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Form 990-PF

Return of Private Foundation

OMB No 1545-0047

Department of the Treasury Internal Revenue Service

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

2000

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning JUL 1, 2019, and ending JUN 30, 2020

ENVELOPE POSTMARK DATE MAY 14 2021

Name of foundation: MRHM, INC; Employer identification number: 13-4077880; Telephone number: 212-686-7160; City: NEW YORK, NY 10022; Accounting method: Cash; Fair market value: \$36,155,756.

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (Total: 3,788,108), Operating and Administrative Expenses (Total: 1,852,532), and Net investment income (3,643,822).

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	66,108.	88,917.	88,917.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 9	31,025,349.	32,858,956.	36,066,839.	
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	31,091,457.	32,947,873.	36,155,756.	
Liabilities	17 Accounts payable and accrued expenses	14,858.	15,183.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	14,858.	15,183.	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/>			
	and complete lines 24, 25, 29, and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	0.	0.	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
28 Retained earnings, accumulated income, endowment, or other funds	31,076,599.	32,932,690.		
29 Total net assets or fund balances	31,076,599.	32,932,690.		
30 Total liabilities and net assets/fund balances	31,091,457.	32,947,873.		

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	31,076,599.
2 Enter amount from Part I, line 27a	2	1,935,576.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	12,725.
4 Add lines 1, 2, and 3	4	33,024,900.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8	5	92,210.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	32,932,690.

Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e			1,867,397.

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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			1,867,397.

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 } { If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 } 3	1,867,397.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):		N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	1,903,378.	36,852,100.	.051649
2017	1,903,147.	38,164,804.	.049867
2016	1,703,154.	36,038,650.	.047259
2015	1,754,008.	35,107,911.	.049960
2014	1,677,238.	36,206,363.	.046324

2 Total of line 1, column (d)	.245059
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	.049012
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	36,153,187.
5 Multiply line 4 by line 3	1,771,940.
6 Enter 1% of net investment income (1% of Part I, line 27b)	36,438.
7 Add lines 5 and 6	1,808,378.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions.	1,723,340.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	72,876.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0.
3	Add lines 1 and 2	3	72,876.
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	72,876.
6	Credits/Payments:		
6a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	65,163.
6b	Exempt foreign organizations - tax withheld at source	6b	0.
6c	Tax paid with application for extension of time to file (Form 8868)	6c	48,000.
6d	Backup withholding erroneously withheld	6d	0.
7	Total credits and payments. Add lines 6a through 6d	7	113,163.
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	40,287.
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax <input type="checkbox"/> 40,287. Refunded <input checked="" type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a	X	
4b	X	
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		X

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-16 containing questions about controlled entities, distributions, public inspection requirements, website address, books in care, and foreign country interests.

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.

Table with 3 columns: Question, Yes, No. Rows 1a-4b containing questions about disqualifying acts, tax distribution failures, and business holdings.

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

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 10		0.	0.	0.

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

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

Total number of other employees paid over \$50,000 0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services ▶ 0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 LEGACY HERITAGE PROGRAMMING IX LLC - SEE PART XV ATTACHMENT	
	702,139.
2	
3	
4	

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 NONE	
	0.
2	
All other program-related investments See instructions.	
3 NONE	
	0.
Total. Add lines 1 through 3 ▶	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	0.
b	Average of monthly cash balances	1b	101,505.
c	Fair market value of all other assets	1c	36,602,238.
d	Total (add lines 1a, b, and c)	1d	36,703,743.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	36,703,743.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	550,556.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	36,153,187.
6	Minimum investment return. Enter 5% of line 5	6	1,807,659.

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	1,807,659.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	72,876.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	72,876.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,734,783.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,734,783.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,734,783.

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	1,723,340.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	1,723,340.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,723,340.

