94 Received in

Form **990-PF** 

**Return of Private Foundation** 

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

Do not enter social security numbers on this form as it may be made public. 2003

2019

	Depar Intern	tment of the Ti al Revenue Sei	reasury	► Go to ww	/w.irs.gov	/Form990PF for in	structions and	the latest inf	ormation. 2000	Open to Public Inspection
			r 2019 or tax ye	ar beginning A	PR 1,	2019	, and e	ending	MAR 31, 202	0
	Nan	ne of founda	tion	,					A Employer identificati	on number
	$\overline{}$			RITABLE TRU				<del></del>	58-619520	9
			•	r if mail is not delivered to st		•		Room/suite	B Telephone number	0101
				ROAD, N.W			<del></del>	<u> </u>	(404)262-	
	_	or town, sta TLANTA		ountry, and ZIP or foreig	ın postal d	ode			C If exemption application is	s pending, check here
	G C	heck all that	apply:	Initial return Final return		Initial return of a	· ·	charity	D 1. Foreign organization	ons, check here
				Address change		Name change		<del></del>	Foreign organizations check here and attach	meeting the 85% test, computation
03	H_C		organization: 947(a)(1) nonexe	Section 501(c)(3		private foundation taxable private four	dation	04	E If private foundation s under section 507(b)	
04	I Fa	ır market val	ue of all assets a	tend of year   J   Accor	unting me	thod: X Cash	Acc	rual	F If the foundation is in	
	•		ol. (c), line 16)		Other (s				under section 507(b)	(1)(B), check here
	┻			0,140. (Part I, co	olumn (d),	must be on cash b	asis.)	_		<del></del>
	Pa	The to	sis of Revenue a tal of amounts in co sarily equal the amou	lumns (b), (c), and (d) may no	ot e:	a) Revenue and xpenses per books		nvestment ome	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
		1 Contrib	outions, gifts, gra	nts, etc., received		114,899			N/A	
		2 Check	of the founda	bon is not required to attach Sch. 8						1
		3 Interest	on savings and tem restments	porary		90		90.		STATEMENT 1
		4 Divider	nds and interest f	rom securities		84,401	. 8	34,401.		STATEMENT 2
		5a Gross	rents							
		<b>b</b> Net rent	al income or (loss)			,				
	a			of assets not on line 10		- 4,068	CEIVE			
	Ď	b Gross s	ales price for all on line 6a	454,791	<u>.</u>					
	Revenue	7 Capital	gain net income (froi	m Part IV, line 2)		181,	2 9 20	20 190.		
	ď	8 Net sh	ort-term capital g	ain 👢		[5] AI	20 20	SS		
7070	?		e modifications	<i>D</i>				مند لمحصيب		
7	1	10a Gross s	ales less returns wances			0	GUEN,			
17		<b>b</b> Less C	ost of goods sold			<u></u>				
AUG	,	c Gross	profit or (loss)							
AU		11 Other i	ncome			27,143	. 2	27,143.	,[	STATEMENT 3
		12 Total.	Add lines 1 throu	igh 11		222,465	. 11	1,634.	,	
5 و		13 Comper	nsation of officers, d	rectors, trustees, etc		0	•	0.		0.
ed in Ogden	,	14 Other e	employee salaries	and wages						
	, .	15 Pensio	n plans, employe	e benefits						
21 Received in Batching Ogden	Expenses	16a Legal f		STMT 4		5,535		0.		5,535.
æ 33	en	b Accou	ntıng fees	STMT 5		11,000	•	8,250.		2,750.
72	Ex	<b>c</b> Other p	professional fees	STMT 6		16,000	. 1	L6,000.		0.
		17 Interes	t							
	Administrative	18 Taxes		STMT 7		3,567		3,567.	,	0.
	ist	19 Depred	ation and deplet	ion			_			
60	Ē	20 Occupa	ancy							
ŏ			conferences, an	d meetings						
≫	and	22 Printin	g and publication	ıs						
SCANNED OCT	10		expenses	STMT 8		99		29	,	70.
<b>Z</b> :	. <u>-</u> = :	24 Total o	perating and ad							
	ber	expen	ses. Add lines 13			36,201	2	27,846	,	8,355.
<u> </u>	ō	25 Contrib	outions, gifts, gra			208,746	•			8,355. 208,746.
OC			expenses and dis							
<del>-</del> -I			es 24 and 25			244,947	. 2	27,846.		217,101.
0			ct line 26 from lii	ne 12:	Ì					
6				enses and disbursements		-22,482				
20			-	(if negative, enter -0-)			8	33,788.		
0 6 2020				negative, enter -0-)					N/A	
		- / (0]401	("					_		5 000 DE (0040)

FOr	m 99	0-PF (2019) THE BERMAN CHARTTABLE T	RUST		6195209 Page 2
P	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	<u></u>
<u>-</u>	ui t	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	33,356.	144,320.	144,320.
	3	Accounts receivable			
		Less: allowance for doubtful accounts			
	4	Pledges receivable ►			<b>~-</b> ~ · · · ·
		Less: allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons			
	7	Other notes and toans receivable			
	'	Less; allowance for doubtful accounts	•	•	
s	8	Inventories for sale or use			
Assets	_	Prepaid expenses and deferred charges			
As		Investments - U.S. and state government obligations			
	Į.	Investments - corporate stock STMT 9	3,102,456.	2,914,269.	2,902,770.
		Investments - corporate bonds	0,202,2000		- /
		Investments - land, buildings, and equipment basis			
	l''	Less accumulated depreciation		-	•
	12	Investments - mortgage loans			
	13	Investments - other STMT 10	500,000.	500,000.	363,050.
	1	Land, buildings, and equipment basis	300,000.		303,030
	14	Less accumulated depreciation			
	15	Other assets (describe		-	
	i .	Total assets (to be completed by all filers - see the	-		
	10	Instructions. Also, see page 1, item I)	3,635,812.	3,558,589.	3,410,140.
	47		3,033,012.	3,330,303.	3,410,140.
	ı	Accounts payable and accrued expenses			
	18	Grants payable			
ties	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
Lia	21	Mortgages and other notes payable			
	22	Other liabilities (describe			Thinapi
		Taket tick titates (add lines 17 through 22)	. 0.	0.	
_	23	Total liabilities (add lines 17 through 22)			
s		Foundations that follow FASB ASC 958, check here			$\epsilon$
Š	0.4	and complete lines 24, 25, 29, and 30.  Net assets without donor restrictions			
Ē	24	Net assets with donor restrictions			
Net Assets or Fund Balance	25	Foundations that do not follow FASB ASC 958, check here			
Ę					
Ē	200	and complete lines 26 through 30.	3,635,812.	3,558,589.	
S	26	Capital stock, trust principal, or current funds  Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
set	27	Retained earnings, accumulated income, endowment, or other funds	0.	0.	
As	28	_	3,635,812.	3,558,589.	
Š	29	Total net assets or fund balances	3,033,012.		** *** *** *** ***
		Tabel link listen and not accept the not belonge	3,635,812.	3,558,589.	
=	30	Total liabilities and net assets/fund balances		3,330,303.	
P	art	III Analysis of Changes in Net Assets or Fund B	alances		
1	Tota	net assets or fund balances at beginning of year - Part II, column (a), line	29		· · · · · · · · · · · · · · · · · · ·
		st agree with end-of-year figure reported on prior year's return)		1	3,635,812.
	•	r amount from Part I, line 27a		2	-22,482.
		r increases not included in line 2 (itemize)		3	0.
		lines 1, 2, and 3		4	3,613,330.
		eases not included in line 2 (itemize)  BOOK TAX DIFFE	RENCE ON DONA		54,741.
		net assets or fund balances at end of year (line 4 minus line 5) - Part II, co		6	3,558,589.
<u>~</u>		2000 or range satisfaces at one of your time a time of ( diffit of	\-\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\	<u>-</u> -	Form <b>990-PF</b> (2019)

