

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

Name of foundation SMART FAMILY FOUNDATION OF NEW YORK		A Employer identification number 81-3395492	
Number and street (or P.O. box number if mail is not delivered to street address) 1333A NORTH AVENUE		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code NEW ROCHELLE, NY 108042120		B Telephone number (see instructions) (914) 632-2762	
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 61,687,307		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities . . .	1,081,972	1,081,972		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	16,383,341			
	b Gross sales price for all assets on line 6a _____ 28,258,024				
	7 Capital gain net income (from Part IV, line 2) . . .		16,383,341		
	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	17,465,313	17,465,313		
	13 Compensation of officers, directors, trustees, etc.	220,000	44,000		176,000
	14 Other employee salaries and wages	13,212	2,642		10,570
	15 Pension plans, employee benefits	14,457	2,891		11,566
	16a Legal fees (attach schedule)	27,875	5,575		22,300
	b Accounting fees (attach schedule)	69,227	13,845		55,382
	c Other professional fees (attach schedule)	228,067	210,467		17,600
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	189,525	9,525		0
	19 Depreciation (attach schedule) and depletion	6,777	0		
	20 Occupancy				
	21 Travel, conferences, and meetings	37,674	7,535		30,139
	22 Printing and publications				
	23 Other expenses (attach schedule)	18,444	10,232		8,212
	24 Total operating and administrative expenses. Add lines 13 through 23	825,258	306,712		331,769
	25 Contributions, gifts, grants paid	2,542,500			2,542,500
	26 Total expenses and disbursements. Add lines 24 and 25	3,367,758	306,712		2,874,269
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	14,097,555			
	b Net investment income (if negative, enter -0-)		17,158,601		
	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	254,265	492,755	492,755
	2 Savings and temporary cash investments	6,017,881	755,829	755,829
	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) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)	0	13,054,459	13,348,785
	b Investments—corporate stock (attach schedule)	28,180,403	34,395,918	47,089,938
	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)			
	14 Land, buildings, and equipment: basis ▶ _____ 20,329 Less: accumulated depreciation (attach schedule) ▶ 20,329	6,777	0	0
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	34,459,326	48,698,961	61,687,307	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)	0	142,080	
	23 Total liabilities (add lines 17 through 22)	0	142,080	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	0	0	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28 Retained earnings, accumulated income, endowment, or other funds	34,459,326	48,556,881	
	29 Total net assets or fund balances (see instructions)	34,459,326	48,556,881	
30 Total liabilities and net assets/fund balances (see instructions) .	34,459,326	48,698,961		

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	34,459,326
2 Enter amount from Part I, line 27a	2	14,097,555
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	48,556,881
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	48,556,881

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 See Additional Data Table			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	16,383,341
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	2,981,654	58,967,382	0.050564
2017	2,934,653	55,333,645	0.053036
2016	30,710	4,275,783	0.007182
2015			
2014			

2 Total of line 1, column (d)	2	0.110782
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	0.036927
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	58,284,372
5 Multiply line 4 by line 3	5	2,152,267
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	171,586
7 Add lines 5 and 6	7	2,323,853
8 Enter qualifying distributions from Part XII, line 4	8	2,874,269

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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	171,586
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	171,586
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	171,586
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	208,729
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	208,729
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	37,143
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax ▶ 37,143 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?		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>		No
c Did the foundation file Form 1120-POL for this year?		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ 0 (2) On foundation managers. ▶ \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		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>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
b If "Yes," has it filed a tax return on Form 990-T for this year?		
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>		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?	Yes	
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>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ IL, NY		
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>	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>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		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>TM BYXBEE COMPANY</u> Telephone no. ► <u>(203) 281-4933</u>			

Located at ► PO BOX 187169 HAMDEN CTZIP+4 ► 06518

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here	<input type="checkbox"/>		
	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.**

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	No
	Organizations relying on a current notice regarding disaster assistance check here. ► <input type="checkbox"/>		
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2019.)	3b	
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)

