAL	36
RESOLUTION PROJECT 420 LEXINGTON AVE 1626 NEW YORK, NY 10170	NONE	501(C)(3)	GENERAL	36
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ROBIN HOOD FOUNDATION 826 BROADWAY 9TH FLOOR NEW YORK, NY 10003	NONE	501(C)(3)	GENERAL	619
RUTGERS UNIVERSITY 57 US HIGHWAY 1 NEW BRUNSWICK, NJ 08901	NONE	501(C)(3)	GENERAL	15,000
SACRED HEART UNIV5151 PARK AVE FAIRFIELD, CT 06825	NONE	501(C)(3)	GENERAL	500
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SHABBAT DINNER224 E 12TH ST NEW YORK, NY 10003	NONE	501(C)(3)	GENERAL	55
SHAS ILLUMINATED25 OLYMPIA LANE WATERBURY, CT 06704	NONE	501(C)(3)	GENERAL	250
SINAI SCHOOLS240 FRISCH CT 100 PARAMUS, NJ 07652	NONE	501(C)(3)	GENERAL	180
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ST JUDE501ST JUDE PLACE MEMPHIS, TN 38105	NONE	501(C)(3)	GENERAL	104
STYLE SAVES109 NW 29TH ST MIAMI, FL 33127	NONE	501(C)(3)	GENERAL	1,000
SURFERS HEALINGPO BOX 1267 SAN JUAN CAPISTRANO, CA 92693	NONE	501(C)(3)	GENERAL	75
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TAG4-44 BEACH 6TH ST FAR ROCKAWAY, NY 11691	NONE	501(C)(3)	GENERAL	15,500
TEAM FRIENDSHIP816 EASTERN PKWY BROOKLYN, NY 11213	NONE	501(C)(3)	GENERAL	18
THE BASS MUSEUM2100 COLLINS AVE MIAMI BEACH, FL 33139	NONE	501(C)(3)	GENERAL	15,000
Total ► 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UJA FEDERATION130 E 59TH ST NEW YORK, NY 10022	NONE	501(C)(3)	GENERAL	7,053
VIZCAYA MUSEUM AND GARDENS 3251 S MIAMI AVE MIAMI, FL 33129	NONE	501(C)(3)	GENERAL	22,300
WOMEN OF TOMORROW 8400 NW 36TH STREET SUITE 450 DORAL, FL 33166	NONE	501(C)(3)	GENERAL	1,500
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
YAGDIL TORAH980 RAILROAD AVE WOODMERE, NY 11598	NONE	501(C)(3)	GENERAL	1,250
YESHIVA FAR ROCKAWAY 802 HICKSVILLE ROAD FAR ROCKAWAY, NY 11691	NONE	501(C)(3)	GENERAL	5,000
YJP - YOUNG JEWISH PROFESSIONAL 107 E 16TH ST NEW YORK, NY 10003	NONE	501(C)(3)	GENERAL	5,120
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALEPH BETA600 BAYVIEW AVE INWOOD INWOOD, NY 11096	NONE	501(C)(3)	GENERAL	180
ARSHT FUNDPO BOX 1636 WILMINGTON, DE 19899	NONE	501(C)(3)	GENERAL	300
BAHAMAS HURRICANE- GO FUND ME 855 JEFFERSON AVENUE PO BOX 1329 REDWOOD CITY, CA 94063	NONE	501(C)(3)	GENERAL	750
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
BAMBI INTERNATIONAL FOUNDATION 7751 KINSPOINTE PRWY STE 119 ORLANDO, FL 32819	NONE	501(C)(3)	GENERAL	560
BEIT RUTH EDUCATIONAL & THERAPUTIC VLGE 2 JERICHO PLAZA SUITE 111- WING A JERICHO, NY 11753	NONE	501(C)(3)	GENERAL	2,221
BIG BROTHER BIG SISTER MIAMI 550 NW 42ND AVE MIAMI, FL 33126	NONE	501(C)(3)	GENERAL	5,850