P	art IV Capital Gains	and Lo	sses for Tax on In	vestment	Income						
			of property sold (for exar or common stock, 200 shs		е,	( <b>b</b> )	How ac - Purc - Don:	cquired hase ation	(c) Date (mo., c	acquired lay, yr.)	(d) Date sold (mo., day, yr.)
<u>1a</u>						ļ			_		
<u>b</u>	SEE ATTACHED	STAT	PEMENTS			_				_	
<u>C</u>		<del></del>				-					
<u>d</u>				<del></del> .		-					
<u>e</u>		(6) D	annountion allowed	(=) Coo	t or other basis				(b) G	ain or (loss	\\
_	(e) Gross sales price	(1)	epreciation allowed (or allowable)		t or other basis xpense of sale					s (f) minus	
<u>a</u>								<u> </u>			<del></del>
<u>b</u>			····								
<u>c</u>										-	
e	454,791.				459,02	3.					-4,068.
<u> </u>	Complete only for assets showing	ng gain in d	column (h) and owned by t	the foundation					I) Gains ((	Col. (h) gain	
			i) Adjusted basis		cess of col. (I)				l. (k), but	not leśs tha	n -0-) <b>or</b>
	(i) FMV as of 12/31/69		as of 12/31/69		col. (j), if any				Losses	(from col. (	(n))
a											
b											
C											
d											
<u>e</u>									_		<u>-4,068.</u>
2	Capital gain net income or (net ca	apıtal loss)	If gain, also enter			}	2				-4,068.
3	Net short term capital gain or (lo	os) as defir									
	If gain, also enter in Part I, line 8,	•		(0).		]					
	If (loss), enter -0- in Part I, line 8					لب	3	<u> </u>		N/A	· <u> </u>
			ection 4940(e) for				_	nent in	come		
(Fo	r optional use by domestic private	e foundatio	ins subject to the section 4	1910(а) tах ол	not investment ir	ncome	0)				
If s	ection 4940(d)(2) applies, leave t	his part bla	ınk.								
											Yes X No
	s the foundation liable for the sec				•	riody					Yes A No
_	(es," the foundation doesn't qualit Enter the appropriate amount in					ntries	<del></del>				
<u>-</u>	(a)	oacii coluii		istructions ben	oro making any c					·	(d)
(	Base period years Calendar year (or tax year beginni	no in)	(b) Adjusted qualifying dist	tributions	Net value of no	(c) Incha		-use assets	;	Distril	(d) oution ratio vided by col. (c))
_	2018	''ig ''')		6,353.		3	. 91	4,82	7.	(00). (0) 01.	.050156
	2017			6,949.				2,64			.041919
	2016			8,475.	·-			7,15			.039484
	2015			1,500.				5,928			.027846
	2014			5,382.				9,025			.057521
					<del></del>						
2	Total of line 1, column (d)								2		.216926
	Average distribution ratio for the	5-year bas	e period - divide the total c	on lino 2 by 5.0	), or by the numb	er of	years				
	the foundation has been in existe	nce if less	than 5 years						3		.043385
4	Enter the net value of noncharitat	ole-use ass	ets for 2019 from Part X,	line 5					4		4,019,970.
5	Multiply line 4 by line 3								5	<u> </u>	<u>174,406.</u>
6	Enter 1% of net investment incon	ne (1% of	Part I, line 27b)						6	<u> </u>	838.
									1		<u> </u>
7	Add lines 5 and 6								7		175,244.
8	Enter qualifying distributions fron	n Part XII	line 4						8		217,101.
	If line 8 is equal to or greater than See the Part VI instructions.			1b, and comp	lete that part usir	ng a 1	% tax	rate.	<u> </u>		

Part IV   Capital Gains and Los	Ses for Tax on Investment Income	56-61	33203	PAGE I OF I
oupline and acc		d a a soal antata	(b) How aco	uired (c) Date acquired (d) Date sold
(a) List and 2-story bri	describe the kind(s) of property solo	o, e.g., real estate, no shs. MI C Co.	P - Purcha D - Donat	ase (mo., day, yr.) (mo., day, yr.)
				VARIOUS 03/13/20
1a 4,107.3461 SHS				
		VANGUARD SMALL-		VARIOUS 02/14/20 12/10/1502/14/20
		S VANGUARD SMALL		
		GUARD MID-CAP ET		VARIOUS 01/30/20
		S VANGUARD SMALL		VARIOUS 01/30/20
f 148 SHS ISHARES			P P	VARIOUS 12/23/19
<del></del>		TL STOCK INDEX F		VARIOUS 09/26/19
		ALTERNATIVE FUN		02/08/1909/24/19
1 37 SHS VANGUARI			P	VARIOUS 06/26/19
		O SER TORTOISE N		VARIOUS 03/13/20
		VANGUARD SMALL-		VARIOUS 02/14/20
		TL STOCK INDEX F		VARIOUS 09/26/19
m 92.018 SHS AQR				12/20/18/07/09/19
n WASH SALE - VAI		L STOCK INDEX FD	ET P	VARIOUS 09/26/19
o CAPITAL GAINS I	DIVIDENDS			
(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)
50 961	(UI dilowaule)	93,028.		-34,167.
a 58,861. b 53,679.		39,429.		14,250.
		72,196.		25,938.
c 98,134.		27,894.		12,209.
d 40,103.		22,548.		6,071.
e 28,619.		15,956.		10,057.
f 26,013.		9,505.	·	-776.
g 8,729. h 81,510.		100,015.		-18,505.
		5,348.		742.
6,090.		55,451.		-21,633.
33,818.		3,754.		86.
k 3,840.				-280.
12,788.		13,068.		
m 789.		831.		<u>-42.</u>
<u>n</u>				164.
0 1,818.	(1)	h for a data a sa 10/01/00		1,818.
Complete only for assets showin	g gain in column (h) and owned by t			I) Losses (from col. (h)) cess of col. (h) gain over col. (k),
(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		but not less than "-0-")
	as 01 12/3 1/09	Over coi. (j), it ally		·
<u>a</u>				-34,167. 14,250.
b				14,230.
C				25,938.
d				12,209.
е				6,071.
f				10,057.
9				<u>-776.</u>
h				-18,505.
1		_		742.
1				-21,633.
k	.,			86.
1				-280.
m				-42.
n			·	164.
0				1,818.
2 Capital gain net income or (net cap	pital loss) { If gain, also enter "-0	In Part I, line 7	2	-4,068.
3 Net short term capital gain or (los		, I		
If gain, also enter in Part I, line 8, If (loss), enter "-0-" in Part I, line 8	column (c).	}	3	N/A

