

"EXTENSION GRANTED TO 01/15/2021"

Return of Private Foundation

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

OMB No 1545-0047

2019

Open to Public Inspection

Form 990-PF

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

2002

For calendar year 2019 or tax year beginning

MAR 1, 2019

, and ending

FEB 29, 2020

Name of foundation

MITCHELL WOLFSON SR. FOUNDATION
C/O AKERMAN SENTERFITT

A Employer identification number

59-2390240

Number and street (or P O box number if mail is not delivered to street address)

98 S.E. 7TH STREET

Room/suite

1100

B Telephone number

305-373-0123

City or town, state or province, country, and ZIP or foreign postal code

MIAMI, FL 33131

C If exemption application is pending, check here ☐

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐I Fair market value of all assets at end of year
(from Part II, col. (c), line 16)J Accounting method: ☒ Cash ☐ Accrual☐ Other (specify)F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐Part I Analysis of Revenue and Expenses
(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received			N/A	
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	5,297,853.	5,297,853.		STATEMENT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	27,756,336.			
b Gross sales price for all assets on line 6a				
7 Capital gain net income (from Part IV, line 2)		27,756,336.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income	1,616,609.			STATEMENT 2
12 Total Add lines 1 through 11	34,670,798.	33,054,189.		
13 Compensation of officers, directors, trustees, etc	695,000.	347,500.		347,500.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees STMT 3	273,376.	182,251.		91,125.
b Accounting fees STMT 4	50,000.	33,333.		16,667.
c Other professional fees STMT 5	3,155,691.	2,208,984.		946,707.
17 Interest	144,123.	144,123.		0.
18 Taxes STMT 6	409,892.	183,003.		0.
19 Depreciation and depletion	3.	3.		
20 Occupancy				
21 Travel, conferences, and meetings	3,512.	3,161.		351.
22 Printing and publications				
23 Other expenses STMT 7	15,520.	1,717.		818.
24 Total operating and administrative expenses Add lines 13 through 23	4,747,117.	3,104,075.		1,403,168.
25 Contributions, gifts, grants paid	11,091,457.			11,091,457.
26 Total expenses and disbursements Add lines 24 and 25	15,838,574.	3,104,075.		12,494,625.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	18,832,224.			
b Net investment income (if negative, enter -0-)		29,950,114.		
c Adjusted net income (if negative, enter -0-)			N/A	

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MITCHELL WOLFSON SR. FOUNDATION

Form 990-PF (2019)

C/O AKERMAN SENTERFITT

59-2390240

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		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		20,840,488.	9,512,646.	9,512,646.
	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				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		460,000.	468,111.	468,111.
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock STMT 10		47,399,793.	48,582,427.	71,014,265.
	c	Investments - corporate bonds				
	11	Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 11		136,894,297.	173,710,912.	165,403,993.	
14	Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		205,594,578.	232,274,096.	246,399,015.	
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				
	22	Other liabilities (describe ▶ STATEMENT 12)		2,500,000.	0.	
23	Total liabilities (add lines 17 through 22)		2,500,000.	0.		
Net Assets or Fund Balances		Foundations that follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 24, 25, 29, and 30				
	24	Net assets without donor restrictions		203,094,578.	232,274,096.	
	25	Net assets with donor restrictions				
		Foundations that do not follow FASB ASC 958, check here ▶ <input 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				
	29	Total net assets or fund balances		203,094,578.	232,274,096.	
30	Total liabilities and net assets/fund balances		205,594,578.	232,274,096.		

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	203,094,578.
2	Enter amount from Part I, line 27a	2	18,832,224.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	10,730,240.
4	Add lines 1, 2, and 3	4	232,657,042.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 9	5	382,946.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	232,274,096.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, 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	BLUE WOLF		01/01/19	12/31/19
b	BLUE WOLF		01/01/19	12/31/19
c	CARVAL		01/01/19	12/31/19
d	CARVAL		01/01/19	12/31/19
e	CD&R FUND		01/01/19	12/31/19
f	CEVIAN CAPITAL II		01/01/19	12/31/19
g	CEVIAN CAPITAL II		01/01/19	12/31/19
h	CHAMPLAIN SMALL CAPITAL FUND		01/01/19	12/31/19
i	CHAMPLAIN SMALL CAPITAL FUND		01/01/19	12/31/19
j	DENHAM COMMODITY V		01/01/19	12/31/19
k	DENHAM COMMODITY VI		01/01/19	12/31/19
l	DENHAM COMMODITY VI		01/01/19	12/31/19
m	EDGBASTON ASIAN EQUITY TRUST		01/01/19	12/31/19
n	EDGBASTON ASIAN EQUITY TRUST		01/01/19	12/31/19
o	FORESTER PARTNERS		01/01/19	12/31/19

(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			3,331.
b			590,426.
c			3,596.
d			117,900.
e			6,671.
f			-247,671.
g			-243,941.
h			50,041.
i			1,728,814.
j			-24,620.
k			-695.
l			52,943.
m			17,426.
n			-10,920.
o			688.