		Yes	No
5a	During the year did the foundation pay or incur any amount to:		
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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
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).	<input type="checkbox"/> Yes <input type="checkbox"/> No	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.		6b No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?		7b
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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
MARY SMART 1333A NORTH AVENUE 432 NEW ROCHELLE, NY 108042120	CHAIR, SECRETARY AND DIRECT 15.00	100,000	0	0
DAVID STONE 1333A NORTH AVENUE 432 NEW ROCHELLE, NY 108042120	PRESIDENT, TREASURER AND DI 15.00	100,000	0	0
JIM DANATOS 1333A NORTH AVENUE 432 NEW ROCHELLE, NY 108042120	DIRECTOR 5.00	20,000	0	0
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
TM BYXBEE CO 2319 WHITNEY AVENUE HAMDEN, CT 05618	ACCOUNTING	69,227
JP MORGAN 270 PARK AVENUE NEW YORK, NY 10017	INVESTMENT MANAGMENT	56,420
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	
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	
2	
All other program-related investments. See instructions.	
3	
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	58,975,492
b	Average of monthly cash balances.	1b	196,459
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	59,171,951
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	59,171,951
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	887,579
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	58,284,372
6	Minimum investment return. Enter 5% of line 5.	6	2,914,219

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	2,914,219
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	171,586
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	171,586
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	2,742,633
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,742,633
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	2,742,633

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	2,874,269
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	2,874,269
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	171,586
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,702,683

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				2,742,633
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			2,495,075	
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.				
e From 2018.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ <u>2,874,269</u>				
a Applied to 2018, but not more than line 2a			2,495,075	
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.				379,194
e Remaining amount distributed out of corpus	0			
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	0			
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.				2,363,439
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.	0			
10 Analysis of line 9:				
a Excess from 2015.				
b Excess from 2016.				
c Excess from 2017.				
d Excess from 2018.				
e Excess from 2019.				

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	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> See Additional Data Table				
Total			3a	2,542,500
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

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1b(1)	No
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1b(2)		No
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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

<p>Sign Here</p> <p>*****</p> <p>_____</p> <p>Signature of officer or trustee</p>	<p>2020-10-30</p> <p>_____</p> <p>Date</p>	<p>*****</p> <p>_____</p> <p>Title</p>
--	--	--

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ **Yes** ☐ **No**

Paid Preparer Use Only	EDWARD F CLEARY				
	Firm's name ▶ T M BYXBEE COMPANY PC				Firm's EIN ▶ 06-1386456
	Firm's address ▶ P O BOX 187169 HAMDEN, CT 06518				Phone no. (203) 281-4933

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ **Yes** ☐ **No**

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e.g., real estate, (a) 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.)
PUBLICLY TRADED SECURITIES (RUANE, CUNNIFF & GOLDFARB)	P		
PUBLICLY TRADED SECURITIES (RUANE, CUNNIFF & GOLDFARB)	P		
PUBLICLY TRADED SECURITIES (FIRST MANHATTAN)	P		
PUBLICLY TRADED SECURITIES (FIRST MANHATTAN)	P		
PUBLICLY TRADED SECURITIES (ARIEL)	P		
PUBLICLY TRADED SECURITIES (BANK OF AMERICA)	P		
PUBLICLY TRADED SECURITIES (JP MORGANL)	P		
PUBLICLY TRADED SECURITIES (JP MORGAN)	P		
CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
167,812		159,665	8,147
657,630		500,759	156,871
1,778,845		1,756,876	21,969
10,196,983		4,856,554	5,340,429
457,019		296,542	160,477
4,317,162		4,304,287	12,875
620,911			620,911
10,004,722			10,004,722
56,940			56,940

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			8,147
			156,871
			21,969
			5,340,429
			160,477
			12,875
			620,911
			10,004,722
			56,940

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>				
AEOLIAN CHAMBER PLAYERS INC 173 RIVERSIDE DRIVE NEW YORK, NY 100241615	NONE	PC	MUSICAL COMPENSATION AND CONCERT EXPENSES	10,000
ALICE LLOYD COLLEGE 100 PURPOSE ROAD PIPPA PASSES, KY 41844	NONE	PC	GENERAL OPERATIONS	18,000
AMERICAN FRIENDS OF HEBREW UNIVERSITY ONE BATTERY PARK PLAZA 25TH FLOOR NEW YORK, NY 01004	NONE	PC	FILM STUDIES PROGRAM - RAYA MORAG	100,000
Total ▶ 3a				2,542,500

