Return of Private Foundation

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

OMB No 1545-0047

Department of the Treasury

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

_		GO to www.iis.gov/FormagoPF1	or instruction	s and	trie late:	st iniormati	оп. Орен	to ruone mspection
F	or caler	ndar year 2019 or tax year beginning		, 201	9, and (ending		, 20
N	ame of fou	undation				A Employe	er identification numb	er
_K0	OWITZ F	AMILY FOUNDATION '				75-27075	61	
		street (or P O box number if mail is not delivered to street address)		Roor	n/suite		ne number (see instruct	ions)
52	215 N.	O'CONNOR BLVD		485		214 720	1488	
		n, state or province, country, and ZIP or foreign postal code		1405			tion application is pend	ing check hore >
тя	RVING	TX 75039				O il exemp	tion application is pend	ing, check here
_			n of a former	nublic	charity	D 4 Foroio	n organizations, check	hore ►
Ū	000.	☐ Final return ☐ Amended		paone	Citainty	D 1. Follely	ii organizations, check	here ►
					,		n organizations meeting here and attach complete.	
<u> </u>	Check	k type of organization 🔯 Section 501(c)(3) exempt p		ation	nil		foundation status was	
, ;		on 4947(a)(1) nonexempt charitable trust Other tax			1900		07(b)(1)(A), check here	►
		narket value of all assets at J Accounting method						
-		if year (from Part II, col (c), Other (specify)	<u> </u>	ш <i>^</i> ·	Joorda.	F If the fou	ndation is in a 60-mont ction 507(b)(1)(B), chec	h termination k here ► □
		5) ► \$ 1,349,321.67 (Part I, column (d), must b	e on cash bas	ıs)				
	Part I				Τ			(d) Disbursements
		amounts in columns (b), (c), and (d) may not necessarily equal	(a) Revenue expenses (investment	(c) Adjusted net	for charitable
		the amounts in column (a) (see instructions))	books		'''	come	income	purposes (cash basis only)
_	1	Contributions, gifts, grants, etc., received (attach schedule)	136,41	4 54	 	- ,	1 72 41	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
	2	Check ► ☐ if the foundation is not required to attach Sch B	130,41	, 54	 		4 461 74	19
	3	Interest on savings and temporary cash investments	1.0	2.15	 	142 15	· · · · · · · · · · · · · · · · · · ·	
	4	Dividends and interest from securities		2.13		132 13		12 (29)
	5a	Gross rents						
	b	Net rental income or (loss)	· · · · ·		·	, 'r	14 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	**
a		Net gain or (loss) from sale of assets not on line 10	·		\$4		The second second	129h , 13 g- "
·	ь	Gross sales price for all assets on line 6a	,			प्रक्रमा २ <u>१</u> च् ।	19.7 25.2	
Revenue	7	Capital gain net income (from Part IV, line 2)				0 00		
ď	8	Net short-term capital gain	, -		ļ	, 0 00		. 12 Oct. 15
	9	Income modifications			<u> </u>			# # # 1 x 1
	10a	Gross sales less returns and allowances				· 	-	
	ь	Less Cost of goods sold			,		والإملاقين الوالد المالية	
	C	Gross profit or (loss) (attach schedule)		0.00	· .	-	. <u></u>	3, 4
,	11	Other income (attach schedule)		0.00				11 11 41 41 4 1
	12	Total. Add lines 1 through 11	136,55	6.69		142.15	0.00	分配本元。 [1
_	. 13	Compensation of officers, directors trustees etc						
Sesued	14	Other employee salaries and weges	18					
, u	15	Pension plans, employee beneats AUG 0 7 2020	ŏ					
Š	16a	Legal fees (attach schedule)	8					
Ú	j b		-	0 25		2,590.25		
٤	. c	Accounting fees (attach schedule) OGDEN, UT Other professional fees (attach schedule)						•
Ŕ	17	Interest						
O.Y	18	Taxes (attach schedule) (see instructions)	3,00	0 00		3,000 00		
~ {E	19	Taxes (attach schedule) (see instructions) 2018 and 2019 Foundation Excise Tax Depreciation (attach schedule) and depletion						. L to 1
≥=	20	Occupancy						
≥₹	21	Travel, conferences, and meetings						
בַּ	22	Printing and publications						
罗 5	23	Other expenses (attach schedule)						
E =	24	Total operating and administrative expenses.						
Octavioral NOV 1 Strating and Administration Ex	[Add lines 13 through 23	5,59	0 25		5,590.25	0.00	0 00
֓֞֞֞֓֓֓֓֓֟֓֓֓֓֟	25	Contributions, gifts, grants paid	141,53			• • _	a a sime	141,531.36
- 0	26	Total expenses and disbursements. Add lines 24 and 25	147,12			5,590.25	0.00	141,531.36
	27	Subtract line 26 from line 12				5		177 127 7
	а	Excess of revenue over expenses and disbursements	(10,50	4 92].	<u> </u>	of the second	Market by the
	b	Net investment income (if negative, enter -0-)				0.00	de la company	1997
	١ ۵	Adjusted net income (if negative, enter -0-)			-	•	0.00	71. 1