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

(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	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			3,331.
b			590,426.
c			3,596.
d			117,900.
e			6,671.
f			-247,671.
g			-243,941.
h			50,041.
i			1,728,814.
j			-24,620.
k			-695.
l			52,943.
m			17,426.
n			-10,920.
o			688.

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

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):

If gain, also enter in Part I, line 8, column (c).

If (loss), enter "-0-" in Part I, line 8

3

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	FORESTER PARTNERS		01/01/19	12/31/19
b	GENERATION IM GLOBAL		01/01/19	12/31/19
c	GENERATION IM GLOBAL		01/01/19	12/31/19
d	GENERATION MAF GLOBAL		01/01/19	12/31/19
e	GENERATION MAF GLOBAL		01/01/19	12/31/19
f	MASON CAPITAL		01/01/19	12/31/19
g	MVC PRIVATE EQUITY FUND		01/01/19	12/31/19
h	QUINTANA ENERGY		01/01/19	12/31/19
i	NT GAMCO		03/01/19	02/29/20
j	NORTHERN TRUST - SEE ATTACHED		03/01/19	02/29/20
k	NORTHERN TRUST - SEE ATTACHED		03/01/19	02/29/20
l	NORTHERN TRUST - CAPITAL GAIN DIVIDENDS		03/01/19	02/29/20
m	RAM REALTY		01/01/19	12/31/19
n	ROCKET CAPITAL PARTNERS		01/01/19	12/31/19
o	ROCKET CAPITAL PARTNERS		01/01/19	12/31/19

(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			-1,920.
b			302,475.
c			1,451,684.
d			20,354.
e			133,781.
f			29,355.
g			196,534.
h			-71,519.
i			151,906.
j			277,448.
k			19,848,493.
l			6,235.
m			312.
n			-1,752.
o			-36,675.

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

(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	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-1,920.
b			302,475.
c			1,451,684.
d			20,354.
e			133,781.
f			29,355.
g			196,534.
h			-71,519.
i			151,906.
j			277,448.
k			19,848,493.
l			6,235.
m			312.
n			-1,752.
o			-36,675.

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

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

3

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	SANDLER CAPITAL PARTNERS V		01/01/19	12/31/19
b	SG GROWTH		01/01/19	12/31/19
c	SILCHESTER INTERNATIONAL		01/01/19	12/31/19
d	SILCHESTER INTERNATIONAL		01/01/19	12/31/19
e	TIFF PRIVATE		01/01/19	12/31/19
f	TIFF PRIVATE		01/01/19	12/31/19
g	TIFF SECONDARY PARTNERS		01/01/19	12/31/19
h	TIFF SECONDARY PARTNERS		01/01/19	12/31/19
i	WP XI PARTNERS		01/01/19	12/31/19
j	WP XI PARTNERS		01/01/19	12/31/19
k	COLCHESTER GLOBAL BOND FUND		01/01/19	12/31/19
l	COLCHESTER GLOBAL BOND FUND		01/01/19	12/31/19
m				
n				
o				

(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			-10,994.
b			373,205.
c			45,849.
d			625,295.
e			-345.
f			1,874,844.
g			-37.
h			-2,630.
i			15,961.
j			401,111.
k			9,950.
l			73,427.
m			
n			
o			

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

(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	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-10,994.
b			373,205.
c			45,849.
d			625,295.
e			-345.
f			1,874,844.
g			-37.
h			-2,630.
i			15,961.
j			401,111.
k			9,950.
l			73,427.
m			
n			
o			

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	27,756,336.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	N/A

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a					
b SEE ATTACHED STATEMENTS					
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					
b					
c					
d					
e			27,756,336.		
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
b					
c					
d					
e			27,756,336.		
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	27,756,336.	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8			3	N/A	

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	11,754,771.	244,551,696.	.048067
2017	10,569,967.	244,142,369.	.043294
2016	11,641,082.	229,473,664.	.050729
2015	10,730,039.	229,596,294.	.046734
2014	12,128,115.	236,798,521.	.051217
2 Total of line 1, column (d)			2 .240041
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 .048008
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 252,493,084.
5 Multiply line 4 by line 3			5 12,121,688.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 299,501.
7 Add lines 5 and 6			7 12,421,189.
8 Enter qualifying distributions from Part XII, line 4 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.			8 12,494,625.