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BIKE 4 CHAI750 AIRPORT RD LAKEWOOD, NJ 08701	NONE	501(C)(3)	GENERAL	181
BIRTHRIGHTPO BOX 21615 NEW YORK, NY 10087	NONE	501(C)(3)	GENERAL	5
BOOKS FOR KIDS1632 1ST AVENUE 130 NEW YORK, NY 10028	NONE	501(C)(3)	GENERAL	103
Total ► 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOSTON BUDDIES II 19051 GOLDENWEST ST 106-145 HUNTINGTON BEACH, CA 92648	NONE	501(C)(3)	GENERAL	2,500
BOYS & GIRLS CLUBS 1275 PEACHTREE STREET NE ATLANTA, GA 30309	NONE	501(C)(3)	GENERAL	70
CHABAD YOUNG PROFESSIONALS 419 E 77TH STREET NEW YORK, NY 10007	NONE	501(C)(3)	GENERAL	18
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DANCERS WITH C/O R PENZER 81 HARBORVIEW WEST LAWRENCE, NY 11559	NONE	501(C)(3)	GENERAL	250
FIU FOUNDATION INC 11200 SW 8TH STREET MIAMI, FL 33199	NONE	501(C)(3)	GENERAL	160
GOFUNDME 855 JEFFERSON AVENUE PO BOX 1329 REDWOOD CITY, CA 94063	NONE	501(C)(3)	GENERAL	15
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HELPING A FRIEND C/O R PENZER 81 HARBORVIEW WEST LAWRENCE, NY 11559	NONE	501(C)(3)	GENERAL	18
ICSC-NY25 ELM PLACE 5TH FLOOR BROOKLYN, NY 11201	NONE	501(C)(3)	GENERAL	1,000
INTI FOUNDATION 280 LAS BRISAS COURT CORAL GABLES, FL 33143	NONE	501(C)(3)	GENERAL	400
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FUEL FOR TRUTH633 3RD AVE NEW YORK, NY 10017	NONE	501(C)(3)	GENERAL	18
LARGER THAN LIFE5415 35TH STREET LONG ISLAND CITY, NY 11101	NONE	501(C)(3)	GENERAL	103
JICNY JEWISH INTERNATIONAL CONNECTION NY 382 CENTRAL PARK WEST 4A NEW YORK, NY 10025	NONE	501(C)(3)	GENERAL	360
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LOCUSTS PROJECTS 3852 NORTH MIAMI AVENUE MIAMI, FL 33127	NONE	501(C)(3)	GENERAL	2,500
LONG ISLAND HOUSING SERVICES 640 JOHNSON AVE SUITE 8 BOHEMIA, NY 11716	NONE	501(C)(3)	GENERAL	25,000
MAGBIT FOUNDATION 433 N CAMDEN DR 4TH FLOOR SUITE 102 BEVERLY HILLS, CA 90210	NONE	501(C)(3)	GENERAL	1,250
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MOVEMBERPO BOX 1595 CULVER CITY, CA 90210	NONE	501(C)(3)	GENERAL	37
NETBACH YAKOV7047 136TH ST FLUSHING, NY 11367	NONE	501(C)(3)	GENERAL	500
OHRAHA TORAH 1805 SWARTHMORE AVE LAKEWOOD, NJ 08701	NONE	501(C)(3)	GENERAL	36
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PAYPAL GIVES1250 I ST NW 1202 WASHINGTON, DC 20005	NONE	501(C)(3)	GENERAL	586
PROJECT ALS801 RIVERSIDE DR 6G NEW YORK, NY 10032	NONE	501(C)(3)	GENERAL	500
PROJECT NIGHT148 BEULAH STREET SAN FRANCISCO, CA 94117	NONE	501(C)(3)	GENERAL	36
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
RAJE2915 OCEAN PKWY BROOKLYN, NY 11235	NONE	501(C)(3)	GENERAL	18
STAND UP TO CANCERPO BOX 843721 LOS ANGELES, CA 90084	NONE	501(C)(3)	GENERAL	18