For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2019)

1 Cash — non-interest-bearing 1, 655.00 17, 675.18 3, 733.76 3, 2	Pa	art II	Balance Sheets Attached schedules and amounts in the description column	Beginning of year	Er	d of year
25 Savings and temporary cash investments 3 Accounts receivable ▶ 1 Piedges receivable ▶ 2 Less allowance for doubtful accounts ▶ 4 Piedges receivable ▶ 2 Savings and temporary cash investments 5 Grants receivable 5 Grants receivable 6 Receivable Savings and temporary cash investments 7 Other notes and loans receivable (attach schedule) 1 Less allowance for doubtful accounts ▶ 8 Inventiones for sale or use 9 Prepaid expenses and deferred charges 10 Investments—Us and sale government obbigations (attach schedule) 1 Investments—Corporate bonds (attach schedule) 2 Investments—corporate bonds (attach schedule) 1 Investments—Corporate bonds (attach schedule) 2 Investments—corporate bonds 2 Investments—cor		1	should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
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	_ <u>-</u>	iotal	The casses of fulld balances at end of year fille 4 fillings line 3)—	are ii, coluitiii (b), iii	10 20 10	

Part '	(a) List and describe the kind	Losses for Tax on Investment d(s) of property sold (for example, real estate, e, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation		e acquired day, yr)	(d) Date sold (mo , day, yr)
1a							
<u>b</u>							
<u>c</u>							
<u>d</u>	.						
е_	(e) Gross sales price	(f) Depreciation allowed (or allowable)		other basis nse of sale			n or (loss) f) minus (g))
а					_		
b					_		
С							
d							
ее	Complete only for assets show	l ving gain in column (h) and owned by the	foundation	on 12/31/69			(4)
	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Exces	s of col (i) (j), if any		(I) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
a			 -				
b							
С							
d							
е		() ()		4117			
2	Capital gain net income or	(net capital loss) { If gain, also If (loss), enter			2		
3		or (loss) as defined in sections 122; , line 8, column (c) See instruction			3		
Part		er Section 4940(e) for Reduced	Tax on N	et Investment			··
		ate foundations subject to the section					
Was t	s," the foundation doesn't qu	section 4942 tax on the distributable ualify under section 4940(e) Do not	complete tl	nis part			☐ Yes ☒ No
1		unt in each column for each year, se	e the instru	ictions before ma	akıng an	y entries	- (4)
Cale	(a) Base period years endar year (or tax year beginning in)	(b) Adjusted qualifying distributions	Net value of	(c) noncharitable-use as	ssets		(d) ribution ratio divided by col (c))
	2018	144,500 00		1,766,79			0.0818
	2017	539,707 36		1,825,96			0.2956
	2016 2015	251,162.88		1,622,81			0.1548 0.1840
	2013	320, 391.05 345, 650.88		1,741,14 1,740,24			0.1986
.	2014	343,030.00		1,740,24	7.13		0.1300
2	Total of line 1, column (d)				2	2	0 9148
3		or the 5-year base period—divide tundation has been in existence if les				3	.18296
4	Enter the net value of nonc	haritable-use assets for 2019 from F	Part X, line	5	4	1	1,279,868 02
5	Multiply line 4 by line 3					5	234,164.65
6	Enter 1% of net investmen	t income (1% of Part I, line 27b)			_ 6	<u>; </u>	
7	Add lines 5 and 6				7	<u>, </u>	234,164 65
8	Enter qualifying distribution		1/1 lma 1h	and complete t	B_l	1	141,531 36
		er than line 7, check the box in Part	VI, line 1b	, and complete t	hat part	using a 1	% tax rate See