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				1,734,783.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			1,555,972.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ 1,723,340.				
a Applied to 2018, but not more than line 2a			1,555,972.	
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				167,368.
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 be distributed in 2020				1,567,415.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

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

Table with 5 columns: Tax year (a) 2019, (b) 2018, Prior 3 years (c) 2017, (d) 2016, (e) Total. Rows include 2a-e (Qualifying distributions) and 3a-d (Alternative tests).

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).)
NONE
b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.
NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:
Check here [X] 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.
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 Paid during the year				
SCHEDULE ATTACHED				1,716,143.
Total			▶ 3a	1,716,143.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

MRHM, INC

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 AIF VII PRIVATE INVESTORS (TE) LLC	P		
b LEGACY HERITAGE INVESTORS I LLC	P		
c LEGACY HERITAGE INVESTORS I LLC	P		
d LEGACY HERITAGE INVESTORS I LLC SEC 1256	P		
e LEGACY HERITAGE INVESTORS I LLC SEC 1256	P		
f LITIGATION PROCEEDS	P		
g			
h			
i			
j			
k			
l			
m			
n			
o			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			-11,002.
b			7,623.
c			1,870,467.
d			-4.
e			-5.
f			318.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-11,002.
b			7,623.
c			1,870,467.
d			-4.
e			-5.
f			318.
g			
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	1,867,397.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	N/A

MRHM, INC.

EIN: 13-4077880

Schedule of Contributions

June 30, 2020

Note Except as indicated, all of the entities listed below are US IRC Section 501 (c)(3) public charities None of the recipients included in this schedule are individuals with any relationship to any foundation manager or substantial contributor

Date	Donee	Contributions
10/03/2019	Yeshiva University, Stern College for Women 245 Lexington Ave , New York, NY 10016 Purpose Provide support for the university's program for students majoring in Jewish education	\$ 107,350
01/15/2020	(*) Amutat Malca Derech Sara 8 T D 364 Zichron Yaakov, Israel 30900 Purpose Provide support for the construction of organization's educational campus	8,559
04/06/2020	Keshet Jewish Parents of Children with Special Needs 600 Academy Drive, Northbrook, IL 60062 Purpose Funding to support development of the organization's senior leadership, strengthen its infrastructure and stimulate a broadening of the organization's capacity to impact those benefiting from its services	50,700
04/06/2020	Sefaria, Inc 195 Montague St , Suite 1203, Brooklyn, NY 11201 Purpose Funding to provide support to expand the organization's online text-based educational programming	198,500
04/06/2020	Meor, Inc 1560 Broadway, Suite 1005, New York, NY 10036 Purpose Provide support for the organization's religious and educational programming.	185,000
04/17/2020	American Physicians Fellowship 2001 Beacon Street, Suite 210, Boston, Massachusetts 02135-7771 Purpose Funding to provide advanced training in oncology and pediatric medicine to physicians in North America that will apply their knowledge in hospitals abroad	37,275
04/17/2020	Union of Orthodox Jewish Congregations of America 11 Broadway, New York, NY 10004 Purpose Provide support for the organization's religious and educational programming	125,000
05/29/2020	The Greater Washington Jewish Coalition Against Domestic Abuse 143 Rollins Ave , Rockville, MD 20847 Purpose Funding to support development of the organization's senior leadership, strengthen its infrastructure and stimulate a broadening of the organization's capacity to impact those benefiting from its services	33,500
05/29/2020	Mazon, Inc - A Jewish Response to Hunger 10850 Wilshire Blvd , Suite 400, Los Angeles, CA 90024 Purpose Funding to support development of the organization's senior leadership, strengthen its infrastructure and stimulate a broadening of the organization's capacity to impact those benefiting from its services	20,000
05/29/2020	Jewish Council of Public Affairs, Inc 116 East 27th St , New York, NY 10016 Purpose Funding to support development of the organization's senior leadership, strengthen its infrastructure and stimulate a broadening of the organization's capacity to impact those benefiting from its services	60,000
06/15/2020	Hebrew College Andover Newton Theological School, 160 Herrick Road, Newton, MA 02459 Purpose Funding to support the organization's educational programming	33,120