MITCHELL WOLFSON SR. FOUNDATION

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C/O AKERMAN SENTERFITT

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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	299,501.
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	299,501.
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	299,501.
6 Credits/Payments:			
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	467,105.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
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	467,105.	
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	167,604.	
11 Enter the amount of line 10 to be. Credited to 2020 estimated tax <input checked="" type="checkbox"/> 167,604. Refunded <input type="checkbox"/>	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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions <input checked="" type="checkbox"/> FL		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	X	
14 The books are in care of ► GLSC & COMPANY Telephone no. ► 305-373-0123 Located at ► 6303 BLUE LAGOON DRIVE, SUITE 200, MIAMI, FL ZIP+4 ► 33126		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A		
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

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

	Yes	No
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		
1a During the year, did the foundation (either directly or indirectly):		
(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 Organizations relying on a current notice regarding disaster assistance, check here ► <input type="checkbox"/>	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____, _____, _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	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. ► _____, _____, _____		
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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b	X

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	N/A	5b
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	N/A	
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?		6b
If "Yes" to 6b, file Form 8870.		X
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?	N/A	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(s) 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, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 13		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

0

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
GAMCO INVESTORS, INC. 655 THIRD AVENUE, NEW YORK, NY 10017	INVESTMENT ADVISOR	437,123.
THE NORTHERN TRUST COMPANY P.O. BOX 803878, CHICAGO, IL 60680	INVESTMENT ADVISOR	299,557.
SILCHESTER INTERNATIONAL - 780 THIRD AVENUE, 42ND FLOOR, NEW YORK, NY 10017	INVESTMENT ADVISOR	278,491.
AKERMAN SENTERFITT - ONE SE THIRD AVENUE 28TH FLOOR, MIAMI, FL 33131	ATTORNEYS	273,376.
COLONIAL CONSULTING LLC 750 3RD AVE #20, NEW YORK, NY 10017	INVESTMENT ADVISOR	184,863.

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

4

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 UNDER THE WILL OF THE LATE COLONEL WOLFSON THE FOUNDATION IS REQUIRED TO MAKE CONTRIBUTIONS TO THE MIAMI DADE COLLEGE	8,871,542.
2 UNDER THE WILL OF THE LATE COLONEL WOLFSON THE FOUNDATION IS REQUIRED TO MAKE CONTRIBUTIONS TO THE UNIVERSITY OF MIAMI SCHOOL OF MEDICINE	1,104,800.
3 UNDER THE WILL OF THE LATE COLONEL WOLFSON THE FOUNDATION IS REQUIRED TO MAKE CONTRIBUTIONS TO THE MIAMI JEWISH HOME AND HOSPITAL FOR AGED	552,400.
4 UNDER THE WILL OF THE LATE COLONEL WOLFSON THE FOUNDATION IS REQUIRED TO MAKE CONTRIBUTIONS TO THE MT. SINAI HOSPITAL OF GREATER MIAMI	220,960.

Part IX-B Summary of Program-Related Investments

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	250,229,106.
b	Average of monthly cash balances	1b	6,525,717.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	256,754,823.
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	416,667.
3	Subtract line 2 from line 1d	3	256,338,156.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,845,072.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	252,493,084.
6	Minimum investment return Enter 5% of line 5	6	12,624,654.

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	12,624,654.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	299,501.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	299,501.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	12,325,153.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	12,325,153.
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	12,325,153.

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	12,494,625.
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	12,494,625.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b	5	299,501.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	12,195,124.

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				12,325,153.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			10,941,457.	
b Total for prior years:		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: ▶ \$ 12,494,625.				
a Applied to 2018, but not more than line 2a			10,941,457.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2019 distributable amount				1,553,168.
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.	0.			
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 instr.			0.	
f Undistributed income for 2019: Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				10,771,985.
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	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				

N/A

- 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(i)(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(i)(3)(B)(iii)
 - (3) Largest amount of support from an exempt organization
 - (4) Gross investment income

1 Information Regarding Foundation Managers:

- NONE

- 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.