Part	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—s	see i	instructi	ons)
1a'	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1	4 3	KA Z	
	Date of ruling or determination letter (attach copy of letter if necessary—see instructions)			1.74
b	\	1		0.00
	here ► ☐ and enter 1% of Part I, line 27b			To all
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations, enter 4% of Part I, line 12, col (b)		The state of the s	1 1 1
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	2		
3	Add lines 1 and 2	3		0.00
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5		0.00
6	Credits/Payments ?:	23 3 Y		
а	2019 estimated tax payments and 2018 overpayment credited to 2019 6a 1,680 70			***
b	Exempt foreign organizations—tax withheld at source 6b 6b			1.50
С	Tax paid with application for extension of time to file (Form 8868)		المراجعة ا المراجعة المراجعة ال	£ 12.
d	Backup withholding erroneously withheld 6d 5.	, - \(\frac{1}{2} \)		75
7	Total credits and payments Add lines 6a through 6d	7	1,	680.70
8	Enter any penalty for underpayment of estimated tax. Check here 🗌 if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		0.00
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,	680 70
11		11 <u> </u>		0.00
Part	VII-A Statements Regarding Activities		1	
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did	d it	Yes	s No
	participate or intervene in any political campaign?		1 <u>a</u>	x
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See t instructions for the definition	the	1b	
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any material	ade	1 2 2 1 1 2 2	X 3 + 4 - 1
	published or distributed by the foundation in connection with the activities	iais		
С	Did the foundation file Form 1120-POL for this year?	1	1c	لنتناء
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year		2012	1 2 25.4
ű		one	14.4	
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposes			
Ŭ	on foundation managers ► \$ None	-		취수
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2	X
_	If "Yes," attach a detailed description of the activities		在基础板	a e in
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, article	cles		6 - 44. 2 - 44.
	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3	X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a	X
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?		5	X
•	If "Yes," attach the statement required by General Instruction T		1	
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			وريج ويسالو
	By language in the governing instrument, or		[新報]	
	 By state legislation that effectively amends the governing instrument so that no mandatory directions the conflict with the state law remain in the governing instrument? 		6 x	المكتبة لا
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	t XV	7 x	<u> </u>
8a	Enter the states to which the foundation reports or with which it is registered. See instructions.	,	1 mg 1 mg 1 g	
	Texas			1 21
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney Gene	eral	أكفت اعتدسه	-
	(or designate) of each state as required by General Instruction G? If "No," attach explanation	ļ	8b x	1
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3)) or	#13 E	أغنا
	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		9_	x
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing the	neir	10	

Yes No Part VILA Statements Regarding Activities (continued) Yes No Yes Yes No Yes Yes No Yes Yes Yes No Yes	Do	VIII A Chalamanta Danaudina Anticitiva (anticipi			age C
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 12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privilegies? If "Yes," attach statement. See instructions 12 Did the foundation comely with the public inspection requirements for its annual returns and exemption application? 13 Velosities address. ► 14 The books are in care of ► № 1, 5. Samistion. 15 Section 4947(a)(1) once-more, Blvd. 1, 59184, 495. 16 Section 4947(a)(1) once-more pit charts filing Form 990-PF in lieu of Form 1041—check here and enter the amount of tax-exempt interest received or accrued during the year. 16 At any time during calendary ear 2019, 40 dithe foundation have an interest in or a signature or other authority. 17 See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country. 18 Statements Regarding Activities for Which Form 4720 May Be Required. 19 File Form 4720 flay item is checked in the "Yes" column, unless an exception applies. 19 During the year, did the foundation (either directly or indirectly). 10 Engage in the sale or exchange, or leasing of property with a disqualified person? 11 During the year, did the foundation (either directly or indirectly). 12 Engage in the sale or exchange, or leasing of property with a disqualified person? 13 During the year, did the foundation (either directly or indirectly). 14 Engage in the sale or exchange, or leasing of property with a disqualified person? 15 During the year, did the foundation (either directly or indirectly). 16 Engage in the sale or exchange, or leasing of property with a disqualified person? 17 Engage in the sale or exchange, or leasing of property with a disqualified person? 18 During the year, did the foundation of a sisqualified person or least terms and the property of th	Pair	VII-A Statements Regarding Activities (continued)	1		T N =
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6d and 6e) for tax year(s) beginning before 2019? 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) 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its had been appeared 20102.			Ì		
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Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold interest holdings in 2019 as a result of (1) any purchase enterprise at any time during the year? Did the foundation hold interest holdings in 2019 as a result of (1) any purchase by the foundation or displayed by the foundation or displayed by the foundation or displayed by the foundation any business enterprise at any time during the year? Did the foundation hold interest holdings in 2019 as a result of	С				
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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purposes?					
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, 1060, (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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its	3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise			
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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its		at any time during the year?			
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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its	b				
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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purposes that bed as the second of the tay year to be presented in 2019?					
foundation had excess business holdings in 2019) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purposes?					
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			3h		
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its	4 a	· · · · · · · · · · · · · · · · · · ·	-		х
should be a versus that had not been removed from reported before the first day of the tay year beginning in 20102					
			4b		х