	$\mathcal{I}$				,	
Form	1 990-PF (2019) THE BERMAN CHARITABLE TRUST	5	8-619	5200	p	age 4
	irt'VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 494	Θ(e), or 49	48 - see	instru	ction	
	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1.	)				
14	Date of ruling or determination letter: (attach copy of letter if necessary-see instructions	a				•
h	Domestic foundations that meet the section 4940(e) requirements in Part V, check here   X and enter 1%	"	1 -	-	81	38.
•	of Part I, line 27b		<del>-   -</del>	_	<u>.</u>	<del></del>
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (	b)				
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	′ ′	2			o.
	Add lines 1 and 2		3		83	38.
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		83	38.
6	Credits/Payments:				_	
a	2019 estimated tax payments and 2018 overpayment credited to 2019 6a	8,409.				
b	Exempt foreign organizations - tax withheld at source	0.				
C	Tax paid with application for extension of time to file (Form 8868)	0.	- 1			
d	Backup withholding erroneously withheld 6d 6d	0.				
7	Total credits and payments. Add lines 6a through 6d	_	7		8,40	9.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <b>X</b> if Form 2220 is attached	<u>_</u>	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		7,57	
	Enter the amount of line 10 to be: Credited to 2020 estimated tax  7,571. R  Int VII-A   Statements Regarding Activities	efunded 🛌	11			0.
		or intervene in		7	Yes	No
Id	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participat any political campaign?	s of intervene in			103	X
h	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instruction	s for the definiti	nn	1a 1b	<del></del>	X
U	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published		UII	<u>                                   </u>	<del>-  </del>	<u> </u>
	distributed by the foundation in connection with the activities.	u 01				
c	Did the foundation file Form 1120-POL for this year?			1c		X
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			"		
Ī	(1) On the foundation. ▶ \$ \$ \$	0.				
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on fou			· ·		
_	managers. ► \$ 0.				İ	
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2	_	X
	If "Yes," attach a detailed description of the activities.					
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of in	corporation, or				
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes			3		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?			4a		X
þ	If "Yes," has it filed a tax return on Form 990-T for this year?		N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?			5		<u>X</u> _
	If "Yes," attach the statement required by General Instruction T.			1 1		
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:					•
	By language in the governing instrument, or			1 1		
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict	with the state la	ıw			
	remain in the governing instrument?			6	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		7	X	
82	Enter the states to which the foundation reports or with which it is registered. See instructions.				. 1	
	GA					
þ	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or design	nate)				
	of each state as required by General Instruction G? If "No," attach explanation			8b	$\mathbf{x}$	

Form **990-PF** (2019)