STAND WITH USPO BOX 341069 LOS ANGELES, CA 90034	NONE	501(C)(3)	GENERAL	36
Total ► 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TARGET- MAKE A WISH 1384 PERRINEVILLE RD MONROE TOWNSHIP, NJ 08831	NONE	501(C)(3)	GENERAL	1,044
THE BROWNSTONE EXPERIENCE FDN 224 E 12TH ST NEW YORK, NY 10003	NONE	501(C)(3)	GENERAL	384
THE CHESED FUND7045 N RIDGEWAY LINCOLNWOOD, IL 60712	NONE	501(C)(3)	GENERAL	2
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE GUBBIO PROJECT 133 GOLDEN GATE AVE SAN FRANCISCO, CA 94102	NONE	501(C)(3)	GENERAL	18
THE HIGH HOLIDAYS419 E 77TH ST NEW YORK, NY 10075	NONE	501(C)(3)	GENERAL	56
THE RESOLUTION PROJECT 420 LEXINGTON AVE 1626 NEW YORK, NY 10170	NONE	501(C)(3)	GENERAL	20
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE WHITNEY MUSEUM 99 GANSEVOORT ST NEW YORK, NY 10014	NONE	501(C)(3)	GENERAL	500
TICKETMASTER C/O R PENZER 81 HARBORVIEW WEST LAWRENCE, NY 11559	NONE	501(C)(3)	GENERAL	1,137
TIKVAH AMERICA 165 E 56TH ST 4TH FLOOR NEW YORK, NY 10022	NONE	501(C)(3)	GENERAL	216
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TIKVAH CHILDRENS HOME 8 HENDERSON DR WEST CALDWELL, NJ 07006	NONE	501(C)(3)	GENERAL	432
TIXNYT EVENT C/O R PENZER 81 HARBORVIEW WEST LAWRENCE, NY 11559	NONE	501(C)(3)	GENERAL	23
TOMCHEI SHABBOS 129-01 METROPOLITAN AVE KEW GARDENS, NY 11415	NONE	501(C)(3)	GENERAL	1,000
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
VARIOUS CHARITIES C/O R PENZER 81 HARBORVIEW WEST LAWRENCE, NY 11559	NONE	501(C)(3)	GENERAL	2,851
WIKIPEDIA 120 KEARNY STREET 16TH FLOOR LOS ANGELES, CA 94104	NONE	501(C)(3)	GENERAL	18
YAD L'CHAIM-PEYLIM4018 18TH AVE BROOKLYN, NY 11218	NONE	501(C)(3)	GENERAL	5
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
YESHIVA GEDOLA AND MESIVTA 42 NOE STREET CARTERET, NJ 07008	NONE	501(C)(3)	GENERAL	20,000
YESHIVA MIR1791 OCEAN PKWY BROOKLYN, NY 11223	NONE	501(C)(3)	GENERAL	2,000
YMWREAPO BOX 4380 NEW YORK, NY 10163	NONE	501(C)(3)	GENERAL	310
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
YOUNG ISRAEL OF CEDARHURST 8 SPRUCE STREET CEDARHURST, NY 11516	NONE	501(C)(3)	GENERAL	1,000
ZICHRON YACOV 12 WALLENBERG CIRCLE MONSEY, NJ 10952	NONE	501(C)(3)	GENERAL	5,000
ZOA CAMPUS 633 THIRD AVENUE SUITE 31-B NEW YORK, NY 10017	NONE	501(C)(3)	GENERAL	24
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ZOO MIAMI FOUNDATION 12400 SW 152ND ST MIAMI, FL 33177	NONE	501(C)(3)	GENERAL	5,981
AMERICA-ISRAEL CULTURAL FOUNDATION 322 8TH AVENUE SUITE 1702 NEW YORK, NY 10001	NONE	501(C)(3)	GENERAL	180
CENTER FOR EDUCATIONAL 28 W 44TH ST 801 NEW YORK, NY 10036	NONE	501(C)(3)	GENERAL	180
Total ▶ 3a				560,078