Par	Statements Regarding Activities	s tor v	Vhich Form	4720	May Be R	Require	ed (conti	nued)			
5a	During the year, did the foundation pay or incur	any am	ount to							Yes	No
	(1) Carry on propaganda, or otherwise attempt t						🗌 Yes	X No	· [· , ',	
	(2) Influence the outcome of any specific public		ion (see sect	ion 495	55), or to ca	arry on,			,	r	
	directly or indirectly, any voter registration di						☐ Yes	X No			ļ
	(3) Provide a grant to an individual for travel, stu						Yes	X No) [12 1	. }
	(4) Provide a grant to an organization other than	n a cha	iritable, etc.,	organız	ation desc	ribed in			t	· ^	\ \ \
	section 4945(d)(4)(A)? See instructions						🗌 Yes	X No		· · .	44
	(5) Provide for any purpose other than religious				ary, or educ	cational			-3-		•
	purposes, or for the prevention of cruelty to						☐Yes	X No		, ,	t
b	If any answer is "Yes" to 5a(1)–(5), did any of the in Regulations section 53 4945 or in a current no							scribed	 5b		. 1
	Organizations relying on a current notice regardi							▶ [_] [. 1
С	If the answer is "Yes" to question 5a(4), does t			n exem	ption from	the tax			1.		. !
	because it maintained expenditure responsibility	for the	e grant?				🗌 Yes	□No	, t	ا: ر	۱ -
	If "Yes," attach the statement required by Regula								- "		·
6a	Did the foundation, during the year, receive any	tunds,	directly or in	directly	, to pay pre	emiums					,
	on a personal benefit contract?						Yes	X No			ا ه
b	Did the foundation, during the year, pay premiun	ns, dire	ectly or indire	ctly, on	a personal	benefit	contract	?	6b		_x_
	If "Yes" to 6b, file Form 8870										ı
7a	At any time during the tax year, was the foundation	a party	y to a prohibit	ed tax s	shelter trans	action?	🗌 Yes	X No			
b	If "Yes," did the foundation receive any proceed							า?	7b		
8	Is the foundation subject to the section 4960 ta			more t	han \$1,000	,000 in			+		
	remuneration or excess parachute payment(s) de						🔲 Yes	X No		3 5	- 1
Pari	VIII Information About Officers, Direc	tors,	Trustees, F	ounda	tion Mana	agers,	Highly F	Paid E	mploy	ees,	
	and Contractors	_	_								
1	List all officers, directors, trustees, and found	lation	managers ar	d their	compens	ation. S	ee instru	uctions			
	(a) Name and address	hou	e, and average irs per week ed to position) (If r	mpensation not paid, iter -0-)	emplo	Contribution: yee benefit erred compe	plans	(e) Expe other a	nse acc allowan	
avıd	Kowitz	Presi	dent/Treasu	rer/Tr	ustee						
4 Wo	od Rd., Bedford Hills, NY 10507	1 hr	/month		-0-			-0-			-0 -
arah	Kowitz	Vice	President/S	ecreta	ry/Truste	e					
4 Wo	od Rd , Bedford Hills, NY 10507	1 hr.	/month		-0-			-0-			-0 -
ulie	Miller	Trust	ee								
25 P	ark Avenue, NY, NY	None			-0-			-0-			-0-
2	Compensation of five highest-paid employee "NONE."	es (oth	er than thos	se incl	uded on li	ne 1—s	see instr	uction	s). If no	one, e	enter
	(a) Name and address of each employee paid more than \$50,00	0	(b) Title, and a hours per v devoted to pe	/eek ¯	(c) Comper	isation	(d) Contribution employee plans and do compens	benefit leferred	(e) Exper other a	nse acc illowand	
											<u>None</u>
•											Mana
									_ _	···	None
				_							None
											None
							············				None
						ł					None
otal	number of other employees paid over \$50,000							•	00		None
									orm 99	リーピト	(2019)

