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Form 990-PF

Department of the Treasury
Internal Revenue Service

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.

Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0052

2019

Open to Public Inspection

For calendar year 2019, or tax year beginning 07-01-2019, and ending 06-30-2020

Name of foundation
The Zachs Family Foundation Inc

A Employer identification number
06-1157320

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

Room/suite

B Telephone number (see instructions)
(860) 727-5733

City or town, state or province, country, and ZIP or foreign postal code
Hartford, CT 06105

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 change

D 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 foundation

E 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) \$ 27,625,968

J Accounting method:

Cash

Accrual

Other (specify)

(Part I, column (d) must be on cash basis.)

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) (see instructions).)

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

Revenue

1 Contributions, gifts, grants, etc., received (attach schedule)

2 Check ☒ if the foundation is not required to attach Sch. B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

b Gross sales price for all assets on line 6a

7 Capital gain net income (from Part IV, line 2)

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances

b Less: Cost of goods sold

c Gross profit or (loss) (attach schedule)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

732,140

791,595

Operating and Administrative Expenses

13 Compensation of officers, directors, trustees, etc.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach schedule)

c Other professional fees (attach schedule)

17 Interest

18 Taxes (attach schedule) (see instructions)

19 Depreciation (attach schedule) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

24 Total operating and administrative expenses.
Add lines 13 through 23

25 Contributions, gifts, grants paid

26 Total expenses and disbursements. Add lines 24 and 25

94

20,778

68

20,940

1,240,440

1,261,380

3,300

17,478

68

17,640

1,243,740

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative, enter -0-)

-529,240

773,955

For Paperwork Reduction Act Notice, see instructions.

Cat. No. 11289X

Form 990-PF (2019)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	306,524	448,859	448,859
	2 Savings and temporary cash investments	808,861	435,479	435,479
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	17,160,242	17,029,543	21,758,989
	c Investments—corporate bonds (attach schedule)		750,000	750,000
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	5,055,741	1,988,764	4,232,641
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	23,331,368	20,652,645	27,625,968	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ 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	23,331,368	20,652,645	
29 Total net assets or fund balances (see instructions)	23,331,368	20,652,645		
30 Total liabilities and net assets/fund balances (see instructions) .	23,331,368	20,652,645		

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	23,331,368
2 Enter amount from Part I, line 27a	2	-529,240
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	22,802,128
5 Decreases not included in line 2 (itemize) ▶ _____	5	2,149,483
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	20,652,645

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a See Additional Data Table			
b			
c			
d			
e			

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-59,453
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		3	13,087

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

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

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

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



Yes



No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	1,253,952	23,199,547	0.05405
2017	1,332,177	26,114,870	0.05101
2016	1,233,852	24,245,631	0.05089
2015	1,348,526	24,245,631	0.05562
2014	997,300	26,119,455	0.03818

2 Total of line 1, column (d)	2	0.249754
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.049951
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	26,004,295
5 Multiply line 4 by line 3	5	1,298,941
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	7,740
7 Add lines 5 and 6	7	1,306,681
8 Enter qualifying distributions from Part XII, line 4	8	1,243,740

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ 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 ☐ and enter 1% of Part I, line 27b	1	15,479
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	
3	Add lines 1 and 2.	3	15,479
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	15,479
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	32,878
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	32,878
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached.	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	17,399
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax 17,399 Refunded	11	

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>Holly Martino</u> Telephone no. ▶ <u>(860) 727-5733</u>			

Located at ▶ 40 Woodland Street Hartford CTZIP+4 ▶ 06105

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			
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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 ☒ 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.) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions ☐	1b	No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019? ☐	1c	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.) ☐	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2019.) ☐	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b	No

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

5a	During the year did the foundation pay or incur any amount to:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	☐ Yes ☒ No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions		5b	
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d).	☐ Yes ☐ No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		6b	No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No		7b	
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?			
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	☐ Yes ☒ No		

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

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Henry M Zachs 181 Mountain Springs Road Farmington, CT 06032	President 0.00	0		
Judith M Zachs 20090 Boca West Drive 342 Boca Raton, FL 33434	VPresident/Secr 0.00	0		
Eric Zachs 53 Norwood Rd West Hartford, CT 06117	Director 0.00	0		
William Zachs 9 DICK PLACE EDINBURGH, SCOTLAND EH 2 JS UK	Director 0.00	0		
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. ▶		