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

\_10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

1. At any time during the year, did the foundation, directly or indirectly, own a controlled arithy within the miniming of section \$12(0) (13)? If Yes, attach schedule, See instructions	Pa	rt VII-A Statements Regarding Activities (continued)			
section 512(b)(13)? If Yes, attach schedule. See instructions If Yes, attach statement. See instructions If Yes attach statement. See instructions in Yes Instructions Instructions or exception application and into the tome unit not an exception application or exception application or exceptions and fining requirements for Finick Form 114. If Yes, enter the name of the foreign country.  If Yes Instructions If Yes attached in the Yes' column, unless an exception application.  If Yes Instructions Instructions Instructions Instruction Instructio				Yes	No
12 In the foundation make a instinctution to a dinori advesed fuel over which the foundation or a disqualified person had advisory privileges?  13 Did the foundation comply with the guidic inspection requirements for its annual returns and exemption application?  15 In the foundation comply with the guidic inspection requirements for its annual returns and exemption application?  16 The books are in one of I STEPHEN M. BERMAN Telephone no. \$\Quad 4.02.56.9.9469\$  17 Located at \$\Zeta 2.66.0 PEACHTREE RID., N.W. UNIT 2.0A, ATLANTA, GA  18 A The books are in one of I STEPHEN M. BERMAN Telephone no. \$\Zeta 0.40.2.56.9.9469\$  18 Section 4947(91) in onesempt charable trusts lining from 90-PF in les of From 1941 - check here and enter the amount of fax-exempt interest received or accrued during the year  16 A ray firm demand packader year 2019, did the foundation have an interest in or a cignitative or other authority over a bank, securities, or other financial account in a foreign country?  16 A ray firm demand packader year 2019, did the foundation have an interest in or a cignitative or other authority over a bank, securities, or other financial account in a foreign country?  18 Peart VII-B   Statements Regarding Activities for Which Form 4720 May Be Required  19 Financial and the case or exchange, or because it is a foreign and the financial account in a foreign country.  19 Formsh goods, services, or accidence to the "Yes" column, unless an exception applies.  10 Lining the year, did the foundation (either directly or indirectly):  10 Lining the year, did the foundation (either directly or indirectly):  11 Gingage in the case or exchange, or because the package of the packa	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
it Yes, attach statement. See instructions  10. Dut he foundation comply with the public inspection requirements for its annual returns and exemption application?  11. Website address ▶ N/A  11. The books are in care of ▶ STEPHEN M. BERMAN  12. The books are in care of ▶ STEPHEN M. BERMAN  13. X  14. The books are in care of ▶ STEPHEN M. BERMAN  15. Section 4947(a)(1) nonexempt characteristic trusts fising form 999 Pri in leve of Form 1041 - check here and enter the manual not flox-owaging interiorst received or accreted unity by ear  16. Alony time during calendar year 2016, did the foundation have an interior in or a signature or other authority over a bank, securities, or other innarical account in a foreign country?  16. Alony time during calendar year 2016, did the foundation have an interior in or a signature or other authority over a bank, securities, or other innarical account in a foreign country?  16. 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.  19. During the year, did the foundation (letter directly or indirectly):  (1) Engage in the cale or exchange, or locating of property with a disqualified person?  (2) Berore money from, lend money to, or otherwise evend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay cumperishor to, or pay or reimburse the experises of, a disqualified person?  (5) Transfer any income or assest to a disqualified person, or make any of either available for the benefit or use of a disqualified person, or make any of either available for the benefit or use of a disqualified person, or make any of either available or the money to or, entering the second person (or make any of either available or the money to or, property to a government service, it terminating within 90 dispus.)  19. If any service to a service of the service the service of the service of the servic		section 512(b)(13)? If "Yes," attach schedule. See instructions	11		_X_
13   Dut the foundation comply with the public inspaction requirements for its annual returns and exemption application?   13   X   Webste address   N/A	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
Website address ► N/A  17 The books art in care of ► STEPHEN M. BERMAN  Telephone no. ► 40.4 - 25.6 - 94.69  18 Atom books art in care of ► STEPHEN M. BERMAN  Telephone no. ► 40.4 - 25.6 - 94.69  18 Atom books are in care of ► STEPHEN M. BERMAN  Telephone no. ► 40.4 - 25.6 - 94.69  18 Atom books are in care of ► STEPHEN M. BERMAN  Telephone no. ► 40.4 - 25.6 - 94.69  The All Description of the Common of			12		_X_
14 The books are in care of ▶ STEPHEN M. BERMAN    Located at ▶ 2660 PEACHTREE RD. N. W. UNIT 20A, ATLANTA, GA   2IP-4 ▶ 303050   15 Section 497(a)(1) onexempt charitable trusts filing Form 990-Filin live of Form 1041 - Check here   and enter the amount of tax-exempt interest received or accrued during the year   A tray three during clandra year 2016, did the foundation have an interest in or a cignature or other authority over a bank,   securities, or other financial account in a foreign country?   See the instructions for exceptions and filing regular grey entermits for FinCEN Form 114. If Yes, enter the name of the   foreign country   Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required   File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.   1a During the year, did the foundation (either directly or indirectly);   1 Engage in the case or exchange, or iscange of property with a disqualified person?   2) Biorrow money from, lend money to, or otherwise extend credit to (or accept it from)   a disqualided person?   Yes   X   No     3) Firmsh goods, services, or facilities to (or accept them from) at disqualified person?   Yes   X   No     4) Pay compensation to, or pay or remburse tile expenses of, a disqualified person?   Yes   X   No     5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?   Yes   X   No     6) Agree to bey money or property to a government officia? (Exception, Check 'No'   the foundation appear to make a grant to or to employ the official for a period after termination of powerment survey. I state grey money or property to a government officia? (Exception, Check 'No'   the foundation engage in a prior year in any of the acts fall to qualify under the exceptions described in Regulations section 33.4941(6)-3 or in a current olicite regarding disaster assistance, check here   Ves   X   No     the foundation engage in a prior year in any of the a	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	<u> X</u>	L
Located at N 2650 PEACHTREE RD., N.W. UNIT 20A, ATLANTA, GA  ZIP-4 >30305  Section 4947(a)(1) nonexempt charable trusts filing form 930-PF in leve of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year  16. At any time during calcularly 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.  Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 if any term is checked in the "Yes" column, unless an exception applies.  1a During the year, did the foundation (lether directly or ordirectly);  (1) Engage in the sale or exchange, or leasing of proporty with a dicqualified person?  (2) Borrow money from, lend money to, or otherwise evend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or fachities to (or accept them from) a disqualified person?  (4) Pay complexisation to, or pay or rembinise the expenses of, a disqualified person?  (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 (or make any of either available for the tenth or use of a disqualified person (or make any of either available for the person or assets to a disqualified person (or make any of either available for the person or assets to a disqualified person (or make any of either available for the person or assets to a disqualified person (or make any of either available for the person or assets to a disqualified person (or make any of either available for a period after termination of government service, if terminating within 90 disps.)  1) If any answer is "Yes" to 1(1)-(6), did any of the acid section disps.  1) If the foundation engage in a prior year any of the acid sectioned in 18, other than excepted ac					
15 Section 4947(a)(1) nonexempt charatable trusts filing Form 390-PF in lieu of Form 1041 - check here and once the amount of tax-except intercet recoved or accrued during the year 16. At any time during calondar year 2019, did the foundation have an intercet 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.  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.  1 During the year, did the foundation (either directly or indirectly):  (1) Engage in the sale or oxcharge, or incaring of property with a dequalified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)  a disqualified person?  (3) Furnesh joods, services, or facilities to (or accept them from) a disqualified person?  (4) Pey compensation to, or pay or remition use the expenses of, a disqualified person?  (5) Transfer any incomer or assets to adequalified person (or make any of either available for the benefit or use of a disqualified person)?  (6) Agrie to pay morey or property to a povernment official? (Exception, Check 'No' if the foundation argeed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)  If any a saver is '78's to 14(1)-(6), did any of the acts facts fold in 18, other than exception 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? See instructions  Organizations relying on a current notice regarding disaster assistance? See instructions  If yes, list the eyear's  A the end of tax year's 20-13, did the foundation have any undistributed mome? (If applying section 4942(a)(2) (	14			<u>469</u>	
and enter the amount of thor-exempt interest received or accured during the year  8 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! ▶  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.  1 During the year, did the foundation (either directly or indirectly):  (1) Engage in the such one or exchange, or loadings of property with a dequalified person?  2) Borrow money from, lend money to, or otherwise veriend credit to (or accept it from)  a disqualified person?  3) Furnish poods, services, or facilities to (or accept them from) a disqualified person?  4) Pay cumpensation to, or pay or reimburse the expenses of, a disqualified person?  4) Pay cumpensation to, or pay or reimburse the expenses of, a disqualified person?  5) If any shoots or a sease to a disqualified person (or make any of either available for the benefit or use of a desqualified person (or make any of either available for the benefit or use of a desqualified person (or make any of either available for the benefit or use of a desqualified person (or make any of either available for the benefit or use of a desqualified person (or make any of either available for the foreign of a despending person (exception of the despending of the available of the benefit or use of a desqualified person (or benefit or see of a desqualified person (or to employ the official for a period after termination of government service, if terminating within 90 days.)  5) If any answer is "Ses" to 1a(1)-(5), did any of the acts fall to qualify under the exceptions described in Regulations section 542(16) and the foundation have any undistributed more described in a contractive to distribute income			305		<del></del>
Nature   International calendary year 2019, and the foundation have an interect in or a cignature or other authority over a bank, securiaes, or other financial account in a foreign country?	15			/₃►	ــــا
securities, or other financial account in a foreign country?  See the instructions for exceptions and filting requirements for FinCEN Form 114. It "Yes," enter the name of the foreign country.  Part VII-B.   Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1 a During the year, did the foundation (either directly or indirectly):  (1) Engage in the cale or exchange, or loading of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)  a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or remibiuse the expenses of, a disqualified person?  (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)?  (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.)  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 3.4941(d)-3 or in a current notice regarding disaster assistance, check here  C bid the foundation engage in a prior year in 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, check here  C bid the foundation engage in a prior year in 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, check here  C bid the foundation engage in a prior year in 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, check h		,	N		NIO
See the instructions for exceptions and filling requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1a During the year, did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or locaning of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a given to or to employ the official for a period after termination of government service, if terminating within 90 days.)  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(6)-3 or in a current notice regarding disaster assistance, check here  C Did the foundation engage in a pinor 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?  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(in) 4942(i	16		16	162	-
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 saile or exchange, or issaining of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise e-tend credit to (or accept it from) a disqualified person?  (3) Furnish poods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay currupersalcium to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  (b) If any answer is "Yes" to 1a(1)-(6), did any of the acts fall to quality under the exceptions described in Regulations section 53.441(0)-3 or in a current notice regarding disaster assistance? See instructions  Organizations relying on a current notice regarding disaster assistance? See instructions  Organizations relying on a current notice regarding disaster assistance? See instructions  Organizations relying on a current notice regarding disaster assistance? See instructions  Organizations relying on a current notice regarding disaster assistance? See instructions  Organizations relying on a current notice regarding disaster assistance? See instructions  Organizations relying on a current notice regarding disaster assistance? See instructions  Organizations relying on a current notice regarding disaster assistance? See instructions  Organizations relying on a current notice regarding disaster assistance? See instructions  Organizations relying to the sex year beginning in 2019?  It was not failure to distribute income (Part XIII, lines  6d and 6e) for tax year(5) seginning before 2019?  If ye			10		<u> </u>
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1 a During the year, did the foundation (either directly or indirectly):  (1) Engage in the cale or exchange, or leading of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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 or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the termination of government service, it termination of users in "Yes" [X] No  1 If any any any any any any of the acts alia to quality under the exceptions described in Regulations  2 Taxs on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(a)(3) or 4942(a)(3) or 4942(a)(3					
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(1) Engage in the calle or exchange, or learing of property with a disequalited person?  (2) Borrow money from, lend money to, or otherwise evend credit to (or accept it from) a disqualited person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay cumpensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation argine to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)  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, check here  c bid 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?  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(0)(3) or 4942(0)(5)):  a At the end of tax year (3) did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019?  if "res," list the years"    b Ar the real my years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (reliating 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).  b If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  b If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  b	1a				$\overline{}$
a disqualified person? Yes X No  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No  (4) Pay complemstation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  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  N/A  Organizations relying on a current notice regarding disaster assistance? See instructions  N/A  Organizations relying on a current notice regarding disaster assistance? See instructions  N/A  Organizations relying on a current notice regarding disaster assistance? See instructions  N/A  Organizations relying on a current notice regarding disaster assistance? See instructions  N/A  Organizations relying on a current notice regarding disaster assistance? See instructions  N/A  Organizations relying on a current notice regarding disaster assistance? See instructions  N/A  1b  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(i)(3) or 4942(i)(5)):  A At the end of tax year Septiming in 2019?  If Yes, its the years \incended Yes X No  If Yes, its the years \incended Yes X No  If Yes, its the years years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (riclating to incorrect valuation of assets) to the year sundistributed income? (If applying section 4942(a)(2) to all years listed, answer No and attach statement - see instructions.)  If Yes, its the years \incen					,
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?					
(4) Pay cumpensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  bif 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  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?  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(i)(3) or 4942(i)(5)):  a At the end of tax year 2019, did the foundation have any undistributed income ("art XIII, lines 6d and 6e) for tax year(s) beginning before 2019?  If "Yes," list the years    b Are there any years Isisted in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect violuation of assets) to the year's undistributed moome? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement" see instructions.)  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years liere.  A Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  A Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year of holdings acquired by gift or bequest; or (3) the lapse of the 10-,					
(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)?  (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.)  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? See instructions  Organizations relying on a current notice regarding disaster assistance, check here  c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?  1c					
for the benefit or use of a disqualified person)?  (6) Agree to pay money or properly 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.)  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(0)-3 or in a current notice regarding disaster assistance? See instructions  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					·
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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.)  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  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?  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(i)(3) or 4942(i)(5)):  a At the end of tax year(2013, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(5) beginning before 2019?  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  If "Yes," dist the years where the instructions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years liere.					
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Organizations relying on a current notice regarding disaster assistance, check here  c. Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?  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(i)(3) or 4942(i)(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(5) beginning before 2019?  If "Yes," list the years   Yes   X No    If "Yes," list the years   Yes   X No    If "Yes," list the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)  If It lie provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.    Yes   X No    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, 1960; (2) the lapse of the 5 year period (or longer period approved by the Commissioner under section 4942(o)(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 bioldings in 2019.)  Ala Did the foundation make any invectment in a prior year (but after December 31, 1960) that could joopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		*=	1b	-	
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?  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(i)(3) or 4942(i)(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?  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 is undistributed income? (If applying section 4942(a)(2) to all years listed, answer "Nu" and attach statement - see instructions.)  If I'll priorisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years liere.  Definition of the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  If Yes, did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1060; (2) the lapse of the 5 year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)  Ab Did the foundation make any invectment in a prior year (but after December 31, 1969) that could peopardize its charitable purposes?  b Did the foundation make any invectment in a prior year (but after December 31, 1969) that could peopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		``			
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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?  If "Yes," list the years \	2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			
6d and 6e) for tax year(s) beginning before 2019?  If "Yes," list the years \( \)		defined in section 4942(j)(3) or 4942(j)(5)):			
If "Yes," list the years	a				٠ ا
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, ariswer "No" and attach statement - see instructions.)  c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.					
valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, ariswer "No" and attach statement - see instructions.)  c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  Job 15 "Yes," did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  Ves X 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  1 Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  b Did the foundation make any invectment 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?					
statement - see instructions.)  c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	D				۱ ۱
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			2h	-	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  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.)  13b  14a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4a X  4b Did the foundation make any invoctment 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?	r	·			
during the year?  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.)  1 A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  2 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?					
during the year?  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.)  1 A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  2 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?	3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
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.)  1					
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.)  1	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			
Schedule C, to determine if the foundation had excess business holdings in 2019.)  A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  A Did the foundation make any invoctment 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?  A Did the foundation make any invoctment 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?					•
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				-	- '
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			3b		<del> </del>
had not been removed from jeopardy before the first day of the tax year beginning in 2019?			4a		<u>X</u>
<u> </u>	b		·	-	
				)-PF	