Part	VIII Information About Officers, Directors, Trustees, Foundated and Contractors (continued)	ion Managers, Highly Paid En	nployees,
3	Five highest-paid independent contractors for professional services. See	instructions. If none, enter "NON	E."
	(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
			None
			None
			None
			None
	CEO 000 (see and see a	<u></u>	None
	number of others receiving over \$50,000 for professional services IX-A Summary of Direct Charitable Activities		None
			<u> </u>
	the foundation's four largest direct charitable activities during the tax year. Include relevant stanizations and other beneficiaries served, conferences convened, research papers produced, etc.	atistical information such as the number of	Expenses
1			
_			
_			None
2 _			
-			
-			None
3 .			
-			
			None
4 -			
-			
Dod	IX B. C		None
	IX-B Summary of Program-Related Investments (see instruct cribe the two largest program-related investments made by the foundation during the tax year on		Amount
	chibe the two largest program-related investments made by the footidation during the tax year of	mies i and z	Autount
1 -			
-			None
2 -			None
٠ -			
-			None
All o	ther program-related investments. See instructions		None
3			
• -			
-			None
Total.	Add lines 1 through 3	>	0.00
			Form 990-PF (2019)

Part	see instructions)	ign tou	ndations,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
•	purposes		
а	Average monthly fair market value of securities	1a	805,499.79
b	Average of monthly cash balances	1b	34,719.00
С	Fair market value of all other assets (see instructions)	1c	459,139.61
d	Total (add lines 1a, b, and c)	1d	1,299,358 40
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	1,299,358.40
4	Cash deemed held for charitable activities Enter 11/2% of line 3 (for greater amount, see		
	instructions)	4	19,490 38
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,279,868.02
6	Minimum investment return Enter 5% of line 5	6	63,993.40
Part		oundat	ions
	and certain foreign organizations, check here ▶ □ and do not complete this part)	1 . 1	
1	Minimum investment return from Part X, line 6	1	63,993.40
2a	Tax on investment income for 2019 from Part VI, line 5	↓. ↓	
b	Income tax for 2019 (This does not include the tax from Part VI)	1- 1	
С	Add lines 2a and 2b	2c	0.00
3	Distributable amount before adjustments Subtract line 2c from line 1	3	63,993.40
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	63,993 40
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII,		
	line 1	7	63,993 40
	XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	141,531.36
b	Program-related investments—total from Part IX-B	1b	
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	<u></u>	
а	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	141,531.36
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	141,531.36
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating qualifies for the section 4940(e) reduction of tax in those years	g wheth	er the foundation

Part XIII

art ²	XIII Undistributed Incom	me (see instruction	ons)			
	•		(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1	Distributable amount for 20° line 7	19 from Part XI,				63,993.40
2	Undistributed income, if any, as o	of the end of 2019	ţ			
а	Enter amount for 2018 only		·			
b	Total for prior years 20,					,
3	Excess distributions carryover	1				
a	From 2014	256,676 30				
b c	From 2015 From 2016	233,582 30			•	
d	From 2017	170,022.12 450,970 85				•
e	From 2018	58,779.47), .
f	Total of lines 3a through e	307113111	1,1/0,031 04	•		
4	Qualifying distributions for 20	19 from Part XII,				
	line 4 ▶ \$141,531.3	<u>6</u>				•
а	Applied to 2018, but not more					
b	Applied to undistributed incor (Election required—see instruc	, ,				
С	Treated as distributions out of required—see instructions)	corpus (Election			,	*
d	Applied to 2019 distributable a	amount				63,993 40
е	Remaining amount distributed	out of corpus	77,537 96		,	w
5	Excess distributions carryover (If an amount appears in column amount must be shown amount must be sho	mn (d), the same				
6	Enter the net total of ea indicated below:	ich column as				
а	Corpus Add lines 3f, 4c, and 4	e Subtract line 5	1, 247, 569 00			· · · · · · · · · · · · · · · · · · ·
b	Prior years' undistributed in line 4b from line 2b	ncome Subtract ^v		0.00	•	
С	Enter the amount of prior year income for which a notice of been issued, or on which the tax has been previously assess	of deficiency has e section 4942(a)				
d	Subtract line 6c from lin amount—see instructions	e 6b Taxable		0.00		
е	Undistributed income for 2014a from line 2a Taxable instructions				0.00	
f	Undistributed income for 201	9 Subtract lines			•	
	4d and 5 from line 1 This a	amount must be				
	distributed in 2020	ļ	<u>.</u> .			0.00
7	Amounts treated as distribution to satisfy requirements important and the satisfy requirements important and the satisfy required—see instructions).	sed by section				· ·
8	Excess distributions carryove applied on line 5 or line 7 (see		256,6/6.30			
9	Excess distributions carry Subtract lines 7 and 8 from lin	over to 2020.	220,070.30			, , , , , , , , , , , , , , , , , , , ,
0	Analysis of line 9:		200,000 000			1+
а	Excess from 2015	233,582 30	ŀ			٠,
b	Excess from 2016	170,022.12				
C	Excess from 2017	<u>450</u> ,970 85		. ,		1
d	Excess from 2018	58,779 47	ł	}		
e	Excess from 2019	77,537 96				Form 990-PF (2019)
						Form 330"F (2019)