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

1	Expenses

Part IX-B Summary of Program-Related Investments (see instructions)

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	20,505,782
b	Average of monthly cash balances.	1b	1,099,228
c	Fair market value of all other assets (see instructions).	1c	4,795,290
d	Total (add lines 1a, b, and c).	1d	26,400,300
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	
3	Subtract line 2 from line 1d.	3	26,400,300
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	396,005
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	26,004,295
6	Minimum investment return. Enter 5% of line 5.	6	1,300,215

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	1,300,215
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	15,479
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	15,479
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,284,736
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,284,736
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	1,284,736

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	1,243,740
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
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	1,243,740
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,243,740

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				1,284,736
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2019:				
a From 2014.				
b From 2015. 64,561				
c From 2016. 46,438				
d From 2017. 47,135				
e From 2018. 118,199				
f Total of lines 3a through e.	276,333			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 1,243,740				
a Applied to 2018, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).	0			
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2019 distributable amount.				1,243,740
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2019.	40,996			40,996
<i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	235,337			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a.	235,337			
10 Analysis of line 9:				
a Excess from 2015. 23,565				
b Excess from 2016. 46,438				
c Excess from 2017. 47,135				
d Excess from 2018. 118,199				
e Excess from 2019.				

Part XIV

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling.

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2019	(b) 2018	(c) 2017	(d) 2016	

b 85% of line 2a					
-----------------------------------	--	--	--	--	--

c Qualifying distributions from Part XII, line 4 for each year listed					
--	--	--	--	--	--

d	Amounts included in line 2c not used directly for active conduct of exempt activities				
----------	---	--	--	--	--

e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
--	--	--	--	--	--

3	Complete 3a, b, or c for the alternative test relied upon:				

[illegible]

(1) Value of all assets					
-----------------------------------	--	--	--	--	--

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
---	--	--	--	--	--

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
---	--	--	--	--	--

c "Support" alternative test—enter:					
-------------------------------------	--	--	--	--	--

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
---	--	--	--	--	--

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
---	--	--	--	--	--

(3) Largest amount of support from an exempt organization					
---	--	--	--	--	--

(4) Gross investment income					
-----------------------------	--	--	--	--	--

Part XV **Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

Henry M Zachs

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a The name, address, and telephone number or email address of the person to whom applications should be addressed:

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	1,240,440
b <i>Approved for future payment</i>				
Total			▶ 3b	

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
		14	1	
		14	791,594	
				-59,455
			791,595	-59,455

732,140

[illegible]

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

		Yes	No
--	--	-----	----

--	--	--

1a(1)		No
1a(2)		No

--	--	--

1b(1)	No
--------------	-----------

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

1b(3)		No
--------------	--	-----------

1b(4)		No
--------------	--	-----------

1b(5)		No
--------------	--	-----------

1b(6)		No
--------------	--	-----------

1c		No
----	--	----

value
ue[illegible]

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

**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.

2021-01-05

Signature of officer or trustee

Date _____

Title

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ Yes ☐ No

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P01269351
	Firm's name ▶ Barry C Broden CPA PA				Firm's EIN ▶ 59-2225781
	Firm's address ▶ 5129 Northwest 24th Way Boca Raton, FL 33496				Phone no. (860) 916-1724

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
BLACKROCK LIQUIDITY	P	2018-11-28	2020-03-18
BLACKROCK LIQUIDITY	P	2019-07-19	2020-03-18
BAIN CAPITAL SPECIAL	P	2018-11-15	2019-12-23
TRIM.COM GROUP	P	2015-08-13	2019-12-24
BENEFITFOCUS	P	2019-03-01	2019-12-23
BLACKROCK LIQUIDITY	P	2018-11-28	2019-09-18
MSIF ULTRA ST INC A	P	2019-02-08	2019-12-10
CONFORMIS	P	2011-10-18	2019-12-23
MSIF ULTRA ST INC A	P	2019-02-03	2019-09-17
T-MOBILE	P	2013-06-06	2020-04-01