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>				
AMERICAS SOCIETY INC 680 PARK AVENUE NEW YORK, NY 10065	NONE	PC	MUSIC, ART & PHOTOGRAPHY PROJECTS	15,000
AT HOME ON THE SOUND 545 TOMPKINS AVENUE MAMARONECK, NY 10543	NONE	PC	STRATEGIC PLAN	25,000
BETH EL SYNAGOGUE CENTER 1324 NORTH AVENUE NEW ROCHELLE, NY 10804	NONE	PC	COMMUNITY ENGAGEMENT PROGRAM	115,000
Total ▶ 3a				2,542,500

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>				
BRONX ART ENSEMBLE INC 80 VAN COURTLAND SOUTH 7D-2 BRONX, NY 10463	NONE	PC	BUILDING FOR ARTS AND LIVE MUSIC	25,000
CENTER FOR NONPROFIT LEGAL SERVICES 225 WEST MAIN STREET MEDFORD, OR 97501	NONE	PC	REMOVING LEGAL BARRIERS FOR VETERANS	25,000
CENTRAL FUND FOR ISRAEL 461 CENTRAL AVENUE CEDARHURST, NY 11516	NONE	PC	CULTURAL IMMERSION IN ISRAELI SOCIETY	15,000
Total ▶ 3a				2,542,500

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>				
CHERRY LANE ALTERNATIVE LLC 822 8TH AVENUE FLOOR 21 NEW YORK, NY 10001	NONE	PC	PRODUCTION OF FEAR	50,000
CHILDRENS HOPE INDIA INC 7 EDGEMERE DRIVE ALBERTSON, NY 11507	NONE	PC	GENERAL SUPPORT	25,000
CHRISTOPHER NEWPORT UNIVERSITY EDUCATIONAL FOUNDATION INC 1 AVENUE OF THE ARTS NEWPORT NEWS, VA 23606	NONE	PC	OPEN AIR MUSEUM	20,000
Total ▶ 3a				2,542,500

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>				
CITIZENS FOR ALTERNATIVES TO ANIMAL RESEARCH 24 MEADOWAY DOBBS FERRY, NY 10522	NONE	PC	GENERAL SUPPORT	10,000
COLUMBUS HOUSE 586 ELLA T GRASSO BLVD NEW HAVEN, CT 06519	NONE	PC	FOR ABRAHAM'S TENT	25,000
CONNECTICUT HOSPICE INC 100 DOUBLE BEACH ROAD BRANFORD, CT 06405	NONE	PC	ENERGY IMPROVEMENTS	21,000
Total ▶ 3a				2,542,500

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>				
CONNECTICUT PUBLIC BROADCASTING INC 1049 ASYLUM AVE HARTFORD, CT 06105	NONE	PC	GENERAL SUPPORT	100,000
CREATIVE ARTS WORKSHOP INC 80 AUDUBON STREET NEW HAVEN, CT 06510	NONE	PC	INCREASE ACCESS TO VISUAL ARTS INSPECTION FOR YOUNG PEOPLE	20,000
ELI WHITNEY MUSEUM 915 WHITNEY AVENUE HAMDEN, CT 06517	NONE	PC	NEW LASER CUTTER	29,000
Total ▶ 3a				2,542,500

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>				
EMOTIVE FRUITION 233 S 1ST STREET SUITE 3W BROOKLYN, NY 11211	NONE	PC	THERAPEUTIC CREATIVE WRITING SERIES	20,000
FAIRLEIGH DICKINSON UNIVERSITY 285 MADISON AVENUE M-DB0-01 MADISON, NJ 07940	NONE	PC	FAIRLEIGH DICKINSON SCHOOL OF THE ARTS	5,000
FOLKSBEINE YIDDISH THEATRE INC 36 BATTERY PARK SECOND FLOOR NEW YORK, NY 10280	NONE	PC	GLOBAL RESTORATION PROJECTS	25,000
Total ▶ 3a				2,542,500