Part	XIV Private Operating Founda	itions (see instru	ictions and Part \	VII-A, question 9)	
_1a	If the foundation has received a ruling foundation, and the ruling is effective fo			private operating	Not Applicable	
b	Check box to indicate whether the four	ndation is a private	operating foundati	ion described in se	ction 4942(j)(3) or 🗌 4942(j)(5)
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		
	income from Part I or the minimum investment return from Part X for	(a) 2019	(b) 2018	(c) 2017	(d) 2016	(e) Total
	each year listed		<u> </u>			0.00
b	85% of line 2a	0 00		0.00	0.00	0.00
	Qualifying distributions from Part XII,	0 00	0.00	0.00	0.00	0.00
C	line 4, for each year listed					0.00
d	Amounts included in line 2c not used directly for active conduct of exempt activities					0.00
е	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	0 00	0.00	0 00	0.00	0 00
3	Complete 3a, b, or c for the alternative test relied upon		0.00	000	0.00	
а	"Assets" alternative test—enter (1) Value of all assets					0.00
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0.00
b	"Endowment" alternative test—enter ² / ₃ of minimum investment return shown in Part X, line 6, for each year listed					
С	"Support" alternative test—enter				\	0.00
v	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities toans (section 512(a)(5)), or royalties)					0.00
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0.00
	(3) Largest amount of support from an exempt organization					0.00
_	(4) Gross investment income				_	0.00
Part	XV Supplementary Information	on (Complete th	is part only if th	e foundation ha	ad \$5,000 or mo	re in assets at
	any time during the year—	-see instruction	ıs.)			
1	Information Regarding Foundation					
	List any managers of the foundation vibefore the close of any tax year (but o	who have contribu				by the foundation
David	and Sarah Kowitz					
b	List any managers of the foundation ownership of a partnership or other er					ge portion of the
	Information Regarding Contribution Check here ▶ ☒ if the foundation unsolicited requests for funds. If the fo complete items 2a, b, c, and d. See in The name, address, and telephone nu	only makes controundation makes (estructions	ibutions to presele gifts, grants, etc , t	ected charitable of oindividuals or or	ganızatıons under	other conditions,
b	The form in which applications should	De Submitted and	iniormation and n	naterials they shot	uia include	·
C	Any submission deadlines					
d	Any restrictions or limitations on aw factors	vards, such as by	geographical are	eas, charitable fie	lds, kinds of inst	tutions, or other

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	show	any	is an individual, relationship to	Foundation status of	Purpose of grant or	Amount
Name and address (home or business)			ation manager htial contributor	recipient	contribution	, ,,,,,
a Paid dunng the year				,		
The UCLA Foundation						
0889 Wilshire Blvd. 12th Floor				j		
os Angeles, CA 90024	Not	an	Individual	Public	Cannabis Research Initiative	50,000 0
Memorial Sloan Kettering Cancer Center						
275 York Avenue						1 000 0
Jew York, NY 10065	NOT	an	Individual	Public	General Operating	1,000.0
hiladelphia Museum of Art	ĺ					
2600 Benjamin Franklin Pkwy				_ , ,		E0 000 0
hiladelphia, PA 19130	NOT	an	Individual	Public	General Operating	50,000.0
merican Friends of the National Gallery Lond	lon					
1 West 34th Street, 7th Floor #7010	<u>. </u>					25 000 0
ew York, NY 10001	Not	an	Individual	Public	General Operating	25,000.0
rown University						
Providence, RI 02912	Not	an	Individual	Public	General Operating	7,431 3
astings Music Festival						
hite Rock Theatre						
astings, UK TN34 lJX	Not	an	Individual	Public	General Operating	5,150.0
atonah-Bedford Hills Volunteer Ambulance Cor	ps					
60 Bedford Rd,						
Katonah, NY 10536	Not	an	Individual	Public	General Operating	200.0
Big Brothers Big Sisters of NYC						
10 Rector Street						
New York, NY 10006	Not	an	Individual	Public	General Operating	2,500.0
Bedford Garden Club				:		1
P O. Box 812						
Bedford Hills, NY 10507 Total	Not	an	Individual	Public	General Operating ▶ 3a	250.0 141,531.3
b Approved for future payment					, Ju	141,331.3
			•	:		
	1			1		