06/15/2020	Davis Memorial Fund 25 Lawrence Ave , Lawrence, NY 11559 Purpose Funding to support the organization's charitable programming	20,000
06/15/2020	Young Israel of Woodmere 859 Peninsula Blvd , Woodmere, NY 11598 Purpose Funding to support the organization's charitable programming	10,000
06/15/2020	Tomchei Shabbos Yad Yeshaya 634 Oak Drive, Far Rockaway, NY 11691 Purpose Funding to support the organization's charitable programming	15,000
06/15/2020	Amudim Community Resources 11 Broadway #1076, New York, NY 10004 Purpose Funding to support the organization's charitable programming	20,000
06/15/2020	Mesila 78 College Rd , Monsey, NY 10952 Purpose Funding to support the organization's charitable programming	15,000
06/15/2020	Upper East Side Hatzalah 125 E 85th St , New York, NY 10028 Purpose Funding to support the organization's charitable programming	10,000
06/15/2020	Achiezer Community Resource Center 334 Central Avenue, Lawrence, NY 11559 Purpose Funding to support the organization's charitable programming.	10,000
06/15/2020	Samaritan House 295 N Access Rd , South San Francisco, CA 94080 Purpose Funding to support the organization's charitable programming	10,000
06/15/2020	San Francisco Food Bank 900 Pennsylvania Ave , San Francisco, CA 94107 Purpose Funding to support the organization's charitable programming	10,000
06/15/2020	American Friends of Leket Israel Inc PO Box 2090, Teaneck, NJ 07666-1490 Purpose Funding to support the organization's charitable programming	15,000
06/15/2020	Friends of United Hatzalah 208 E 51st St #303 New York, NY 10022 Purpose Funding to support the organization's charitable programming	20,000
	Subtotal - Charitable Contributions	1,014,004
See Part XV	Direct charitable expenditures Legacy Heritage Programming IX LLC	702,139
		\$ 1,716,143
	(*) Indicates non public charity engaged in charitable, educational, religious or scientific activities Expenditure responsibility statements required by Reg Sec 53 4945-5(d) for the above, are attached to the tax return	

MRHM, INC.
EIN 13-4077880
Attachment to Form 990-PF
Tax Year Ended June 30, 2020
Statement required by IRC Regulations § 53.4945-5(d)

INFORMATION WITH RESPECT TO EXPENDITURE RESPONSIBILITY GRANTS

(1) Grantee: Amutat Malca
Derech Sara 8 T.D. 364 Zichron Yaakov, Israel 30900

(2) Date(s) and amount of grant(s):

- a. Total approved \$1,250,000
- b. Date approved 6/17/2014
- c. Amounts paid in current tax year:

<u>Date of payment</u>	<u>Amount of payment</u>
01/15/2020	\$8,559

(3) Purpose of grant(s):

Purpose: Provide support for the construction of organization's educational campus.

(4) Amounts expended by Grantee, based upon most recent report received from Grantee:

(This includes amounts received and expended by Grantee on this grant since inception of grant through most recent report date, noted below)

\$1,108,138

(5) Diversion:

To the knowledge of the foundation and based on the report(s) furnished by the Grantee, no part of the grant has been used for other than its intended purpose.

(6) Date of report(s) received from grantee:

11/27/2019

(7) Verification

(*) Pursuant to Reg. §53.4945-5(d)(4), reports received by a private foundation after the close of its accounting year may be reported on the Grantor's information return for the year in which such reports are received from the Grantee.

MRHM, Inc 13-4077880

Attachment to 990-PF, Part IX-A
Attachment to 990PF, Part XV
Year ended June 30, 2020

Legacy Heritage Programming IX LLC

Legacy Heritage Programming IX LLC (Programming IX), a wholly owned subsidiary of MRHM, Inc. operated The Nachshon Project Gap Year and Graduate School Fellowship Request for advance approval of these programs was made from the IRS on August 24, 2017 The programs are described below.