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>				
FOOTE SCHOOL ASSOCIATION INC 50 LOOMIS PLACE NEW HAVEN, CT 06511	NONE	PC	GENERAL OPERATIONS	40,000
FOUR NATIONSPO BOX 1112 HUDSON, NY 12534	NONE	PC	GENERAL OPERATIONS	25,000
FRACTURED ATLAS INCPO BOX 55 HARTSDALE, NY 10530	NONE	PC	OPERATING AND PRODUCTION COSTS	25,000
Total ▶ 3a				2,542,500

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>				
FRAXA RESEARCH FOUNDATION INC 10 PRINCE PLACE SUITE 203 NEWBURYPORT, MA 01950	NONE	PC	CALLUM CUP	1,000
GREENWICH CORAL SOCIETY INC PO BOX 5 GREENWICH, CT 06830	NONE	PC	CHORAL MUSIC PERFORMANCES	25,000
HEBREW FREE LOAN SOCIETY 675 THIRD AVENUE SUITE 1905 NEW YORK, NY 10017	NONE	PC	LOAN PROGRAM	10,000
Total ▶ 3a				2,542,500

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				
HOPKINS SCHOOL INC 986 FOREST ROAD NEW HAVEN, CT 06515	NONE	PC	GENERAL SUPPORT	25,000
INDIA HERITAGE CENTER INC 49 OLD WOODS ROAD SADDLE RIVER, NJ 07458	NONE	PC	MUSEUM OF INDIA, JOURNAY TO THE U.S.A.	15,000
INTEGRATED REFUGEE & IMMIGRANT SERVICE INC 235 NICOLL STREET 2ND FLOOR NEW HAVEN, CT 06511	NONE	PC	GENERAL SUPPORT	30,000
Total ▶ 3a				2,542,500

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>				
INTERNEWS876 7TH STREET ARCATA, CA 95521	NONE	PC	INCREASED ENVIRONMENTAL NEWS COVERAGE	25,000
LEAP31 JEFFERSON STREET NEW HAVEN, CT 06511	NONE	PC	GENERAL OPERATIONS	25,000
LEAP31 JEFFERSON STREET NEW HAVEN, CT 06511	NONE	PC	SUPPORT CHILDRENS PROGRAMS	25,000
Total ► 3a				2,542,500

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>				
MADISON ARTS AND CULTURAL ALLIANCE 10 LINCOLN PLACE PO BOX 178 MADISON, NJ 07940	NONE	PC	HOLIDAY CABARET	2,500
MADISON EDUCATION FOUNDATION INC PO BOX 1093 MADISON, NJ 07940	NONE	PC	GENERAL SUPPORT	1,000
MONTCLAIR STATE UNIVERSITY FOUNDATION INC 1 NORMAL AVENUE MONTCLAIR, NJ 07043	NONE	PC	GENERAL SUPPORT	10,000
Total ▶ 3a				2,542,500

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>				
MORRISTOWN NEIGHBORHOOD HOUSE ASSOC INC 80 WASHINGTON STREET MORRISTOWN, NJ 07960	NONE	PC	PRESCHOOL ARTS PROGRAM	5,000
MUSIC CONSERVATORY OF WESTCHESTER 216 CENTRAL AVENUE WHITE PLAINS, NY 10606	NONE	PC	PRE COLLEGE PROGRAM FOR HIGH SCHOOL MUSICIANS	50,000
NATIONAL INTERSCHOLASTIC CYCLING ASSOCIATION 123 S BROADWAY APT 9B IRVINGTON, NY 10533	NONE	PC	GENERAL SUPPORT	12,000
Total ▶ 3a				2,542,500

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>				
NEW JERSEY PERFORMING ARTS CENTER ONE CENTER STREET NEWARK, NJ 07102	NONE	PC	GENERAL SUPPORT	125,000
NEW YORK AND PRESBYTERIAN HOSPITAL 850 THIRD AVENUE 12TH FLOOR NEW YORK, NY 10022	NONE	PC	GENERAL SUPPORT	25,000
NEW YORK UNIVERSITY 22 WASHINGTON SQUARE NORTH ROOM 403 NEW YORK, NY 10011	NONE	PC	JONATHAN BOIES MEMORIAL FUND	150,000
Total ▶ 3a				2,542,500