Form **990-PF** (2019)

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

Form 990-PF (2019) THE BERMAN CHARITABLE TRUST		195209 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter "NO	NE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services  Part IX-A   Summary of Direct Charitable Activities		▶ 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical interpretations and other beneficiaries served, conferences convened, research papers produced,		Expenses
1 N/A		
2		
3		
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		
		0.
Total. Add lines 1 through 3		Form <b>990-PF</b> (2019)

1

Р	art X Minimum Investment Return (All domestic foundations mu	st complete this part.	Foreign four	dations,	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	3,642,16	4.
b	Average of monthly cash balances			1b	38,88	2.
C	Fair market value of all other assets			1c	400,14	2.
đ	Total (add lines 1a, b, and c)			1d	4,081,18	8.
е	Reduction claimed for blockage or other factors reported on lines 1a and					
	1c (attach detailed explanation)	1e	0.	ľ		
2	Acquisition indebtedness applicable to line 1 assets			2	_	0.
3	Subtract line 2 from line 1d			3	4,081,18	8.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, s	ee instructions)	ļ	4	61,21	
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on F	Part V, line 4		5	4,019,97	0.
6	Minimum investment return. Enter 5% of line 5			6	200,99	9.
Р	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and	(j)(5) private operating f	oundations an	d certain		
	foreign organizations, check here   and do not complete this part.)					
1	Minimum investment return from Part X, line 6			1	200,99	9.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	838.			
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b				
C	Add lines 2a and 2b			2c	83	
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	200,16	
4	Recoveries of amounts treated as qualifying distributions			4		0.
5	Add lines 3 and 4			5	200,16	
6	Deduction from distributable amount (see instructions)			6		0.
<u>7_</u>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part X	III, line 1		7	200,16	<u>1.</u>
P	art XII Qualifying Distributions (see instructions)					
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purpo	ses:			017 10	-
a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26			1a	217,10	
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	e, etc., purposes		2		
3	Amounts set aside for specific charitable projects that satisfy the:					
a	7 17 7			3a		
þ	Cash distribution test (attach the required schedule)	_		3b	015 10	_
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and			4	217,10	1.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net invest	ment			**	_
	income. Enter 1% of Part I, line 27b			5	83	
6	Adjusted qualifying distributions. Subtract line 5 from line 4			6	216,26	3.
	Aleks. The amount on two C will be used in Bart V, column (b) in subanguant years wh	on calculating whather th	a foundation o	unalifiae for	the cection	

Form **990-PF** (2019)

4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	<b>(d)</b> 2019
1 Distributable amount for 2019 from Part XI,				
line 7				200,161.
2 Undistributed income, if any, as of the end of 2019			100 000	,
a Enter amount for 2018 only			192,366.	<u> </u>
b Total for prior years:		0.		,
3 Excess distributions carryover, if any, to 2019:		U.		
a From 2014				·
b From 2015				į
c From 2016				
d From 2017				
e From 2018			ì	
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2019 from				
Part XII, line 4: ►\$ 217,101.				
a Applied to 2018, but not more than line 2a			192,366.	
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				24,735.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:		•		
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract	-"			
line 4b from line 2b		0.		·
c Enter the amount of prior years'				
undistributed income for which a notice of				
deficiency has been issued, or on which the section 4942(a) tax has been previously				
assessed		0.	•	
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2018. Subtract line				•
4a from line 2a. Taxable amount - see instr.			0.	· · · · · · · · · · · · · · · · · · ·
f Undistributed income for 2019. Subtract				
lines 4d and 5 from line 1. This amount must				175,426.
be distributed in 2020				1/3,420.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3) (Election	0.			
may be required - see instructions)  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				
		***		Form 990-PF (2010)