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i>				
DEEP SOUTH CANINPO BOX 826 ELLAVILLE, GA 31806	NONE	501(C)(3)	GENERAL	5
Total ▶ 3a				560,078

TY 2019 Accounting Fees Schedule**Name:** JACOB & ANITA PENZER FOUNDATION**EIN:** 65-0710609

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
COOPERSMITH, SIMON & VOGEL, PC	9,590	480		9,110
MEYER M LIEBER, CPA	950	0		950
AMANDA BLUM, CPA	39,600	1,980		37,620

TY 2019 All Other Program Related Investments Schedule

Name: JACOB & ANITA PENZER FOUNDATION
EIN: 65-0710609

Category	Amount
N/A	0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2019 Depreciation Schedule

Name: JACOB & ANITA PENZER FOUNDATION

EIN: 65-0710609

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
FURNITURE & FIXTURES	2017-09-01	6,511	1,262	200DB	7.00000000000000	569	0		
COMPUTER EQUIPMENT	2017-10-01	3,995		200DB	5.00000000000000	0	0		

TY 2019 Investments Government Obligations Schedule**Name:** JACOB & ANITA PENZER FOUNDATION**EIN:** 65-0710609**US Government Securities - End
of Year Book Value:**

6,228,162

**US Government Securities - End
of Year Fair Market Value:**

6,228,162

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2019 Investments - Other Schedule

Name: JACOB & ANITA PENZER FOUNDATION

EIN: 65-0710609

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ASCOT PROPERTIES	AT COST	70,918	70,918
OTHER INVESTMENTS	AT COST	2,601,201	2,601,201

**TY 2019 Land, Etc.
Schedule****Name:** JACOB & ANITA PENZER FOUNDATION**EIN:** 65-0710609

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
FURNITURE & FIXTURES	6,511	5,087	1,424	
COMPUTER EQUIPMENT	3,995	3,995	0	

TY 2019 Legal Fees Schedule**Name:** JACOB & ANITA PENZER FOUNDATION**EIN:** 65-0710609

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ELIE HECHT	107,500	43,000		64,500
COZEN O'CONNOR LLC	13,808	0		13,808
GERALD P. GROSS PC	8,500	0		8,500
DAMAN & ASSOCIATES	49,746	0		49,746

TY 2019 Other Expenses Schedule**Name:** JACOB & ANITA PENZER FOUNDATION**EIN:** 65-0710609**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CORPORATE AGENT FEES	472	0		472
BANK FEES	257	0		257
DUES & SUBSCRIPTIONS	1,386	0		1,386
MEALS & ENTERTAINMENT	12,098	0		12,098
OFFICE SUPPLIES	1,816	0		1,816
MISCELLANEOUS EXPENSE	213	0		213
PROFESSIONAL DEVELOPMENT	3,378	0		3,378
STATE FRANCHISE FEE	297	0		297
COMPUTER & INTERNET	195	0		195
TELEPHONE	54	0		54

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER DEDUCTIONS-PASSTHROUGH ENTITY	18,422	18,422		0
BAD DEBT EXPENSE	65,000	0		65,000
ADVERTISING & MARKETING	1,806	0		1,806
PROFESSIONAL NETWORKING	12,398	0		12,398

TY 2019 Other Liabilities Schedule**Name:** JACOB & ANITA PENZER FOUNDATION**EIN:** 65-0710609

Description	Beginning of Year - Book Value	End of Year - Book Value
DUE TO ASCOT	123,328	123,328

TY 2019 Taxes Schedule**Name:** JACOB & ANITA PENZER FOUNDATION**EIN:** 65-0710609

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	10,000	0		0