NONE

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.

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution * *	Amount
a Paid during the year				
AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVE. DALLAS, TX 75231		MEDICAL ORGANIZATION	EFFORTS TO REDUCE DEATH CAUSED BY HEART DISEASE AND STROKE. ALSO LEARN ABOUT CARDIOVASCULAR	5,000.
ARSHT CENTER FOUNDATION 1300 BISCAYNE BLVD MIAMI, FL 33132		EDUCATIONAL ORGANIZATION	TO PROVIDE CONTINUING OPERATING SUPPORT FOR THE ADRIENNE ARSHT CENTER FOR THE PERFORMING ARTS BY	10,000.
ARTIS NAPLES 5833 PELICAN BAY BOULEVARD NAPLES, FL 34108		EDUCATIONAL ORGANIZATION	TO PROMOTE THE ARTS	25,000.
AUDUBON HOUSE 205 WHITEHEAD STREET KEY WEST, FL 33040		EDUCATIONAL ORGANIZATION	TO PROMOTE KEY WEST'S HERITAGE	15,000.
BASCOM PALMER 900 NW 17TH STREET MIAMI, FL 33136		MEDICAL ORGANIZATION	TO FUND HOSPITAL OPERATIONS	5,000.
Total	SEE CONTINUATION SHEET(S)			11,091,457.
b Approved for future payment				
NONE				
Total				0.

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CAMILLUS HOUSE 1603 NW 7 AVENUE MIAMI, FL 33136		CHARITY	TO PROVIDE SELF-ENRICHMENT TO THE POOR AND HOMELESS AS A CONTINUUM OF CARE	1,000.
CARE ELEMENTARY SCHOOL 2025 NW 1ST AVE MIAMI, FL 33127		EDUCATIONAL ORGANIZATION	TO PROVIDE A NURTURING CHRISTIAN ENVIRONMENT WHERE CHILDREN FROM THE OVERTOWN COMMUNITY RECEIVE THE BEST	2,000.
CENTER THEATRE GROUP 601 W TEMPLE ST LOS ANGELES, CA 90012		NONPROFIT THEATRE COMPANY	TO SERVE THE DIVERSE AUDIENCES OF LOS ANGELES BY PRODUCING AND PRESENTING THEATRE OF THE HIGHEST	15,000.
CHILDREN'S BURN FOUNDATION P.O. BOX 678369 ORLANDO, FL 32867		MEDICAL ORGANIZATION	TO ADDRESS THE NEEDS OF CHILDREN WHO HAVE SUFFERED SEVERE BURN INJURIES.	10,000.
FLORIDA HOUSE, WASHINGTON, DC 1 2ND STREET NORTHEAST WASHINGTON, DC 20002	DESIGNATED ORGANIZATION	CHARITY	TO PROVIDE CULTURAL, SOCIAL, EDUCATIONAL AND ECONOMIC	22,096.
GREATER MIAMI JEWISH FEDERATION 4200 BISCAYNE BLVD MIAMI, FL 33126		CHARITY	TO UNIFY THE JEWISH COMMUNITY	2,500.
MCCJ, INC 150 SE 2ND AVE STE 914 MIAMI, FL 33131		NON-PROFIT ORGANIZATION	TO URGE EVERYONE TO EXAMINE THEIR CONSCIENCES AND ACT AS RESPONSIBLE CITIZENS IN CONTACTING THEIR	5,500.
MIAMI DADE COLLEGE 300 NE 2ND AVENUE MIAMI, FL 33132-2204	DESIGNATED ORGANIZATION	EDUCATIONAL ORGANIZATION	IMPROVE HIGHER EDUCATION IN SOUTH FLORIDA	8,871,542.
MIAMI JEWISH HOME & HOSPITAL FOR THE AGED 5200 NE 2ND AVENUE MIAMI, FL 33137	DESIGNATED ORGANIZATION	MEDICAL ORGANIZATION	TO PROVIDE HEALTH CARE FOR THE ELDERLY IN SOUTH FLOR	552,400.
MIAMI-DADE FOUNDATION 200 SOUTH BISCAYNE BLVD, SUITE 505 MIAMI, FL 33131	DESIGNATED ORGANIZATION	CHARITY	TO PROMOTE CHARITABLE GIVING IN SOUTH FLORIDA	55,240.
Total from continuation sheets				11,031,457.

