

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

Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation
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 ▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0052
2019
Open to Public Inspection

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

Name of foundation The Rothman Family Charitable Foundation		A Employer identification number 81-4585139	
% Foundation Source		B Telephone number (see instructions) (800) 839-1754	
Number and street (or P.O. box number if mail is not delivered to street address) Foundation Source 501 Silverside Rd	Room/suite	C If exemption application is pending, check here <input type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code Wilmington, DE 198091377		D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>	
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		E If private foundation status was terminated under section 507(b)(1)(A), check here <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		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>1,769,441</u>		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis.)</i>	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</i>		(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)	354,120			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	151	151		
	4 Dividends and interest from securities	29,672	29,672		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	22,383			
	b Gross sales price for all assets on line 6a <u>531,833</u>				
	7 Capital gain net income (from Part IV, line 2)		281,209		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	2,845				
12 Total. Add lines 1 through 11	409,171	311,032			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	3,434	3,434		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	17	17		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	9,296			9,296
	24 Total operating and administrative expenses. Add lines 13 through 23	12,747	3,451		9,296
	25 Contributions, gifts, grants paid	75,750			75,750
26 Total expenses and disbursements. Add lines 24 and 25	88,497	3,451		85,046	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	320,674				
b Net investment income (if negative, enter -0-)		307,581			
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			
	2 Savings and temporary cash investments	17,424	8,321	8,321
	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)			
	b Investments—corporate stock (attach schedule)	1,308,061	1,637,838	1,761,120
	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 ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	1,325,485	1,646,159	1,769,441	
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 ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
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			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds	1,325,485	1,646,159	
29 Total net assets or fund balances (see instructions)	1,325,485	1,646,159		
30 Total liabilities and net assets/fund balances (see instructions) .	1,325,485	1,646,159		

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	1,325,485
2 Enter amount from Part I, line 27a	2	320,674
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	1,646,159
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	1,646,159

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.)
1 a Publicly-traded Securities			
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 531,833		250,624	281,209
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			281,209
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	281,209
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	52,563	1,343,788	0.039116
2017	65,289	1,116,250	0.05849
2016		984,968	
2015	0	0	0.0
2014	0	0	0.0

2 Total of line 1, column (d)	2	0.097606
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	0.032535
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	1,410,470
5 Multiply line 4 by line 3	5	45,890
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,076
7 Add lines 5 and 6	7	48,966
8 Enter qualifying distributions from Part XII, line 4	8	85,046

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)

Table with 11 rows for excise tax calculation. Includes questions about exempt foundations, tax under section 511, and tax based on investment income. Total tax due is 3,076.

Part VII-A Statements Regarding Activities

Table with 10 rows for statements regarding activities. Includes questions about political campaigns, political expenditures, and other activities. Columns for 'Yes' and 'No' answers.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-14 regarding controlled entities, donor advised funds, public inspection requirements, and books in care.

Located at 501 Silverside Road Suite 123 Wilmington DE ZIP+4 198091377

Row 15: Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041. Row 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?

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.

Main table for Part VII-B with 3 columns: Question, Yes, No. Rows 1a-4b covering various activities like sale of property, borrowing money, compensation, taxes on failure to distribute income, and business holdings.

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? Yes No

(3) Provide a grant to an individual for travel, study, or other similar purposes? Yes No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions. Yes No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? Yes No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions
 Organizations relying on a current notice regarding disaster assistance check here.

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? Yes No
 If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? Yes No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Yes No
 If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Yes No

b If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction? Yes No

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year? Yes No

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

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Alexandra Rothman Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Sec, VP 0	0	0	0
Fred Rothman Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Dir, Pres 1.0	0	0	0
Jodi S Rothman Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Dir, Treas, VP 5.0	0	0	0
Lecia Rothman Foundation Source 501 Silverside Rd Wilmington, DE 198091377	VP 1.0	0	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

Total number of other employees paid over \$50,000.