Entergr	oss amounts unless otherwise indicated	Unrelated bu	isiness income	Excluded by sect	ion 512, 513, or 514	(e)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exemple function income (See instructions)
	ogram service revenue	_				
a b			 -			<u></u>
C						
d						
e	,					
f				-		_
g	Fees and contracts from government agencies					
2 M	embership dues and assessments					
3 Int	erest on savings and temporary cash investments					
	vidends and interest from securities					142 15
	et rental income or (loss) from real estate					
	Debt-financed property					
	Not debt-financed property				<u></u>	,
	et rental income or (loss) from personal property her investment income			-		
	in or (loss) from sales of assets other than inventory					
	et income or (loss) from special events	<u> </u>				
	oss profit or (loss) from sales of inventory					
	her revenue a					
b					· · <u> </u>	
С						
d						
е						
12 Su	ibtotal Add columns (b), (d), and (e)		0 00		0.00	142.15
	otal. Add line 12, columns (b), (d), and (e)				13	142.15
	rksheet in line 13 instructions to verify calculation	s)				
			4 7 5		***	
	VI-B Relationship of Activities to the A			·		
Part X Line No ▼	Explain below how each activity for which accomplishment of the foundation's exempt pur	income is repo poses (other that	orted in column in by providing fun	(e) of Part XVI ds for such purp		nportantly to the
Line N	Explain below how each activity for which accomplishment of the foundation's exempt pur The Foundation distributes its principal	income is repo poses (other that	orted in column in by providing fun	(e) of Part XVI ds for such purp		nportantly to the
Line N∈	Explain below how each activity for which accomplishment of the foundation's exempt pur	income is repo poses (other that	orted in column in by providing fun	(e) of Part XVI ds for such purp		nportantly to the
Line N∈	Explain below how each activity for which accomplishment of the foundation's exempt pur The Foundation distributes its principal	income is repo poses (other that	orted in column in by providing fun	(e) of Part XVI ds for such purp		nportantly to the tions)
Line N∈	Explain below how each activity for which accomplishment of the foundation's exempt pur The Foundation distributes its principal	income is repo poses (other that	orted in column in by providing fun	(e) of Part XVI ds for such purp		nportantly to the tions)
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Line N∈	Explain below how each activity for which accomplishment of the foundation's exempt pur The Foundation distributes its principal	income is repo poses (other that	orted in column in by providing fun	(e) of Part XVI ds for such purp		nportantly to the
Line N∈	Explain below how each activity for which accomplishment of the foundation's exempt pur The Foundation distributes its principal	income is repo poses (other that	orted in column in by providing fun	(e) of Part XVI ds for such purp		nportantly to the tions)
Line N∈	Explain below how each activity for which accomplishment of the foundation's exempt pur The Foundation distributes its principal	income is repo poses (other that	orted in column in by providing fun	(e) of Part XVI ds for such purp		nportantly to the tions)

Part	XVI			sfers to and Transaction	ns and I	Relationships With Noncha	ritable	е Ехе	mpi
1			rectly or indirectly			ny other organization described tion 527, relating to political		Yes	No
	_	anizations?					1.		
			orting foundation to	a noncharitable exempt org	anızatıor	n of	4 4		
	٠.	Cash					1a(1)	_	Х
		Other assets					1a(2)		_ x
		er transactions					45/41		
			a noncharitable exe	· · ·			1b(1)	-	X
			equipment, or othe	able exempt organization			1b(2) 1b(3)		<u>X</u>
		Reimbursement ari	• •	assets			1b(4)		_x_
		Loans or loan guar	•			•	1b(5)		X
		_		nip or fundraising solicitations			1b(6)		X
				sts, other assets, or paid emp			1c		×
						Column (b) should always show	w the	fair m	
						n If the foundation received less			
	valu	e in any transactio	n or sharing arrang	ement, show in column (d) th	ne value (of the goods, other assets, or se	ervices	recei	ved
(a) Line	no	(b) Amount involved	(c) Name of nonch	naritable exempt organization	(d) Desc	cription of transfers, transactions, and sha	aring arra	angeme	ents
			<u> </u>						
	-+								
								_	
			· .						
	\neg			·					
			-						
			•			nore tax-exempt organizations			
	des	cribed in section 5	01(c) (other than se	ction 501(c)(3)) or in section (527?		□ Ye	s 🗓	No
b	If "Y	es," complete the	following schedule						
		(a) Name of organia	zation	(b) Type of organization	-	(c) Description of relation	nship		
				- -					

	described in section 501(c) (other	than section 501(c)(3)) or in sec	ction 527?		🗌 Yes 🗵 No		
b	If "Yes," complete the following s	chedule					
	(a) Name of organization	(b) Type of organ	ization	(c) Description of relationship			
٠.	Under penalties of penury, I declare that I ha correct, and complete Declaration/of prepare				f my knowledge and belief, it is true,		
Sign Here		مرد اعتاری می اعتاری این استان امال این		Allowicage	May the IRS discuss this return with the preparer shown below? See instructions ∑Yes ☐ No		
	Signature of officer or trustee	Date	Title				
Paid	Print/Type preparer's name	Preparer's signature	Date	Chec	ck X if PTIN		
Prepa	Mary E Edmiston	May I dell	July 3	1 40	employed P01470328		
Use C		miston, Attorney		Firm's EIN	<u> </u>		
030 0		Colinas Blad., Suite 130#	708, Irving, TX 7503	9 Phone no	214 720 1488		
		, ,			Form 990-PF (2019)		