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>				
OPEN DOOR SPORTS INC 9519 W STANHOPE ROAD KENSINGTON, MD 20895	NONE	PC	CINDY BROWN SPORTS AUTISM	2,500
OXFORD ACADEMY INC 1393 BOSTON POST ROAD WESTBROOK, CT 06498	NONE	PC	GENERAL SUPPORT	10,000
PEF ISRAEL ENDOWMENT FUNDS INC 630 THIRD AVENUE 15TH FLOOR NEW YORK, NY 10017	NONE	PC	GENERAL OPERATIONS	115,000
Total ▶ 3a				2,542,500

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>				
POINTS OF LIGHT FOUNDATION 575 5TH AVENUE NEW YORK, NY 10017	NONE	PC	POINTS OF LIGHT AWARD GALA	25,000
POINTSMAN FOUNDATION 880 WILD RICE CV AUSTIN, TX 78738	NONE	PC	FOR GENERAL SUPPORT	150,000
PROJECT KESHER 729 7TH AVENUE 9TH FLOOR NEW YORK, NY 10019	NONE	PC	WOMENS LEADERSHIP AND TRAINING PROGRAM	10,000
Total ▶ 3a				2,542,500

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				
ROSE CITY MONTESSORI SCHOOL 4 MADISON AVENUE MADISON, NJ 07940	NONE	PC	RAINBOW MONTESSORI SCHOOL	1,500
SACRED HEART UNIVERSITY 5151 PARK AVENUE FAIRFIELD, CT 06825	NONE	PC	GENERAL SUPPORT	50,000
SANTA FE INSTITUTE 1399 HYDE PARK RD SANTA FE, NM 87501	NONE	PC	GLOBAL CLASSROOM	50,000
Total ▶ 3a				2,542,500

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>				
SCHOOLHOUSE THEATRE FOUNDATION INC 8 FRONT STREET PO BOX 300 CROTON FALLS, NY 10519	NONE	PC	ORIGINAL PLAYS AND PERFORMANCE SPACE	25,000
SCIENCE FRIDAY INITIATIVE INC 19 W 44TH STREET SUITE 412 NEW YORK, NY 10036	NONE	PC	GENERAL OPERATIONS	35,000
ST MARTIN DE PORRES ACADEMY INC 208 COLUMBUS AVE NEW HAVEN, CT 06519	NONE	PC	GRADUATE SUPPORT PROGRAM	30,000
Total ▶ 3a				2,542,500

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>				
SYMPHONY OF WESTCHESTER INC 10 DAVID DRIVE NEW ROCHELLE, NY 10804	NONE	PC	GENERAL OPERATIONS	25,000
THE COMMUNITY FOUNDATION FOR GREATER NEW HAVEN 70 AUDUBON STREET NEW HAVEN, CT 06510	NONE	PC	GENERAL OPERATIONS	45,000
THE COMMUNITY FOUNDATION FOR GREATER NEW HAVEN 70 AUDUBON STREET NEW HAVEN, CT 06510	NONE	PC	GENERAL OPERATIONS	44,000
Total ▶ 3a				2,542,500

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 GOOD DOG FOUNDATION INC 500 SEVENTH AVENUE 8TH FLOOR NEW YORK, NY 10018	NONE	PC	GENERAL OPERATIONS	10,000
THE MID HUDSON HERITAGE CENTER INC 109 HOOKER AVENUE POUGHKEEPSIE, NY 12601	NONE	PC	SIMON STUDIO	25,000
THE OPPORTUNITY PROJECT INC 60 EAST WILLOW STREET MILLBURN, NJ 07041	NONE	PC	GENERAL SUPPORT	25,000
Total ▶ 3a				2,542,500