923581 12-17-19

Form 990-PF (2019) THE BER	MAN CHARITA	ABLE TRUST	A		.95209 Page
			-A, question 9)	N/A	· · · · · ·
			•		
•			n section	4942(j)(3) or 49	942(1)(5)
		N .			T
_ <b>-</b>		(b) 2018		(d) 2016	(e) Toțal
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a "Assets" alternative test - enter:					
(1) Value of all assets					
(2) Value of assets qualifying		/	1		
under section 4942(j)(3)(B)(i)				<u> </u>	
listed					
c "Support" alternative test - enter:					
(1) Total support other than gross					
512(a)(5)), or royalties)					
(2) Support from general public				`	
section 4942(j)(3)(B)(iii)	/				
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income					
			if the foundation	n had \$5,000 or m	ore in assèts
at any time during t	he year-see inst	ructions.)			
1 Information Regarding Foundation	n Managers:			<del></del>	
	_	than 2% of the total cont	ributions received by the	e foundation before the clo	se of any tax
SEE STATEMENT 12					
	o own 10% or more of t	he stock of a corporation	(or an equally large porti	on of the ownership of a p	partnership or
			, , , , , ,		•
IONE					
	ion, Grant, Gift, Loan	. Scholarship, etc., Pr	ograms:		-
				not accept unsolicited req	uests for funds. If
a The name address and telephone num	her or email address of t	the person to whom applic	cations should be addres	ssed:	
,					
h The form in which applications should be	ne submitted and informa	ation and materials they si	nonly include.	<del></del>	
Park XIV Private Operating Foundations (see instructions and Part VII-A, question 9)  1 a 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 Age of the ruling b Check box to indicate whether the foundation is a private operating foundation described in section  2 a Enter the lesser of the adjusted net income from Part to the minimum investment return from Part to the minimum investment return from Part X for each year listed  5 85% of line 2a  6 Qualifying distributions from Part XII, line 4, for each year listed  6 Amounts included in line 2 not used directly for active conduct of exempt activities  9 Qualifying distributions made directly for active conduct of exempt activities  9 Subtract line 2 for for line 2 co  1 Complete 3a, b, or 6 for the alternative test - enter:  (1) Value of all asserts  (2) Value of assests qualifying under section 4942(j)(3)(B)(i)  1 Endowment "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 atternative 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 atternative test - enter:  (3) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)  (3) Largest amount of support from an exempt organization as provided in section 4942(j)(3)(B)(iii)					
Perr XIV   Private Operating Foundations (see networkstoms and Part VII.4 question 9)  1 at the behavior has received a ladge of determination (gene industrial parts operating foundation, and the radge is effective for 2019, rater the "Day of the radge"  2 a Center the laster of the adjusted not more from Part Xiv   Private   Private					
	e cuch ac hy geography	nal areas, charitable fields	kinds of institutions or	other factors:	
•	s, such as by geographic	ai ai eas, chai liadhe lieids,	ARIUS OF HISHIGHNIS, OF	טנווטו ומטנטוס.	
N/A					
22801 12 17 10			· · · · · · · · · · · · · · · · · · ·		Form 990-PF /20
230U   12-1/-18		10			101111 <b>330 -1 1</b> (20
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4U441 /4/3U7 4443	201	J.UJUJJ THE	DEVINA CHA	WIIWDHE IKO	DI 4447

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3 Grants and Contributions Paid During th	e Year (Continuation)			<del> </del>
Recipient  Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (nome or business)	or substantial contributor	recipient		
TEMPLE SINAI	N/A	PUBLIC	CAPITAL CAMPAIGN	
5645 DUPREE DRIVE, NW ATLANTA, GA 30327			CONTRIBUTION.	25,000
ALDINIA, GA 30027				23,000
THE GALLOWAY SCHOOL	N/A	PUBLIC	ANNUAL CONTRIBUTION.	
215 W WIEUCA ROAD, NW				
ATLANTA, GA 30342				5,000
NOTRE DAME UNIVERSITY	N/A	PUBLIC	BERMAN SCHOLARSHIP	
1100 GRACE HALL NOTRE DAME IN 46556			FUND.	5,000
NOTRE DAME, IN 40550				3,000
ATLANTA JEWISH FILM FESTIVAL	N/A	PUBLIC	ANNUAL CONTRIBUTION.	
1800 PEACHTREE STREET, SUITE 830	, , , , , , , , , , , , , , , , , , ,		THE CONTRIBUTION:	
ATLANTA, GA 30309				5,000
JEWISH HOME LIFE COMMUNITIES	N/A	PUBLIC	ANNUAL CONTRIBUTION.	
3150 HOWELL MILL ROAD, N.W.		-		
ATLANTA GA 30327				5,000
JEWISH WOMEN'S FUND OF ATLANTA 1440 SPRING ST.,NW	N/A	PUBLIC	ANNUAL CONTRIBUTION.	
ATLANTA, GA 30309				3,000
WEINSTEIN HOSPICE	N/A	PUBLIC	ANNUAL CONTRIBUTION.	
3150 HOWELL MILL ROAD, N.W. ATLANTA, GA 30327				1,000
RIDANIA, GA 30327				1,000
PIEDMONT HOSPITAL FOUNDATION	N/A	PUBLIC	ANNUAL CONTRIBUTION.	
2001 PEACHTREE ROAD, SUITE 400	N/A	FOREIC	ANNOAL CONTRIBUTION.	
ATLANTA, GA 30309				5,000
UNION FOR REFORM JUDAISM	N/A	PUBLIC	ANNUAL CONTRIBUTION.	
633 THIRD AVENUE				5,000
NEW YORK, NY 10017	,			5,000
INITAN EAR REFORM TIPLICA	NT / A	DIEL TO	TN HONOP OF DARW	
UNION FOR REFORM JUDAISM 633 THIRD AVENUE	N/A	PUBLIC	IN HONOR OF DARYL MESSINGER.	
NEW YORK, NY 10017				5,000
Total from continuation sheets				185,746