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
129,706		129,784	-78
889,397		890,154	-757
147,716		149,850	-2,134
343,093		352,730	-9,637
4,441		9,650	-5,209
200,000		199,940	60
50,000		50,013	-13
14,130		149,984	-135,854
150,000		150,013	-13
37			37

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
			-78
			-757
			-2,134
			-9,637
			-5,209
			60
			-13
			-135,854
			-13
			37

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

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
MSIF ULTRA ST INC A	P	2019-11-26	2020-06-03
MSIF ULTRA ST INC A	P	2019-11-11	2020-06-03
WARNER MUSIC GROUP	P	2020-06-03	2020-06-03
ZOOM TECHNOLOGIES	P	2020-06-04	2020-06-04
SPRINT	P	2005-09-01	2020-04-03
ICONIQ STRATEGIC PTRS B-K-I	P	2019-12-01	2019-12-31
ICONIQ STRATEGIC PTRS B-K-I	P	2017-12-01	2019-12-31
ICONIQ STRATEGIC PTRS II B-K-I	P	2017-12-01	2019-12-31
ICONIQ STRATEGIC PTRS II B-K-I	P	2019-12-01	2019-12-31
Wash Sale			

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
18,165		18,186	-21
23,423		23,510	-87
134,391		125,000	9,391
24,602		10,500	14,102
35			35
		9,465	-9,465
57,203			57,203
17,888			17,888
5,097			5,097
			2

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
			-21
			-87
			9,391
			14,102
			35
			-9,465
			57,203
			17,888
			5,097

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
American Cancer Society 260 Osborne road Loudonville, NY 12211	none	Public	GENERAL USE	100
Beth El Temple2626 ALBANY AVE WEST HARTFORD, CT 06117	member	Public	GENERAL USE	7,271
The Bushnell166 CAPITOL AVE HARTFORD, CT 06106	Trustee-Vice Chair	Public	GENERAL USE	25,540
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Chabad House2352 ALBANY AVE WEST HARTFORD, CT 06117	none	Public	camp gam 10000General Use 15000	25,000
Charter Oak Cultural Center 21 CHARTER OAK AVE HARTFORD, CT 06104	none	Public	GENERAL USE	13,859
CPTV1049 ASYLUM AVENUE HARTFORD, CT 06105	none	Public	GENERAL USE	500
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CT Historial Society ONE ELIZABETH STREET HARTFORD, CT 06105	trustee	Public	GENERAL USE	13,200
Hadassah740 NORTH MAIN STREET WEST HARTFORD, CT 06117	none	Public	GENERAL USE	1,000
Hartford Public Library500 MAIN STREET HARTFORD, CT 06103	none	Public	GENERAL USE	1,500
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Hebrew High School OF NEW ENGLAND 300 BLOOMFIELD AVENUE WEST HARTFORD, CT 06117	Director	Public	GENERAL USE	20,700
Hill-Stead Museum35 MOUNTAIN ROAD FARMINGTON, CT 06032	none	Public	GENERAL USE	3,500
Jewish Community Center 333 BLOOMFIED AVENUE WEST HARTFORD, CT 06117	none	Public	GENERAL USE	20,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PMCJimmy Fund 10 BROOKLINE PLACE WEST BROOKLINE, MA 02445	none	Public	GENERAL USE 100GI Research 360	460
REAL ART WAYS56 ARBOR STREET HARTFORD, CT 06106	none	Public	GENERAL USE	7,500
University of Connecticut-Hillel 115 NORTH EAGLEVILLE ROAD STORRS, CT 06268	Director	Public	general use	117,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
University of Connecticut Ballard I 2390 ALUMNI DRIVE STORRS, CT 06269	none	PC	GENERAL USE	5,000
University of Hartford 200 BLOOMFIELD AVENUE WEST HARTFORD, CT 06117	Former Advisor-Hillel	Public	Hartt School 1500 Art School 1000 Hillel Endow 7000 Greenberg Ctr 3000Barney School 1000Hillel Gen.Use 9500	23,000
Wadsworth Atheneum600 MAIN STREET HARTFORD, CT 06103	trustee	Public	GENERAL USE 25000Library 500	25,500
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JFACT40 WOODLAND STREET HARTFORD, CT 06105	BOARD MEMBER/Treasurer	Public	GENERAL USE	10,000
Jewish Federation 333 BLOOMFIELD AVENUE WEST HARTFORD, CT 06117	Director,Forme President	Public	GENERAL USE 95600PJ Library 5000Monemtum Prog 10000Emergency Fund 50000	160,600
Hebrew Senior Care1 ABRAHMS BLVD WEST HARTFORD, CT 06117	none	Public	GENERAL USE	40,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Connecticut Science Center 250 COLUMBUS BLVD HARTFORD, CT 06103	none	PUBLIC	GENERAL USE	5,000
Oak Hill School Foundation 120 HOLCOMB STREET HARTFORD, CT 06112	trustee	PUBLIC	GENERAL USE 51200 Employee Appr 7200	58,400
Camp Laurelwood 463 SUMMER HILL ROAD MADISON, CT 06443	TRUSTEE	PUBLIC	GENERAL USE	97,000
Total ► 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Nalt Conference for Community Justi 820A PROSPECT HILL RD WINDSOR, CT 06095	none	PUBLIC	GENERAL USE	10,000
Hartford Stage50 CHURCH STREET HARTFORD, CT 06103	none	PUBLIC	GENERAL USE	10,000
CONNECTICUT COLLEGE-Hillel 270 MOHEGAN AVENUE NEW LONDON, CT 06320	none	PUBLIC	endowment	25,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Trinity College300 Summit Street Hartford, CT 06106	ALUMNI,FORMER TRUSTEE	PUBLIC	Alumni 25000 Library 10000 Hillel En 25500 Student Fd 5000General Use 4000	69,500
Jewish Educational Trade School 1660 Rinaldi Street Granada Hills, CA 91344	none	PUBLIC	General Use	6,000
Hartford Hospital Foundation 80 Seymour Street Hartford, CT 06102	corporator	PUBLIC	Endowment	10,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Jewish Family Services 333 Bloomfield Avenue West Hartford, CT 06117	none	PUBLIC	General Use	6,000
Nutmeg Big Brothers Big Sisters 30 Laurel Street Hartford, CT 06106	none	PUBLIC	General Use	2,500
Solomon Schecher Day School 26 Buena Vista Road West Hartford, CT 06107	trustee	PUBLIC	General Use	100,000
Total ▶ 3a				1,240,440