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 Employer identification number KOWITZ FAMILY FOUNDATION 75-2707561 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 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions General Rule For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions Special Rules For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 331/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Don't complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990,

990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its

Form 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

KOWITZ	FAMILY FOUNDATION		-2707561
Part I	Contributors (see instructions) Use duplicate copies of	f Part I if additional space is	needed
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	David N. Kowitz, Trustee 2011 Charitable Le 17 Church Street, 19th Floor New Haven, CT 06510	ad Trust \$25,970.00	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	David N. Kowitz, Trustee 2011 Charitable Le 17 Church Street, 19th Floor New Haven, CT 06510	ad Trust \$294.54	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3	David N. Kowitz 44 Wood Rd. Bedford Hills, NY 10507	\$ 110,150.00	Person
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person

KOWITZ FAMILY FOUNDATION I D 75-2707561

AVERAGE PAIR	AVERAGE FAIR MARKET VALUE OF CAVE	ことのこ							
MORGAN STANLEY730-038517	EY730-038517		CITIGOLD ACC	CITIGOLD ACCOUNT 94427768		CITIINVESTMEN	CITI INVESTMENT ACCOUNT C92-9122218	218	,
	BEGIN	END	BEGIN	END	AVERAGE		BEGIN	END	
JANUARY	17,656	17,636	164,299 03	154,042 81	114,105	JANUARY	69		69
FEBRUARY	17,636	17,637	154,042 81	154,048 72	188,109	FEBRUARY	69	•	66
MARCH	17,637	17,638	154,048 72	154,055 26	13,110	MARCH	69	_	99
APRIL	17,638	17,640	154,055 26	104,061 18	13,111	APRIL	69	•	69
MAY	17,640	17,642	104,061 18	86,545 85	989'5	MAY	69	•	99
JUNE	17,642	17,644	86,545 85	64,748 97	3,599	JUNE	69	•	69
JULY	17,644	17,646	64,748 97	193,615 49	29,900	JULY	69	•	69
AUGUST	17,646	17,648	193,615 49	193,423 71	29,187	AUGUST	69	•	99
SEPTEMBER	17,648	17,650	193,423 71	193,431 66	7,855	SEPTEMBER	69	•	99
OCTOBER	17,650	17,652	193,431 66	164,285 30	3,709	OCTOBER	69	•	99
NOVEMBER	17,652	17,654	164,285 30	164,292 02	3,712	NOVEMBER	69	•	69
DECEMBER ,	17,654	17,656	164,292 02	164,299 03	3,715	DECEMBER	69		66
	TOTAL				415,798		TOTAL	8	26

AVERAGE FAIR MARKET VALUE OF CASH

KOWITZ FAMILY FOUNDATION I.D. 75-2707561

PART X, LINE 1(c) AVERAGE FAIR MARKET VALUE OF OTHER ASSETS -

Bay Capital Feed Fund	330,361 57	326,338 81	318,269 39	317,676 02	330,308 85	327,596 08	317,916 73	339,167 29	298,830 51	278,499 41	313,945 34	321,343 12	330,361 57
Omaha Capital Master China Fund, II	43,737 82	43,737 82	, 43,737 82	43,737 82	43,737 82	67,602 04	150,000 00	150,000 00	150,000 00	150,000 00	150,000 00	150,000 00	150,000 00
Herbl Inc	12/31/2018	1/31/2017	2/28/2017	3/31/2017	4/30/2017	5/31/2017	6/30/2017	7/31/2017	8/31/2017	9/30/2017	10/31/2017	11/30/2017	12/31/2017

372,088 01 366,041 92 361,710 53 367,730 26 384,622 40 431,557 43 553,542 01 543,998 90 513,664 96 521,222 38 542,644 23 550,852 35

Average Monthly Account Balances - Herbl, Inc., Omaha Capital Chine Master Fund, II and Bay Capital Feeder Fund

Total Average Monthly Other Assets

459,139.61

459,139.61