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MOTHERS AGAINST DRUNK DRIVING 511 E. JOHN CARPENTER FREEWAY IRVING, TX 75062		PUBLIC CHARITY	TO END DRUNK DRIVING, HELP FIGHT DRUGGED DRIVING, SUPPORT THE VICTIMS OF THESE VIOLENT CRIMES, AND	1,000.
MOUNT SINAI HOSPITAL 4302 ALTON ROAD MIAMI BEACH, FL 33140	DESIGNATED ORGANIZATION	MEDICAL ORGANIZATION	TO IMPROVE MEDICAL CARE	220,960.
PRINCETON UNIVERSITY NASSAU HALL 1 PRINCETON, NJ 08542		EDUCATIONAL ORGANIZATION	TO PROVIDE UNDERGRADUATE AND GRADUATE INSTRUCTION IN DIFFERENT CAREERS.	500.
ST. LUKE'S 7707 NW 2ND AVENUE MIAMI, FL 33130		CHARITY	RECOVERY CENTER	2,500.
STETSON UNIVERSITY 421 N. WOODLAND BLVD DELAND, FL 32723		EDUCATIONAL ORGANIZATION	PROVIDE HIGHER EDUCATION	1,000.
SUN VALLEY CENTER FOR THE ARTS 191 5TH STREET EAST KETCHUM, ID 83340		EDUCATIONAL ORGANIZATION	TO PROMOTE THE ARTS	5,000.
TEMPLE BETH AM FOUNDATION 5950 N. KENDALL DRIVE PINECREST, FL 33156		EDUCATIONAL ORGANIZATION	EMBRACING JEWISH LIFE	5,500.
THE EDUCATION FUND 900 NE 125TH STREET, SUITE 110 NORTH MIAMI, FL 33161		EDUCATIONAL ORGANIZATION	TO PROMOTE EDUCATION	1,000.
THE HERALD CHARITIES 3511 NW 91ST AVE DORAL, FL 33172		NONPROFIT ORGANIZATION	THE MIAMI HERALD CHARITIES, INC. IS PRIMARILY INVOLVED IN THE ACCUMULATION OF FUNDS FOR CHARITABLE	5,000.
THE WOLFSONIAN - FIU 1001 WASHINGTON AVENUE MIAMI BEACH, FL 33139		EDUCATIONAL ORGANIZATION	TO PROMOTE MUSEUM OPERATIONS AND EXHIBITIONS	47,460.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
TURNING POINT 6227 SHELDON ROAD TAMPA, FL 33615		PUBLIC CHARITY	TO ASSIST PEOPLE IN NEED IN FINDING A NEW LIFE EVERY STEP OF THE WAY.	5,500.
UNIVERSITY OF MIAMI SCHOOL OF MEDICINE 1475 NW 12 AVENUE MIAMI, FL 33136	DESIGNATED ORGANIZATION	MEDICAL ORGANIZATION	TO FUND MEDICAL EDUCATION IN SOUTH FLORIDA	1,104,800.
UNIVERSITY OF RICHMOND 28 WESTHAMPTON WAY RICHMOND, VA 23173		EDUCATIONAL ORGANIZATION	TO PROVIDE A COLLABORATIVE LEARNING AND RESEARCH ENVIRONMENT UNLIKE ANY OTHER IN HIGHER	15,000.
UNIVERSITY OF SOUTHERN CALIFORNIA UNIVERSITY OF SOUTHERN CALIFORNIA LOS ANGELES, CA 90007		EDUCATIONAL ORGANIZATION	TO PROMOTE EDUCATION.	7,500.
BAPTIST HEALTH FOUNDATION 841 PRUDENTIAL DR #1300 JACKSONVILLE, FL 32207		NON PROFIT CHARITY	TO FUND MEDICAL EDUCATION IN FLORIDA	20,000.
THE IMMIGRATION PARTNERSHIP & COALITION FUND 2800 BISCAYNE BLVD, SUITE 200 MIAMI, FL 33137		PUBLIC CHARITY	TO AMPLIFY THE POWER OF IMMIGRANT COMMUNITIES, DEFENDING AND PROTECTING BASIC HUMAN RIGHTS	10,000.
PARKINSON'S FOUNDATION 200 SE 1ST ST #800 MIAMI, FL 33131		NON PROFIT CHARITY	TO FUND MEDICAL EDUCATION IN FLORIDA	2,500.
STONEWALL NATIONAL MUSEUM & ARCHIVES 1300 E SUNRISE BLVD FORT LAUDERDALE, FL 33304		PUBLIC CHARITY	TO PRESERVE AND SHARE THE LGBT HISTORY, CIVIL RIGHTS, ART AND CULTURE	1,000.
AMIABLE INC 3809 HARTNETT BLVD ISLE OF PALMS, SC 29451		NON PROFIT CHARITY	TO FUND RELIGIOUS ACTIVITIES	2,500.
ANTI-DEFAMATION LEAGUE 5295 TOWN CENTER RD #300 BOCA RATON, FL 33486		RELIGIOUS ORGANIZATION	TO HELP SCHOOL AND COMMUNITY OVERCOME A CULTURE OF HATE.	2,500.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
DADE HERITAGE TRUST 190 SE 12TH TERRACE MIAMI, FL 33131		NON PROFIT CHARITY	TO PRESERVE MIAMI-DADE COUNTY'S ARCHITECTURAL, ENVIRONMENTAL, AND CULTURAL HERITAGE	2,000.
LEAGUE AGAINST CANCER 2180 SW 12TH AVE MIAMI, FL 33129		MEDICAL ORGANIZATION	TO HELP CANCER TREATMENT CENTER IN MIAMI, FLORIDA	5,000.
MIAMI VETERINARY FOUNDATION 11622 N KENDALL DR MIAMI, FL 33176		NON PROFIT CHARITY	TO CREATE A BETTER QUALITY OF LIFE FOR PETS	1,000.
PAVE CENTER 3275 CRYSTAL CT MIAMI, FL 33133		NON PROFIT CHARITY	TO FUND RESEARCH AND DEVELOPMENT	7,500.
REPORTERS COMMITTEE FOR FREEDOM OF THE PRESS 1156 15TH ST. NW, SUITE 1020 WASHINGTON, DC 20005		NON PROFIT CHARITY	TO PROVIDE SERVICES AND RESOURCES TO AND ON BEHALF OF JOURNALISTS	1,000.
SINGING PIRATES ASSOCIATION ROBERT MORGAN 18180 S.W. 122 AVENUE MIAMI, FL 33177		EDUCATIONAL ORGANIZATION	TO PROVIDE SERVICES AND RESOURCES TO AND ON BEHALF OF STUDENTS	1,000.
VARIOUS ENTITIES FROM PASSTHROUGHS VARIOUS ADDRESSES MIAMI, FL 33131		NON PROFIT CHARITY	TO PROVIDE ASSISTANCE TO CHARITIES	15,459.
Total from continuation sheets				