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Junior Acheivement193 Grand Sreet Waterbury, CT 06702	none	PUBLIC	General Use	1,000
Birthright Israel Foundation 33 East 33rd Street New York, NY 10016	none	PUBLIC	General Use	6,000
Young Israel of West Hartford 2240 Albany Ave West Hartford, CT 06117	none	PUBLIC	General Use	2,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Hillel Internation800 8th Steet NW Washington, DC 20001	none	PUBLIC	General Use	2,500
Goodspeed Opera House6 Main Street East Haddam, CT 06423	none	PUBLIC	endowment	1,000
Hartford Symphony Orchestra 166 Capitol Avenue Hartford, CT 06106	none	PUBLIC	General Use	10,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
United Synagogues of Conserrvative 120 Broadway ste1540 New York, NY 10271	none	PUBLIC	General Use	100
Capital Community College 950 Main Street Hartford, CT 06103	none	PC	General Use	1,000
Anti Defamation League 1952 Whitney Ave Hamden, CT 06517	none	PC	General Use	1,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Alzheimer Association 2075Silas Deane hwy Rocky Hill, CT 06067	none	PC	General Use	500
American Beethoven Society One Washington Sq San Jose, CA 95152	none	PC	General Use	100
American Heart Association 1 Union Street Robinsville, NJ 08691	none	PC	General Use	100
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
American Lung AssociationPO Box 7000 Albert Lea, MN 56007	none	PC	General Use	100
American Red CrossPO Box 5003 Hartford, CT 06102	none	PC	General Use	100
American School for the Deaf 139 North Main street West Hartford, CT 06102	none	PC	General Use	400
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
American Society for Yad Vashem 500 Fifth Avenue New York, NY 10110	none	PC	General Use	100
AmericanTechnion Society One Gateway Center Newton, MA 02458	none	PC	General Use	2,500
Ancient Burying Ground Assn PO BOX 347 Hartfod, CT 06141	none	PC	General Use	200
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Arthritis Foundation35 Cold Spring Rd Hill, CT 06067	none	PC	General Use	500
Boys and Girls Club Hartford170 Sigourney Street Hartford, CT 06105	none	PC	GENERASL USE	50,000
Chai Mitzvah106 Timberwood Rd West Hartford, CT 06117	none	PC	General Use	2,500
Total ▶ 3a				1,240,440