- 1 Total expenses incurred by Programming IX to operate its programs amounted to \$702,139 Costs are reported in Part IX-A
- 2 No grants, awards nor any payments were made to any foundation manager or substantial contributor.

Nachshon Project Gap Year Fellowship

Participants in the Nachshon Project, (an educational program sponsored by JLRJ, Inc., a nonprofit organization,) may take up to two years upon graduation to develop their professional and/or academic skills through internships, prestigious fellowships, and Jewish learning programs. Fellows are eligible for up to \$15,000 to fund year-long unpaid internships or programs.

Gap Year Fellowship stipends granted during the fiscal year ended June 30, 2020 were as follows:

<u>Name</u>	<u>Address</u>	<u>City, State, Zip</u>	<u>Amount</u>
Albert Kohn	335 North Highland Ave.	Merion, PA 19066	\$ 15,000
Avidan Halivni	81 Larkdale Rd	Deerfield, IL 60015	15,000
Hannah Taylor	17 Lakin St.	Needham, MA 02494	7,500
Micah Cowan	13817 Congress Dr	Rockville, MD 20853	5,000
Miriam Lichtenberg	1606 Rugby Rd.	Teaneck, NJ 07666	5,000

Nachshon Project Graduate School Fellowship

Participants in the Nachshon Project, (an educational program sponsored by JLRJ, Inc , a nonprofit organization,) who continue on to graduate degrees that prepare them for professional careers in the Jewish community may apply for The Nachshon Project Graduate Fellowship. Graduate Fellows are granted up to \$30,000 annually for the duration of their studies (the funds can be used to pay for tuition and living expenses) The Graduate Fellowship provides Fellows with tools, skills, and networking opportunities to help them succeed in their future careers as Jewish communal professionals

Upon completing graduate school, Graduate Fellows are required to work professionally within the North American Jewish community for 1.5 years for each year that they received financial support for their graduate education In order to fulfill the work requirement, Fellows must take a job with a charitable organization whose primary mission is to serve the Jewish community in North America, in a position which directly furthers the Jewish mission of that organization The position must be approved in advance by The Nachshon Project.

Graduate School Graduate Fellowship stipends granted during the fiscal year ended June 30, 2020 were as follows:

<u>Name</u>	<u>Address</u>	<u>City, State, Zip</u>	<u>Amount</u>
Jackson Vance Mercer	33 Calafia Court	San Rafael, CA 94903	\$ 25,000
Jesse Nagelberg	51 Patton Drive	East Brunswick, NJ 08816	30,000
Megan Brumer	16583 SE 48th Court	Bellevue, WA 98006	30,000
Benjamin Forester	105 E. Greenbriar Dr.	Deerfield, IL 60015	30,000
Ella Kahan	9053 Tamaroa Terrace	Skokie, IL 60076	30,000
Leah Beck	7600 NE 60th St	Vancouver, WA 98662	30,000
Peter Young	5414 Jon Dodson Dr.	Agoura Hills, CA 91301	30,000
Aaron Torop	14099 Jennifer Terrace	Largo, FL 33774	30,000
Benjamin Hersch	260 Main St.	Medford, MA 02155	30,000
Betty Sobel	Bet Haarava 24	Jerusalem, Israel 91000	30,000
Daniel Albert	164 Main Pkwy W	Plainview, NY 11803	30,000
Eva Bogomolny	4013 Laurel Circle	Orange Village, OH 44122	30,000
Gracie Gottlieb	320 Melrose Ave.	Merion Station, PA 19066	30,000
Ilana Sandberg	8 Westwood Rd.	Somerville, MA 02143	30,000
Lara Rodin	356 Pumphill Gardens SW	Calgary, AB T2V 4M7, Canada	30,000
Leah Spellberg	1241 Forest Ave	Highland Park, IL 60035	30,000
Madeline Budman	1461 South Veaux Loop	Norfolk, VA 23509	30,000
Noam Spira	3240 Henry Hudson Pkwy	New York, NY 10463	30,000
Simon Luxemburg	74 Rugby Lane	South Windsor, CT 06074	30,000