Part XV **Supplementary Information**

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - AMERICAN HEART ASSOCIATION

EFFORTS TO REDUCE DEATH CAUSED BY HEART DISEASE AND STROKE. ALSO LEARN ABOUT CARDIOVASCULAR CONDITIONS, ECC AND CPR, DONATING, HEART DISEASE INFORMATION FOR HEALTHCARE PROFESSIONALS, CAREGIVERS, AND EDUCATORS AND HEALTHY LIVING.

NAME OF RECIPIENT - ARSHT CENTER FOUNDATION

TO PROVIDE CONTINUING OPERATING SUPPORT FOR THE ADRIENNE ARSHT CENTER FOR THE PERFORMING ARTS BY RAISING PRIVATE SECTOR CONTRIBUTIONS IN ORDER TO HELP THE CNETER PRESENT HIGH QUALITY PROGRAMMING AND EDUCATIONAL PROGRAMS FOR SOUTH FLORIDA'S DIVERSE COMMUNITY.

NAME OF RECIPIENT - CARE ELEMENTARY SCHOOL

TO PROVIDE A NURTURING CHRISTIAN ENVIRONMENT WHERE CHILDREN FROM THE OVERTOWN COMMUNITY RECEIVE THE BEST OPPORTUNITY FOR ACADEMIC SUCCESS AND CHARACTER DEVELOPMENT.

NAME OF RECIPIENT - CENTER THEATRE GROUP

TO SERVE THE DIVERSE AUDIENCES OF LOS ANGELES BY PRODUCING AND PRESENTING THEATRE OF THE HIGHEST CALIBER, BY NURTURING NEW ARTISTS, BY ATTRACTING NEW AUDIENCES, AND BY DEVELOPING YOUTH OUTREACH AND ARTS EDUCATION PROGRAMS.

NAME OF RECIPIENT - MCCJ, INC

TO URGE EVERYONE TO EXAMINE THEIR CONSCIENCES AND ACT AS RESPONSIBLE CITIZENS IN CONTACTING THEIR ELECTED REPRESENTATIVES IN CONGRESS AND LOCAL POLITICAL OFFICES TO EXPRESS THEIR CONCERNS.