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CT Childrens Medical Center Foundat 282 Washington Street Hartford, CT 06106	none	PC	Endowment	20,000
Connecticut HospicePO Box793 Bradford, CT 06405	none	PC	General Use	500
Farmington Police Benevolent Assn PO BOX 312 Unionville, CT 06085	none	PC	General Use	170
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Federation Homes156 Winterberry Ave Bloomfield, CT 06002	none	PC	General Use	500
Florence Griswold Museum 96 Lyme Street Old Lyme, CT 06371	FORMER TRUSTEE	PC	endowment	1,000
Foundation for Jewish Camp 253 west 35th street New York, NY 10001	none	PC	General Use	1,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Greater Hartford Art Council PO Box 23143 Hartford, CT 06123	none	PC	General Use	3,000
HARC900 Asylum Ave Hartford, CT 06105	none	PC	endowment	5,000
JDRF20 Batterson Park Road Farmington, CT 06032	none	PC	General Use	5,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Jewish Assoc for Community Living I 90 Asylum Avenue Hartford, CT 06105	none	PC	General Use	5,000
Jewish Coalition for Literacy 333 Bloomfield Ave West Hartford, CT 06117	none	PC	General Use	1,000
Jewish Funders Network 150 west 30th street New york, NY 10001	none	PC	General Use	1,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Jewish Historical Society 333 Bloomfield Ave West Hartford, CT 06117	none	PC	General Use	3,500
Jordan River Village244 Madison ave New York, NY 10016	none	PC	General Use	5,000
JT Connect333 Bloomfield Ave West Hartford, CT 06117	none	PC	General Use	15,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
KESHET284 Armory Street Jamaica Plains, MA 02130	none	PC	General Use	15,000
Kingswood Oxford170 Kingswood Road West Hartford, CT 06119	none	PC	General Use	500
Lambda Legal120 Wall Street New York, NY 10005	none	PC	General Use	500
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
The Leukemia Lymphoma Society PO Box 4072 Pittsfield, MA 01202	none	PC	General Use	200
Loomis Chaffee4 Batchelder road Windsor, CT 06095	none	PC	General Use	5,000
MAAD317 Foxon road East Haven, CT 06513	none	PC	General Use	500
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
The Mark Twain House 351 Farmington Ave Hartford, CT 06105	none	PC	General Use	1,000
Masoncare Charity FoundationPO Box 70 Wallingford, CT 06492	none	PC	General Use	500
Mental Health Assn61 South Main Street West Hartford, CT 06107	none	PC	General Use	100
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Mercaz USA136 East 39 th Streeet New York, NY 10016	none	PC	General Use	100
The Metropolitan OperaLincoln Center New York, NY 10023	none	PC	General Use	250
Mikveh Bess Israel61 North Main Street West Hartford, CT 06107	none	PC	General Use	500
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
National Multiple Scierosis Society 659 Tower Ave Hartford, CT 06112	none	PC	General Use	250
Muscular Distrophy Assn 127 Washington ave West North Haven, CT 06473	none	PC	General Use	100
National Yiddish Book Center 1021 West Street Amherst, MA 01002	none	PC	General Use	180
Total ▶ 3a				1,240,440