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

Total number of others receiving over \$50,000 for professional services. ▶

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 ▶

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	1,413,691
b	Average of monthly cash balances.	1b	18,258
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,431,949
e	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	0
3	Subtract line 2 from line 1d.	3	1,431,949
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	21,379
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,410,470
6	Minimum investment return. Enter 5% of line 5.	6	70,524

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	70,524
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	3,076
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	3,076
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	67,448
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	67,448
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	67,448

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	85,046
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	85,046
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	3,076
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	81,970

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				67,448
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.				
b Total for prior years: 2017, 2016, 2015				
3 Excess distributions carryover, if any, to 2019:				
a From 2014.				
b From 2015.				
c From 2016.				
d From 2017.			9,389	
e From 2018.				
f Total of lines 3a through e.	9,389			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ <u>85,046</u>				
a Applied to 2018, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2019 distributable amount.				67,448
e Remaining amount distributed out of corpus	17,598			
5 Excess distributions carryover applied to 2019. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:	26,987			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
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.				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	26,987			
10 Analysis of line 9:				
a Excess from 2015.				
b Excess from 2016.				
c Excess from 2017.			9,389	
d Excess from 2018.				
e Excess from 2019.			17,598	

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				(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).) See Additional Data Table

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	75,750
b <i>Approved for future payment</i>				
Total			▶ 3b	

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

Part XVII

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

Table with 3 columns: Question, Yes, No. Rows 1a(1), 1a(2), 1b(1) through 1b(6), 1c.

a Transfers from the reporting foundation to a noncharitable exempt organization of:

- (1) Cash.
(2) Other assets.

b Other transactions:

- (1) Sales of assets to a noncharitable exempt organization.
(2) Purchases of assets from a noncharitable exempt organization.
(3) Rental of facilities, equipment, or other assets.
(4) Reimbursement arrangements.
(5) Loans or loan guarantees.
(6) Performance of services or membership or fundraising solicitations.

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation.

Schedule table with 4 columns: (a) Line No., (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements.

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527?

Yes No

b If "Yes," complete the following schedule.

Schedule table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship.

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

Sign Here

Signature of officer or trustee, Date (2020-11-10), Title

May the IRS discuss this return with the preparer shown below (see instr.) Yes No

Paid Preparer Use Only

Table for paid preparer information: Print/Type preparer's name (Jeffrey D Haskell), Preparer's Signature, Date, Check if self-employed, PTIN (P01345770), Firm's name (Foundation Source), Firm's address (One Hollow Ln Ste 212, Lake Success, NY 11042), Firm's EIN, Phone no. (800) 839-1754.

Form 990PF Part XV Line 1a - 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).

Fred Rothman

Jodi S Rothman

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>				
ALZHEIMERS DISEASE AND RELATED DISORDERS ASSOCIATI 225 N MICHIGAN AVE 17TH FL CHICAGO, IL 60601	N/A	PC	Charitable Event	500
AMERICAN CANCER SOCIETY 2310 RTE 34 STE 1D MANASQUAN, NJ 08736	N/A	PC	General & Unrestricted	500
AMERICAN CANCER SOCIETY INC 621 CLEARWATER PARK RD WEST PALM BEACH, FL 33401	N/A	PC	Charitable Event	250
Total ▶ 3a				75,750

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN CANCER SOCIETY INC 1818 MARKET ST STE 2820 PHILADELPHIA, PA 19103	N/A	PC	General & Unrestricted	10,000
APPEAL OF CONSCIENCE FOUNDATION 119 W 57TH ST STE 820 NEW YORK, NY 10019	N/A	PC	General & Unrestricted	5,000
BRRH FOUNDATION INC 745 MEADOWS RD BOCA RATON, FL 33486	N/A	PC	Charitable Event	500
Total ▶ 3a				75,750

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>				
DOLPHINS CYCLING CHALLENGE INC 347 DON SHULA DR MIAMI GARDENS, FL 33056	N/A	PC	General & Unrestricted	17,500
GIFT OF LIFE MARROW REGISTRY INC 5901 BROKEN SOUND PKWY NW STE 600 BOCA RATON, FL 33487	N/A	PC	Charitable Event	1,000
HILLEL THE FOUNDATION FOR JEWISH CAMPUS LIFE - GRE 1100 STANFORD DR CORAL GABLES, FL 33146	N/A	PC	BaseMiami pROGRAM	500
Total ▶ 3a				75,750

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>				
LEUKEMIA & LYMPHOMA SOCIETY- GREATER SAN FRANCISCO 101 MONTGOMERY ST STE 750 SAN FRANCISCO, CA 94104	N/A	PC	General & Unrestricted	1,000
MEMORIAL SLOAN-KETTERING CANCER CENTER 885 2ND AVE 7TH FL NEW YORK, NY 10017	N/A	PC	Cycle for Survival program	1,000
NATIONAL MULTIPLE SCLEROSIS SOCIETY 659 TOWER AVE 1ST FL HARTFORD, CT 06112	N/A	PC	General & Unrestricted	11,000
Total ▶ 3a				75,750