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - MOTHERS AGAINST DRUNK DRIVING

TO END DRUNK DRIVING, HELP FIGHT DRUGGED DRIVING, SUPPORT THE VICTIMS
OF THESE VIOLENT CRIMES, AND PREVENT UNDERAGE DRINKING.

TO END DRUNK DRIVING, HELP FIGHT DRUGGED DRIVING, SUPPORT THE VICTIMS
OF THESE VIOLENT CRIMES, AND PREVENT UNDERAGE DRINKING.

TO END DRUNK DRIVING, HELP FIGHT DRUGGED DRIVING, SUPPORT THE VICTIMS
OF THESE VIOLENT CRIMES, AND PREVENT UNDERAGE DRINKING.

NAME OF RECIPIENT - THE HERALD CHARITIES

THE MIAMI HERALD CHARITIES, INC. IS PRIMARILY INVOLVED IN THE
ACCUMULATION OF FUNDS FOR CHARITABLE AND BENEVOLENT PURPOSES FOR THE
AID OF THE NEEDY OR WORTHY INDIVIDUALS AND NOT FOR PROFIT ORGANIZATIONS
IN THE SOUTH FLORIDA AREA.

NAME OF RECIPIENT - UNIVERSITY OF RICHMOND

TO PROVIDE A COLLABORATIVE LEARNING AND RESEARCH ENVIRONMENT UNLIKE ANY
OTHER IN HIGHER EDUCATION OFFERING STUDENTS AN EXTRAORDINARY
COMBINATION OF THE LIBERAL ARTS WITH LAW, BUSINESS, LEADERSHIP STUDIES,
AND CONTINUING EDUCATION.

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
		14	5,297,853.	
		18	27,756,336.	
525990	-17,025.			
		14	1,633,634.	
	-17,025.		34,687,823.	0.
			13	34,670,798.

[illegible]

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

- | | | | | |
|----|--|-------|-----|----|
| 1. | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)(3) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | Yes | No |
| | | | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | | |
| | (1) Cash | 1a(1) | | X |
| | (2) Other assets | 1a(2) | | X |
| b | Other transactions: | | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | | X |
| | (4) Reimbursement arrangements | 1b(4) | | X |
| | (5) Loans or loan guarantees | 1b(5) | | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

Signature of officer or trustee: [Signature] Date: 11/1/21 Title: TRUSTEE

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	FRANZ CAPRARO	<i>Franz Caprar</i>	01/08/21		P01206919
	Firm's name ▶ GLSC & COMPANY			Firm's EIN ▶ 20-3157326	
	Firm's address ▶ 6303 BLUE LAGOON DRIVE, SUITE 200 MIAMI, FL 33126			Phone no. 305-373-0123	

Form **990-PF** (2019)

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
BLUE WOLF	92,736.	0.	92,736.	92,736.		
BROWN CAPITAL	42,682.	0.	42,682.	42,682.		
CARVAL INVESTORS	345,663.	0.	345,663.	345,663.		
CD&R FUND	72,079.	0.	72,079.	72,079.		
CEVIAN CAPITAL II	312,817.	0.	312,817.	312,817.		
CHAMPLAIN	149,991.	0.	149,991.	149,991.		
DENHAM COMMODITIES	13,958.	0.	13,958.	13,958.		
ECOSYSTEM						
INTEGRITY	25,844.	0.	25,844.	25,844.		
EDGBASTON ASIAN						
EQUITY TRUST	540,188.	0.	540,188.	540,188.		
FORESTER PARTNERS	46,414.	0.	46,414.	46,414.		
GENERATION IM						
GLOBAL	282,219.	0.	282,219.	282,219.		
GENERATION MAF						
GLOBAL	45,740.	0.	45,740.	45,740.		
JP MORGAN	2.	0.	2.	2.		
JUNIPER CAPITAL II						
LP	4,652.	0.	4,652.	4,652.		
MARATHON-LONDON	4.	0.	4.	4.		
MASON CAPITAL	13.	0.	13.	13.		
MVC PRIVATE EQUITY						
FUND	22,927.	0.	22,927.	22,927.		
NEUBERGER BERMAN	3.	0.	3.	3.		
NORTHERN TRUST	1,612,550.	0.	1,612,550.	1,612,550.		
NT GAMCO	8,990.	0.	8,990.	8,990.		
QUINTANA ENERGY	296.	0.	296.	296.		
RAM REALTY						
PARTNERS II, LLC	1.	0.	1.	1.		
RIALTO CAPITAL	288,553.	0.	288,553.	288,553.		
ROCKET CAPITAL						
PARTNERS	3,011.	0.	3,011.	3,011.		
SANDLER CAPITAL						
PARTNERS V	27,137.	0.	27,137.	27,137.		
SG GROWTH PARTNERS	9,092.	0.	9,092.	9,092.		
SILCHESTER						
INTERNATIONAL	1,140,591.	0.	1,140,591.	1,140,591.		
SWALLOW HOPKINS	259.	0.	259.	259.		
THE COLCHESTER						
GLOBAL BOND FUND	123,843.	0.	123,843.	123,843.		
TIFF PRIVATE						
EQUITY	14,179.	0.	14,179.	14,179.		
TIFF SECONDARY	533.	0.	533.	533.		
UBS	114.	0.	114.	114.		
WF VANGUARD	2.	0.	2.	2.		
WP GLOBAL GROWTH	274.	0.	274.	274.		