Part XV Supplementary Information 3 Grants and Contributions Paid During the Y				<del></del> -
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	contribution	
GRADY HEALTH FOUNDATION 191 PEACHTREE STREET, SUITE 820 ATLANTA, GA 30303	N/A	PUBLIC	10TH ANNUAL WHITE COAT GRADY GALA.	10,000
JEWISH FEDERATION OF GREATER ATLANTA 1440 SPRING ST.,NW ATLANTA, GA 30309	N/A	PUBLIC	ANNUAL CONTRIBUTION.	15,000
AMERICAN JEWISH COMMITTEE 6 PIEDMONT CENTER, SUITE 510 ATLANTA, GA 30305	N/A	PUBLIC	2020 CAPITAL CAMPAIGN IN HONOR OF MELANIE AND ALLAN NELKIN.	15,000
JEWISH HOME LIFE COMMUNITIES 3150 HOWELL MILL ROAD, N.W. ATLANTA GA 30327	N/A	PUBLIC	2020 ANNUAL CONTRIBUTION.	25,000
JEWISH HOME LIFE COMMUNITIES 3150 HOWELL MILL ROAD, N.W. ATLANTA, GA 30327	N/A	PUBLIC	ENDOWMENT CONTRIBUTION.	17,000
JEWISH FEDERATION OF GREATER ATLANTA 1440 SPRING ST.,NW ATLANTA, GA 30309	N/A	PUBLIC	ANNUAL CONTRIBUTION.	5,000
PIEDMONT HOSPITAL FOUNDATION 2001 PEACHTREE ROAD, SUITE 400 ATLANTA, GA 30309	N/A	PUBLIC	ANNUAL CONTRIBUTION.	5,000
JEWISH FAMILY & CAREER SERVICES 4549 CHAMBLEE DUNWOODY ROAD ATLANTA GA 30338	N/A	PUBLIC	ANNUAL CONTRIBUTION.	1,000
COMMUNITY FOUNDATION FOR GREATER ATLANTA 191 PEACHTREE STREET, SUITE 1000 ATLANTA GA 30303	N/A	PUBLIC	GREATER GOOD AWARD.	5,000
JEWISH HOME LIFE COMMUNITIES 3150 HOWELL MILL ROAD, N.W. ATLANTA GA 30327 Total from continuation sheets	N/A	PUBLIC	2020 ENDOWMENT CONTRIBUTION.	5,000

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Part XV Supplementary Information Grants and Contributions Paid During the			-	· · · · · · · · · · · · · · · · · · ·
3 Grants and Contributions Paid During the Recipient	If recipient is an individual	· [		<del></del>
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Traine and address (nome or business)	or substantial contributor	recipient		
BEIT TSHUVAH	N/A	PUBLIC	ANNUAL CONTRIBUTION.	
8831 VENICE BOULEVARD				
LOS ANGELES, CA 90034		<del> </del>		1.800.
TULANE UNIVERSITY	N/A	PUBLIC	ANNUAL CONTRIBUTION.	
6823 ST. CHARLES AVENUE				
NEW ORLEANS, LA 70118		<u> </u>		16,946,
				<del></del>
			-	
				<u>.</u>
				•
				<del> </del>
Total from continuation sheets				

#### Part XVI-A **Analysis of Income-Producing Activities**

Unrelated	Unrelated business income		by section 512, 513, or 514	(e)	
(a) Business	(b) Amount	sion	(d)	Related or exempt function income	
code	Amount	code	Amount	- Idilotton moonic	
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		14	84,401.		
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			05.440		
		14	27,143.		
		18	-4,068.		
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_					
	(	0.	107,566.	(	
			13	107,566	
	(a) Business code	Business code  Amount	Business code  Amount   14  14  18  18	(a) Business Amount Ecode (d) Amount (d) Amo	

#### Relationship of Activities to the Accomplishment of Exempt Purposes Part XVI-B

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

Form **990-PF** (2019)

Ра	rt XVII		•	iters to a	nd Transactions a	nd Relationsi	nips with Nonc	naritable	!	
		Exempt Organ					504/->	<del></del>	Yes	No
1					g with any other organization		ion 501(c)		162	INO
	•		•		to political organizations?					
а	Transfers	from the reporting found	ation to a noncharitab	le exempt or	ganization of:					
	(1) Cash							1a(1)		<u>X</u>
	(2) Other	assets						1a(2)		X
b	Other tran	sactions:								
	(1) Sales	of assets to a noncharita	ble exempt organization	on				1b(1)		X
	(2) Purcl	nases of assets from a no	ncharitable exempt or	ganization				1b(2)		_X_
	(3) Renta	al of facilities, equipment,	or other assets					1b(3)		X
		bursement arrangements						1b(4)		X
	• •	s or loan guarantees						1b(5)		X
	. ,	rmance of services or me	embership or fundrais	ino solicitatio	ns			1b(6)		X
c	• •	f facilities, equipment, ma	· ·	-				1c		X
	-				dule. Column (b) should al	ways show the fair i	market value of the goo	ds. other ass	ets.	
٠		-		_	ed less than fair market vali				,	
		i) the value of the goods,						,		
(a)	ne no	(b) Amount involved	·		exempt organization	(d) Description	n of transfers, transactions,	and sharing ar	rangeme	ents
<u>\-,-</u>		(-)	(0)	N/A		(4,				
				II/A		_				
		***				-			<del></del>	
	-		-							
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2a	Is the fou	ndation directly or indirec	tly affiliated with, or re	elated to, one	or more tax-exempt organ	zations described				_
	in section	501(c) (other than section	on 501(c)(3)) or in sec	tion 527?				Yes	X	No
b	If "Yes," c	omplete the following sch	edule.							
		(a) Name of org			(b) Type of organization		(c) Description of relat	ionship		
		N/A								
		·								
	•									
	Under	penalties of perjury, I declare	that I have examined this	return, includin	g accompanying schedules and	statements, and to the	best of my knowledge	May the IDS	diecuee	thie
Sig	and b	elief, it is true, correct, and con	mplete Declaration of prep	parer (other than	n taxpayer) is based on all inforr	nation of which prepare	r has any knowledge	May the IRS return with the shown below	e prepar	er
He		( all day a	$1 \times 1 \times$	N	- 14/21/202	TRUST	rr:	X Yes		οN
	Sign	nature of officer or trustee	, 700		Date Date	Title				
_	1 5.9	Print/Type preparer's n		Preparer's s		Date	Check If P	TIN		
				1 _1	1	,	self- employed	. · · <del>-</del>		
Pa	id	STEPHEN M.	DEDMAN A	Took also	Brace Cha	Uhihmo		P00031	702	
	eparer			EDMANT	C ACCOCTAMES	LLC	Firm's EIN ► 58			
	e Only	Firm s name > STE	renen M. DA	CKMAM	& ASSOCIATES	, шис	FILITS EIN > 50	TOAOT	J	
Ja	Jiny	Firm's address > 3.4	AE DESCRI	0.000.000	AD NO COTTO	1150	+			<del></del>
					AD, NE SUITE	, TT20	140	4) 262	21	01
		ra	LANTA, GA	30326	·	_ <del>_</del>	Phone no. (40	4) 262 Form <b>99</b> 0		
								Form 99	ノーピト	(2019)

# Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

## **Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF. ► Go to www.irs.gov/Form990 for the latest information. OMB No 1545-0047

Name of t	the organization		Employer identification number
	ТН	E BERMAN CHARITABLE TRUST	58-6195209
Organiza	tion type (check o		
Filers of:		Section:	
Form 990	or 990-EZ	501(c)( ) (enter number) organization	
		4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation	
		527 political organization	
Form 990	-PF	X 501(c)(3) exempt private foundation	
		4947(a)(1) nonexempt charatable trust treated as a private foundation	
		501(c)(3) taxable private foundation	
-	•	s covered by the <b>General Rule</b> or a <b>Special Rule</b> . (7), (8), or (10) organization can check boxes for both the General Rule and a Special Ru	ule. See instructions
General I	Rule		
	-	n filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling one contributor. Complete Parts I and II. See instructions for determining a contributor	
Special F	Rules		
;	sections 509(a)(1) any one contributo	n described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a or, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount in a Complete Parts I and II	, or 16b, and that received from
;	year, total contribu	n described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from utions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educity to children or animals. Complete Parts I, II, and III	
	year, contributions is checked, enter l purpose Don't co	n described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from secularized for religious, charitable, etc., purposes, but no such contributions totaled make the total contributions that were received during the year for an exclusively religious implete any of the parts unless the <b>General Rule</b> applies to this organization because it e, etc., contributions totaling \$5,000 or more during the year	nore than \$1,000. If this box s, charitable, etc., received <i>nonexclusively</i>
but it mu	st answer "No" on	nat isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (I Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its F the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)	