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NATIONAL MULTIPLE SCLEROSIS SOCIETY 659 TOWER AVE 1ST FL HARTFORD, CT 06112	N/A	PC	Marathon Strides Against MS PROGRAM	10,000
NATIONAL MULTIPLE SCLEROSIS SOCIETY 3125 W COMMERCIAL BLVD STE 100 FT LAUDERDALE, FL 33309	N/A	PC	General & Unrestricted	10,000
OCEAN PROFESSIONAL THEATRE COMPANY INC 521B AMBER ST BEACH HAVEN, NJ 08008	N/A	PC	The Surfliht Theatre FUND	500
Total ▶ 3a				75,750

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>				
PAPANICOLAOU CORPS FOR CANCER RESEARCH INC 1192 E NEWPORT CTR DR STE 230 DEERFIELD BCH, FL 33442	N/A	PC	Champions for Cancer Research PROGRAM	500
PARKINSONS FOUNDATION INC 1359 BROADWAY RM 1509 NEW YORK, NY 10018	N/A	PC	Charitable Event	500
STYLE SAVES INC 1800 N MIAMI AVE MIAMI, FL 33136	N/A	PC	General & Unrestricted	1,000
Total ▶ 3a				75,750

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 INSTITUTE FOR CHILDREN WITH CANCER AND BLOOD D 121 SOMERSET ST NEW BRUNSWICK, NJ 08901	N/A	PC	General & Unrestricted	500
THE RWJ UNIVERSITY HOSPITAL FOUNDATION INC 10 PLUM ST STE 910 NEW BRUNSWICK, NJ 08901	N/A	PC	Charitable Event	3,000
TRENTON PUBLIC EDUCATION FOUNDATION INC PO BOX 22545 TRENTON, NJ 08607	N/A	PC	General & Unrestricted	1,000
Total ▶ 3a				75,750

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

TY 2019 Depreciation Schedule

Name: The Rothman Family Charitable Foundation

EIN: 81-4585139

TY 2019 Investments Corporate Stock Schedule**Name:** The Rothman Family Charitable Foundation**EIN:** 81-4585139**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AB INTL SMALL CAP PORTFOLIO AD	44,070	44,563
AB INTL STRATEGIC EQUITIES POR	142,065	147,684
AB SMALL CAP CORE PORTFOLIO AD	20,188	21,008
ADOBE SYSTEMS, INC	1,316	1,979
ALLIANCEBERN DISCOVERY GROWTH	16,984	18,029
ALLIANCEBERN DISCOVERY VALUE F	18,385	17,646
ALLIANCEBERN GLOBAL BOND ADV	147,223	148,214
ALLIANCEBERNSTEIN BOND INFLATI	14,882	15,089
ALLIANCEBERNSTEIN REALL ASSET	65,577	67,108
ALPHABET INC CL C	14,613	17,381
ALTRIA GROUP INC	2,463	2,246
AMAZON COM	3,767	3,696
AMERICAN ELECTRIC POWER INC	4,090	5,293
ANTHEM INC	3,551	4,530
APPLE INC	8,245	14,389
AUTOMATIC DATA PROCESSING INC	2,632	3,240
AUTOZONE INC	3,111	4,765
BANK OF AMERICA CORP	6,787	9,016
BERKSHIRE HATHAWAY INC. CLASS	6,930	7,701
BERNSTEIN EMERGING MARKETS	20,748	21,175
BERNSTEIN INTERMEDIATE DURATIO	145,967	148,691
BERNSTEIN INTERNATIONAL PORTFO	78,783	82,650
BOEING CO	2,526	2,932
BOOKING HOLDINGS INC	3,821	4,107
BROADCOM INC	4,029	4,424
CBRE GROUP	3,063	3,923
CDW CORP	1,405	2,571
CHECK POINT SOFTWARE TECHNOLOG	2,486	2,330
CHEVRON CORP	4,868	4,700
CISCO SYSTEMS INC	4,195	4,988