WP XI PARTNERS	70,496.	0.	70,496.	70,496.
TO PART I, LINE 4	5,297,853.	0.	5,297,853.	5,297,853.

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INCOME/LOSSES 990-T	-17,025.	0.	
OTHER INCOME	1,633,634.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	1,616,609.	0.	

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	273,376.	182,251.		91,125.
TO FM 990-PF, PG 1, LN 16A	273,376.	182,251.		91,125.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	50,000.	33,333.		16,667.
TO FORM 990-PF, PG 1, LN 16B	50,000.	33,333.		16,667.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT AND CUSTODY FEES	3,155,691.	2,208,984.		946,707.	
TO FORM 990-PF, PG 1, LN 16C	3,155,691.	2,208,984.		946,707.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES PAID	183,003.	183,003.		0.	
FEDERAL EXCISE TAX	226,889.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	409,892.	183,003.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INSURANCE	2,420.	1,613.		807.	
PENALTIES	12,985.	0.		0.	
OTHER TAXES	115.	104.		11.	
TO FORM 990-PF, PG 1, LN 23	15,520.	1,717.		818.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
DESCRIPTION		AMOUNT	
MARK TO MARKET ADJUSTMENT FOR BALANCE SHEET PURPOSES (NO TAX EFFECT)		10,730,240.	
TOTAL TO FORM 990-PF, PART III, LINE 3		10,730,240.	

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	9
DESCRIPTION		AMOUNT	
NON-DEDUCTIBLE EXPENSES/NON-TAXABLE INCOME FROM PARTNERSHIPS		381,571.	
PRIOR PERIOD ADJUSTMENT		1,375.	
TOTAL TO FORM 990-PF, PART III, LINE 5		382,946.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	10
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
INVESTMENT IN SECURITIES	48,582,427.	71,014,265.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	48,582,427.	71,014,265.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN PARTNERSHIPS	FMV	173,710,912.	165,403,993.
TOTAL TO FORM 990-PF, PART II, LINE 13		173,710,912.	165,403,993.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	12
DESCRIPTION	BOY AMOUNT	EOY AMOUNT	
LINE OF CREDIT - NORTHERN TRUST BANK	2,500,000.	0.	
TOTAL TO FORM 990-PF, PART II, LINE 22	2,500,000.	0.	

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	13
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
LOUIS WOLFSON III 98 S.E. 7TH STREET, SUITE 1100 MIAMI, FL 33131	TRUSTEE 20.00	0.	0.	0.
MITCHELL WOLFSON JR 98 S.E. 7TH STREET, SUITE 1100 MIAMI, FL 33131	TRUSTEE 15.00	0.	0.	0.
JERI LOUISE WAXENBERG WOLFSON 98 S.E. 7TH STREET, SUITE 1100 MIAMI, FL 33131	TRUSTEE 15.00	0.	0.	0.
JOSEPH T. NATOLI 60 EDGEWATER DRIVE, APT 9G CORAL GABLES, FL 33133	TRUSTEE 15.00	0.	0.	0.
LYNDA WOLFSON FADEL 1018 SUMMIT DRIVE BEVERLY HILLS, CA 90210	TRUSTEE 15.00	0.	0.	0.
AMITA K. SCHULTES 100 W. 89TH STREET, PH 2 NEW YORK, NY 10024	TRUSTEE 15.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.