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
New Britain Museum of American Art 56 Lexington street New Britain, CT 06052	none	PC	General Use	2,500
Old Lyme Fire Dept69 lyme STreet Old Lyme, CT 06371	none	PC	General Use	200
Riverfront recapture50 Colubus Blvd hartford, CT 06106	none	PC	General Use	1,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Memorial Sloan Kettering Cancer Cen 1275 York Avenue New York, NY 10065	none	PC	General Use	1,000
ST Francis Foundation 95 Woodland Street Hartford, CT 06105	Corporator	PC	endowment	10,000
The Washington Institute 1828 L Street NW Washington, DC 20036	none	PC	General Use	1,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
United Way Foundation30 Laurel Street Hartford, CT 06106	FORMER TRUSTEE	PC	General Use	5,000
Unversity of Pennsylvania 3451 Walnut street Philadelphia, PA 19104	ALUMNI	PC	Hillel 1000 Kelly Writers 500Wharton 15000 Annual Fund 15000	31,500
Pitt Annual Fund128 North Craig Street Pittsburgh, PA 15260	none	PC	General Use	100
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
University of St Joseph 1678 Asylum avenue West hartford, CT 06117	none	PC	General Use	2,500
The Williston Northhampon School 19 Payson Avenue East Hampton, MA 01027	ALUMNI,FORMER TRUSTEE	PC	General Use	30,000
YMCA Greater Hartford 241 Trumbull Street Hartford, CT 06103	none	PC	General Use	250
Total ▶ 3a				1,240,440

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ACLU330 Main street Hartford, CT 06106	none	PC	General use	3,000
Hartford Blooms Garden Tours 111 Charter oak Avenue Hartford, CT 06105	none	PC	General Use	100
Playhouse Theater Group244 ParkRroad West Hartford, CT 06119	none	PC	General Use	500
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CT State NAACP2074 Park Street Hartford, CT 06104	none	PC	General Use	500
BBYO360 Amity Road Woodbridge, CT 06525	none	PC	General Use	6,000
Bated Breath Theatre Compamy 233 Pearl Street Hartford, CT 06103	none	PC	General Use	500
Total ▶ 3a				1,240,440

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Jewish National Fund77 Franklin Street Boston, MA 02114	none	PC	General Use	500
MSMAFPO Box 197 Collinsville, CT 06019	none	PC	General Use	400
Emanuel Synagogue160 Mohegan Drive WestHartford, CT 06117	none	PC	General Use	100
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Intensive Education Academy 840 North Main Street West Hartford, CT 06117	none	PC	General Use	250
Consevative Synagogue of Fith Avenu 11E 11th Street New York, NY 10003	none	PC	General Use	250
Voices of Hope 20 waterside Drive ste 100 Farmington, CT 06032	none	PC	General Use	1,000
Total ▶ 3a				1,240,440

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CT Immigration and Refugee Coalitio 40 Woodland Street Hartford, CT 06105	Landlord	PC	General Use	5,000
Chabad Jewish Center25 Harris Street Glastonbury, CT 06033	none	PC	General Use	1,500
Chabad at Univ of Ct15 Moulton Road Storrs, CT 06268	none	PC	General Use	2,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Hebrew Academy53 Gabb Road Bloomfield, CT 06002	none	PC	General Use	20,000
Prizmah-Center for Jewish Day Schoo 254 West 54th Street New York, NY 10019	none	PC	General Use	1,000
United Synagogues of Greater Hartfo 205 Mohawk Drive West Hartford, CT 06111	none	PC	General Use	100
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
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Name and address (home or business)				
a <i>Paid during the year</i>				
Connecticut Trust for Historic Pres 940 Whitney Avenue Hamden, CT 06517	none	PC	General Use	100
Norfolk Chamber Music Festiva PO Box 545 Norfolk, CT 06058	none	PC	General Use	350
British Academy-American Fund for C 2 Liberty Square Boston, MA 02109	none	PC	General Use	10,000
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
American Friends of Alyn Hostipal 122 E 42nd Street New York, NY 10168	none	PC	General Use	360
ALS Association5881 Glenridge Drive Atlanta, GA 30326	none	PC	General Use	1,000
Immigrant Heritage Hall of Fame PO Box 1525 New Britain, CT 06050	none	PC	General Use	1,500
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Children's Museum 950 Trout Brook Drive West Hartford, CT 06119	none	PC	General Use	1,000
18 DoorsPO Box 428 Newton Upper Falls, MA 02464	none	PC	General Use	350
Center for Children's Advocacy 65 Elizabeth Street Hartford, CT 06105	none	PC	General Use	500
Total ► 3a				1,240,440