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CITIGROUP INC	5,714	6,391
CITRIX SYSTEMS INC	1,744	1,996
COMCAST CORP	6,739	8,005
COSTCO WHOLESALE CORPORATION	2,132	2,939
CUBESMART	2,448	2,455
DELTA AIR LINES INC	3,366	3,860
DOLLAR GENERAL CORP	2,331	2,964
EATON CORP PLC	2,124	2,557
EDWARDS LIFESCIENCES	1,872	3,266
ELECTRONIC ARTS	2,772	3,118
EOG RESOURCES INC	5,001	5,026
EVEREST RE GROUP LTD	2,108	2,492
F5 NETWORKS, INC	1,655	1,676
FACEBOOK INC	9,211	11,289
FIDELITY NATIONAL FINANCIAL IN	2,680	2,993
FIDELITY NATIONAL INFORMATION	2,492	3,060
GILEAD SCIENCES INC	2,189	2,144
GOLDMAN SACHS GROUP	4,574	4,829
HOME DEPOT INC	5,254	6,770
HONEYWELL INTL	3,861	5,133
INTEL CORP	1,732	1,796
JOHNSON & JOHNSON	5,062	5,543
JP MORGAN CHASE	5,876	8,503
LENNAR CORP	158,578	163,073
LENNAR CORP CL B	2,510	2,593
MAGNA INTERNATIONAL INC	3,383	3,784
MEDTRONIC PLC	3,599	3,857
MERCK & CO INC	4,518	5,457
MICROSOFT CORP	14,430	22,236
MID-AMERICA APT COMMUNITIES IN	4,659	5,538

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
NEXTERA ENERGY, INC	2,795	2,906
NIKE INC-CL B	3,218	4,762
NORFOLK SOUTHERN CORP	2,200	3,106
NOVO NORDISK A S	2,195	2,489
ORACLE CORP	3,641	3,974
PAYPAL HOLDINGS, INC	2,582	3,029
PEPSICO INC	4,868	5,740
PFIZER INC	5,377	5,995
PHILLIPS 66	2,269	2,451
PNC FINANCIAL GROUP INC	2,551	2,714
PROCTER GAMBLE CO	4,640	5,995
PROGRESSIVE CORP OHIO	4,132	5,212
RAYTHEON CO	3,114	3,516
REGENCY CENTERS CORP	2,972	2,839
REGENERON PHARMACEUTICALS INC	2,090	2,253
REINSURANCE GROUP AMER INC	2,775	2,935
ROCHE HOLDING LTD ADR	5,005	5,814
ROSS STORES, INC	2,479	3,260
ROYAL DUTCH SHEL PLC SPONS ADR	5,414	5,337
SANFORD C BERNSTEIN FD, INC OV	352,949	383,354
SANFORD C. BERNSTEIN FD, INC.	90,932	91,921
STARBUCKS CORP COM	3,205	3,341
SYNCHRONY FINANCIAL	2,744	3,097
TEXAS INSTRUMENTS INC	3,953	5,003
TJX COMPANIES INC	3,208	4,824
UNITEDHEALTH GROUP INC	7,420	10,289
US FOODS HOLDING CORPORATION	1,634	2,011
VERIZON COMMUNICATIONS	4,202	4,973
VERTEX PHARMCTLS INC	3,031	3,503
VISA INC	5,374	8,080

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
WAL-MART STORES INC	4,586	5,704
WALT DISNEY HOLDINGS CO	2,758	3,471
WELLS FARGO & CO	7,304	7,478
WESTLAKE CHEMICAL CORP	2,668	2,596
XILINX INC	1,299	1,369
ZOETIS INC	2,870	4,368

TY 2019 Other Expenses Schedule**Name:** The Rothman Family Charitable Foundation**EIN:** 81-4585139**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative Fees	9,271			9,271
State or Local Filing Fees	25			25

TY 2019 Other Income Schedule**Name:** The Rothman Family Charitable Foundation**EIN:** 81-4585139**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Federal Tax Refund	2,845		

TY 2019 Other Professional Fees Schedule**Name:** The Rothman Family Charitable Foundation**EIN:** 81-4585139

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Management Services	3,434	3,434		

TY 2019 Taxes Schedule**Name:** The Rothman Family Charitable Foundation**EIN:** 81-4585139

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foreign Tax Paid	17	17		

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

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

OMB No. 1545-0047
2019

Name of the organization
The Rothman Family Charitable Foundation

Employer identification number
81-4585139

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)() (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private 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 other 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 990PF, 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
The Rothman Family Charitable Foundation

Employer identification number
81-4585139

Part I
Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Rothman Fred 4086 Live Oaks Boulevard Del Ray Beach, FL 33445	\$ 354,120	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization The Rothman Family Charitable Foundation	Employer identification number 81-4585139
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Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	LENNAR CORP LEN, 6000 sh.	\$ 354,120	2019-10-04
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	

Name of organization
The Rothman Family Charitable Foundation

Employer identification number

81-4585139

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	