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 PALEY CENTER FOR MEDIA MUSEUM OF TELEVISION AND RADIO 25 W 52ND STREET NEW YORK, NY 10019	NONE	PC	CONTINUED FUNDING	75,000
THE PALEY CENTER FOR MEDIA MUSEUM OF TELEVISION AND RADIO 25 W 52ND STREET NEW YORK, NY 10019	NONE	PC	CONTINUED FUNDING	35,000
THEATRE DEVELOPMENT FUND INC 520 EIGHTH AVENUE 801 NEW YORK, NY 10018	NONE	PC	GENERAL SUPPORT	5,000
Total ▶ 3a				2,542,500

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>				
THROUGHLINE ARTIST 12 WEST 53RD STREET SUITE 22F NEW YORK, NY 10019	NONE	PC	FOR SUMMER SHORTS	25,000
TOWN OF HARRISON 1 HEINEMAN PLACE HARRISON, NY 10528	NONE	PC	SUMMER OUTDOOR CONCERT SERIES	20,000
TRUSTEES OF COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK PO BOX 137 136 S BROADWAY IRVINGTON, NY 10533	NONE	PC	NEVIS LABORATORY	10,000
Total ▶ 3a				2,542,500

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>				
UNIVERSITY OF CHICAGO (THE SMART MUSEUM OF ART) 5550 SOUTH GREENWOOD AVENUE CHICAGO, IL 60637	NONE	PC	SMART SCHOLARS RESEARCH PROJECT	100,000
UNIVERSITY OF MASSACHUSETTS - AMHERST 161 PRESIDENTS DRIVE AMHERST, MA 01003	NONE	PC	JEWISH HISTORY JOUNAL	25,000
UNIVERSITY OF WASHINGTON FOUNDATION 407 GERBERDING HALL BOX 351210 SEATTLE, WA 981951210	NONE	PC	RESTORATION OF THE ASUW SHELL HOUSE	25,000
Total ▶ 3a				2,542,500

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>				
UNTERMYER GARDENS CONSERVANCY 945 NORTH BROADWAY YONKERS, NY 10701	NONE	PC	RESTORATION AND DEVELOPMENT OF THE GARDEN	50,000
USHER III INITITATIVE 191 N WACKER DRIVE SUITE 1790 CHICAGO, IL 60606	NONE	PC	GENERAL SUPPORT	25,000
WESTCHESTER ARTS COUNCIL INC 31 MAMARONECK AVENUE 3RD FLOOR WHITE PLAINS, NY 10601	NONE	PC	PUBLIC ART PROJECT	25,000
Total ▶ 3a				2,542,500

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				
WHARTON INSTITUTE FOR PERFORMING ARTS INC 60 LOCUST AVENUE BERKELEY HEIGHTS, NJ 07922	NONE	PC	GENERAL SUPPORT	10,000
WHITE PLAINS LIBRARY FOUNDATION INC 100 MARITINE AVENUE WHITE PLAINS, NY 10601	NONE	PC	TROVE TIME	25,000
NEW ROCHELLE PUBLIC LIBRARY FOUNDATION INC 1 LIBRARY PLAZA NEW ROCHELLE, NY 10801	NONE	PC	COURTYARD AND SCULPTURE GARDEN	25,000
Total ▶ 3a				2,542,500

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>				
WISH NJ INC 1980 SPRINGFIELD AVENUE MAPLEWOOD, NJ 07040	NONE	PC	GENERAL SUPPORT	10,000
WYOMING COMMUNITY FOUNDATION 1472 N 5TH STREET SUITE 201 LARAMIE, WY 82072	NONE	PC	PILOT HILL PROJECT - WALKING PATH	25,000
Total ▶ 3a				2,542,500

TY 2019 Accounting Fees Schedule**Name:** SMART FAMILY FOUNDATION OF NEW YORK**EIN:** 81-3395492

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	69,227	13,845		55,382

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

TY 2019 Depreciation Schedule

Name: SMART FAMILY FOUNDATION OF NEW YORK
EIN: 81-3395492

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
IMPROVEMENTS (SHELVING , CARPETING)	2017-01-01	6,786	4,524	SL	3.00000000000000	2,262	0		
NEW COMPUTER EQUIPMENT	2017-01-01	4,647	3,098	SL	3.00000000000000	1,549	0		
LAPTOP	2017-01-01	8,896	5,930	SL	3.00000000000000	2,966	0		