Name of organization

1

**Employer identification number** 

### THE BERMAN CHARITABLE TRUST

58-6195209

Part I	Contributors (see instructions) Use duplicate copies of Part I if addition	nal space is needed.	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	STEPHEN M. BERMAN  2660 PEACHTREE RD., N.W., UNIT 20A  ATLANTA, GA 30305	\$ 15,000.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	CALMA A. BERMAN  2660 PEACHTREE RD., N.W., UNIT 20A  ATLANTA, GA 30305	\$\$ <u>99,899.</u>	Person Payroll Noncash X (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	•	\$	Person Payroll Oncash Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)

Name of organization

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Employer identification number

### THE BERMAN CHARITABLE TRUST

58-6195209

(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	569 SHS ISHARES TR. RUSSELL 1000		
2	GROWTH	   \$ 99,899.	12/24/19
(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

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**Employer identification number** 

THE BE	ERMAN CHARITABLE TRUST			58-6195209				
Part III	Exclusively religious, charitable, etc., contributor any one contributor. Complete columns (completing Part III, enter the total of exclusively religious Use duplicate copies of Part III if additional	<ul> <li>a) through (e) and the following line en</li> <li>c contributions of \$1,000 or</li> </ul>	try For organizations					
(a) No. from	(b) Purpose of gift	(c) Use of gift	(d) Desc	ription of how gift is held				
Part I								
		(e) Transfer of gif	t					
	Transferee's name, address, a	and ZIP + 4	Relationship of tra	nsferor to transferee				
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Desc	eription of how gift is held				
-		(e) Transfer of git						
	Transferee's name, address,	and ZIP + 4	Relationship of tra	nsferor to transferee				
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Desc	cription of how gift is held				
	(e) Transfer of gift							
	Transferee's name, address,	and ZIP + 4	Relationship of tra	nsferor to transferee				
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Desc	cription of how gift is held				
		(e) Transfer of git						
	Transferee's name, address,			nsferor to transferee				

FORM 990-PF INTERE	ST ON SAVING	S AND 7	rempor/	ARY	CASH	INV	ESTMENTS	ST	ATEMENT	1
SOURCE			(A) EVENUE R BOOKS		NET	INV	B) VESTMENT COME		(C) ADJUSTED ET INCOME	3
SUNTRUST BANK, ATLA	NTA			90.		·······•	90.			
TOTAL TO PART I, LI	NE 3			90.			90.		·	
FORM 990-PF	DIVIDENDS	AND IN	TEREST	FRO	M SEC	URI	TIES	ST.	ATEMENT	2
SOURCE	GROSS AMOUNT	CAPIT GAIN DIVIDE	1S		(A) VENUE BOOK		(B) NET INVES MENT INCO		(C) ADJUSTI NET INCO	
PERSHING ADVISOR SOLUTIONS - NOMINEE - PERSHING ADVISOR SOLUTIONS -	86,088.	1,	,818.		84,27	0.	84,27	0.		
NOMINEE - INTEREST	131.		0.		13	1.	13	1.		
TO PART I, LINE 4	86,219.	1,	,818.		84,40	1.	84,40	1.		
FORM 990-PF		ОТНЕ	R INCO	ME		<u> </u>		ST	ATEMENT	3
DESCRIPTION		~-	RE	(A) VENU BOO			(B) ET INVEST- ENT INCOME		(C) ADJUSTEI NET INCON	
ORDINARY INCOME - AND OPP. FUND, LTD	RROWPOINT IN	COME		27	,143.	-	27,143			
TOTAL TO FORM 990-P	F, PART I, I	LINE 11		27	,143.		27,143	•		

FORM 990-PF	LEGAL	FEES		ratement 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES
LEGAL FEES	5,535.	0.		5,535.
TO FM 990-PF, PG 1, LN 16A =	5,535.	0.		5,535.
FORM 990-PF	ACCOUNTI	NG FEES	S'	ratement 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES
ACCOUNTING FEES	11,000.	8,250.		2,750.
TO FORM 990-PF, PG 1, LN 16B	11,000.	8,250.		2,750.
FORM 990-PF	OTHER PROFES	SIONAL FEES	S'	ratement 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	16,000.	16,000.		0.
TO FORM 990-PF, PG 1, LN 16C	16,000.	16,000.		0.
FORM 990-PF	TAX	ES	S	PATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DESCRIPTION	<b>EXPENSES</b>	NET INVEST-	ADJUSTED	CHARITABLE

1 1

FORM 990-PF	OTHER E	XPENSES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVES MENT INCO		(C) ADJUSTED NET INCOM		
BANK FEES MARGIN INTEREST	70. 29.		0. 29.		7	70.
TO FORM 990-PF, PG 1, LN 23	99.		29.		7	70.
FORM 990-PF	CORPORAT	E STOCK			STATEMENT	9
DESCRIPTION			воо	K VALUE	FAIR MARKET	ŗ
SEE STATEMENT A MUTUAL FUNDS SEE STATEMENT B EXCHANGE TRAI	DE PRODUCTS	_	2	717,039.	667,63 2,235,13	
TOTAL TO FORM 990-PF, PART I	I, LINE 10B	=	2	,914,269.	2,902,77	70.
FORM 990-PF	OTHER INV	ESTMENTS			STATEMENT	10
DESCRIPTION		LUATION ETHOD	вос	K VALUE	FAIR MARKET VALUE	ŗ
ARROWPOINT INCOME OPPORTUNITY	FUND,	COST		500,000.	363,05	50.
TOTAL TO FORM 990-PF, PART I	I, LINE 13	_		500,000.	363,05	50.

} , 1

FORM 990-PF PART VIII - LIST TRUSTEES AND	OF OFFICERS, I FOUNDATION MANA		STATI	EMENT 1
NAME AND ADDRESS	TITLE AND AVRG HRS/WK		EMPLOYEE BEN PLAN CONTRIB	EXPENSE
STEPHEN M. BERMAN 2660 PEACHTREE RD., N.W. UNIT 20A ATLANTA, GA 30305	TRUSTEE 1.00	0.	0.	0
CALMA A. BERMAN 2660 PEACHTREE RD., N.W. UNIT 20A ATLANTA, GA 30305		0.	0.	0
JUSTIN F. BERMAN 2660 PEACHTREE RD., N.W. UNIT 20A ATLANTA, GA 30305	TRUSTEE 1.00	0.	0.	0
ALYZA B. MILRAD 2660 PEACHTREE RD., N.W. UNIT 20A ATLANTA, GA 30305	TRUSTEE 0.50	0.	0.	0
LILA B. FAIR 2660 PEACHTREE RD., N.W. UNIT 20A ATLANTA, GA 30305	TRUSTEE 0.50	0.	0.	0
TOTALS INCLUDED ON 990-PF, PAGE 6,	PART VIII	0.	0.	0
	XV - LINE 1A UNDATION MANAGE	ERS	STATI	EMENT 1

NAME OF MANAGER

STEPHEN M. BERMAN CALMA A. BERMAN