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Hartford Artisan's Weaving Center 42 Woodland Street Hartford, CT 06105	Landlord	PC	General Use	300
Algemeiner208 East 51st Street New York, NY 11213	none	PC	General Use	250
Young Israel of East Brunswick Dunhams Corner Road East Brunswick, NJ 08816	none	PC	General Use	200
Total ▶ 3a				1,240,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Boys Scouts of America 60 Darlin Street East Hartford, CT 06108	none	PC	General Use	500
American Jewish World Service 45 West 36 Street New York, NY 10018	none	PC	General Use	2,500
Pennsylvania Gazette 3910 Chestnut Street Philadelphia, PA 19104	none	PC	General Use	100
Total ▶ 3a				1,240,440

TY 2019 Accounting Fees Schedule**Name:** The Zachs Family Foundation Inc**EIN:** 06-1157320**Software ID:** 19009920**Software Version:** 2019v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Software	94	94	0	0

TY 2019 Investments Corporate Bonds Schedule**Name:** The Zachs Family Foundation Inc**EIN:** 06-1157320**Software ID:** 19009920**Software Version:** 2019v5.0**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
COLUMBIA CARE	750,000	750,000

TY 2019 Investments Corporate Stock Schedule

Name: The Zachs Family Foundation Inc

EIN: 06-1157320

Software ID: 19009920

Software Version: 2019v5.0

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Vodafone Group PLC	5,067,265	3,894,588
Sprint		
Verizon Communications	6,272,313	7,098,098
ATT	2,182,470	1,934,720
Coca Cola	397,144	446,800
Opka Heath Inc	366,445	170,500
T-Mobile US	340,990	2,704,046
Glaxo Smith Kline	241,530	203,950
Apple	145,500	547,200
Bluebird Bio	623,915	244,160
Dish Network	328,950	172,550
Teva Pharmaceutical	87,511	23,452
Alibaba Group Holding-QSBS	28,052	104,830
Blackline-QSBS	49,390	744,946
Coupa Software	34,634	560,452
PYXUS INTERNATIONAL	28,025	470
ALTERYX CL A	27,092	333,488
BAIN CAPITAL SPECIALTY FINANCE		
BENEFITFOCUS		
PARSONS	13,500	18,120
PLURALSIGHT CL A	53,424	122,018
DOCUSIGN	12,259	148,962
UBER TECHNOLOGIES	202,523	145,330
ATT 5% SER A PFD	250,000	253,600
DATADOG	2,789	192,420
FASTLY	41,588	605,445
ADYEN	22,410	855,564
TRIP.COM GROUP	209,824	233,280

TY 2019 Investments - Other Schedule**Name:** The Zachs Family Foundation Inc**EIN:** 06-1157320**Software ID:** 19009920**Software Version:** 2019v5.0**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
T-MOBILE RIGHTS	AT COST	25,444	4,362
Macquarie Infrastructure Co LLC	AT COST	181,189	153,450
BLACKROCK LIQUIDITY	AT COST		
MSIF ULTRA SHORT INCOME A	AT COST	29,647	29,539
CONFORMIS-SERIES E1	AT COST		
CONFORMIS-SERIES E2	AT COST		
Iconiq Strategic Partners B LP	AT COST	294,349	791,805
Iconiq Opportunities Fund 2 LP	AT COST		
Mutualink Inc.	AT COST	500,000	500,000
Iconiq Strategic Partners II B	AT COST	958,135	2,753,485

TY 2019 Other Decreases Schedule**Name:** The Zachs Family Foundation Inc**EIN:** 06-1157320**Software ID:** 19009920**Software Version:** 2019v5.0

Description	Amount
Differences caused by K-1s on calendar basis versus 06/3/20	2,149,483

TY 2019 Other Professional Fees Schedule**Name:** The Zachs Family Foundation Inc**EIN:** 06-1157320**Software ID:** 19009920**Software Version:** 2019v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Data Analytics	3,300	0	0	3,300
Investment Expenses	17,478	17,478	0	0