TY 2019 General Explanation Attachment**Name:** SMART FAMILY FOUNDATION OF NEW YORK**EIN:** 81-3395492**General Explanation Attachment**

Identifier	Return Reference	Explanation	
1		PART VII-B, LINE 1A(4)	IN 2019 THE SMART FAMILY FOUNDATION OF NEW YORK ("THE FOUNDATION") PAID ITS DIRECTORS COMPENSATION FOR SERVICES RENDERED TO THE FOUNDATION. THE COMPENSATION WAS NOT EXCESSIVE AND THE SERVICES RENDERED BY THE DIRECTORS WERE REASONABLE AND NECESSARY FOR CARRYING OUT THE EXEMPT PURPOSE OF THE FOUNDATION.

TY 2019 Investments Corporate Stock Schedule**Name:** SMART FAMILY FOUNDATION OF NEW YORK**EIN:** 81-3395492**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
BERKSHIRE HATHAWAY INC CL-A	242,046	10,527,290
FIDELITY 500 INDEX FD	13,808,796	15,263,073
HEALTH CARE SELECT SECTOR	502,692	524,375
INVESCO QQQ TRUST SERIES 1	703,273	771,562
VANGUARD FINANCIALS ETF	1,000,981	1,142,293
TRIBUTARY SMALL CO INST PLUS	2,199,062	2,284,752
VANGUARD SMALL CAP ETF	2,798,932	2,943,423
DODGE & COX INTL STOCK FD	2,453,173	2,547,869
FIDELITY INTL INDX INST PRM	6,808,414	7,169,577
OARKMARK INTERNATIONAL INST	1,775,104	1,808,509
MATTHEWS PACIFIC TIGER INST	1,047,511	1,036,585
ISHARES CORE MSCI EMERGING	1,055,934	1,070,630

TY 2019 Investments Government Obligations Schedule**Name:** SMART FAMILY FOUNDATION OF NEW YORK**EIN:** 81-3395492**US Government Securities - End
of Year Book Value:**

13,054,459

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

13,348,785

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

0

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

0

**TY 2019 Land, Etc.
Schedule****Name:** SMART FAMILY FOUNDATION OF NEW YORK**EIN:** 81-3395492

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
IMPROVEMENTS (SHELVING , CARPETING)	6,786	6,786	0	0
NEW COMPUTER EQUIPMENT	4,647	4,647	0	0
LAPTOP	8,896	8,896	0	0

TY 2019 Legal Fees Schedule**Name:** SMART FAMILY FOUNDATION OF NEW YORK**EIN:** 81-3395492

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	27,875	5,575		22,300

TY 2019 Other Expenses Schedule**Name:** SMART FAMILY FOUNDATION OF NEW YORK**EIN:** 81-3395492**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MISCELLANEOUS	1,755	351		1,404
OFFICE SUPPLIES AND EXPENSE	1,520	304		1,216
TELEPHONE	1,081	216		865
ADP FEES	4,072	814		3,258
POSTAGE	564	113		451
INSURANCE	1,273	255		1,018
OTHER INVESTMENT EXPENSE	8,179	8,179		0

TY 2019 Other Liabilities Schedule**Name:** SMART FAMILY FOUNDATION OF NEW YORK**EIN:** 81-3395492

Description	Beginning of Year - Book Value	End of Year - Book Value
OTHER LIABILITY	0	142,080

TY 2019 Other Professional Fees Schedule**Name:** SMART FAMILY FOUNDATION OF NEW YORK**EIN:** 81-3395492

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT CUSTODIAN FEES	1,085	1,085		0
INVESTMENT MANAGEMENT FEES	184,654	184,654		0
PROFESSIONAL FEES	24,328	21,128		3,200
AUDIT EXPENSE	18,000	3,600		14,400

TY 2019 Taxes Schedule**Name:** SMART FAMILY FOUNDATION OF NEW YORK**EIN:** 81-3395492

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	9,525	9,525		0
INVESTMENT INCOME EXCISE TAX	180,000	0		0