MRHM, INC
EIN 13-4077880
Form 990PF Part XV, Line 3
June 30, 2020

Direct Charitable Activity Expenses of Legacy Heritage Programming IX LLC

Stipends	\$ 612,500
Consultants	22,913
Office expense	55,672
Travel and meetings	10,754
Filing fees	300
Total - To Part XV	<u>\$ 702,139</u>

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
JPMORGAN CHASE CREDIT INTEREST	445.	445.	
TOTAL TO PART I, LINE 3	445.	445.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
AIF VII PRIVATE INV (TE) LLC - DIVIDENDS	6,872.	0.	6,872.	6,872.	
AIF VII PRIVATE INV (TE) LLC - INTEREST	5,639.	0.	5,639.	5,639.	
LEGACY HERITAGE INV I LLC - DIVIDEND	584,632.	0.	584,632.	584,632.	
LEGACY HERITAGE INV I LLC - INTEREST	210,755.	0.	210,755.	210,755.	
LEGACY HERITAGE INV I LLC - TAX-EXEMPT	13,289.	0.	13,289.	0.	
LEGACY HERITAGE INV I LLC - US INTEREST	18,025.	0.	18,025.	18,025.	
TO PART I, LINE 4	839,212.	0.	839,212.	825,923.	

FORM 990-PF	OTHER INCOME		STATEMENT	3
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
AIF VII PRIVATE INV (TE) LLC - PORTFOLIO INCOME	2,229.	2,229.		
LEGACY HERITAGE INVESTORS I LLC - OTHER INCOME	15,838.	15,838.		
LEGACY HERITAGE INVESTORS I LLC - PORTFOLIO INCOME	1,510.	1,510.		
LEGACY HERITAGE INVESTORS I LLC - NET RENTAL INCOME	-4,493.	-4,493.		
LEGACY HERITAGE INVESTORS I LLC- ORDINARY GAIN	1,064,130.	1,064,130.		
LEGACY HERITAGE INVESTORS I LLC- UBTI	1,840.	0.		
TOTAL TO FORM 990-PF, PART I, LINE 11	1,081,054.	1,079,214.		

FORM 990-PF	ACCOUNTING FEES		STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
HERTZ,HERSON & COMPANY LLP	12,844.	6,422.		6,422.
TO FORM 990-PF, PG 1, LN 16B	12,844.	6,422.		6,422.

FORM 990-PF	TAXES		STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGACY HERITAGE INV - FOREIGN TAX PAID	18,439.	18,439.		0.
TO FORM 990-PF, PG 1, LN 18	18,439.	18,439.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
NEW YORK STATE DEPT OF LAW	750.	0.		750.
DELAWARE FRANCHISE TAX	25.	0.		25.
AIF VII PRIVATE INV (TE) LLC - PORTFOLIO DEDUCTIONS	10,604.	10,604.		0.
LEGACY HERITAGE INV I LLC - PORTFOLIO DEDUCTIONS	87,208.	87,208.		0.
NONDEDUCTIBLE EXPENSES	35.	0.		0.
TO FORM 990-PF, PG 1, LN 23	98,622.	97,812.		775.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT 7
DESCRIPTION		AMOUNT
AIF VII PRIVATE INV (TE) LLC - OTHER BOOK/TAX ADJUSTMENTS		67.
LEGACY HERITAGE INV I LLC - OTHER BOOK/TAX ADJUSTMENTS		12,658.
TOTAL TO FORM 990-PF, PART III, LINE 3		12,725.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT 8
DESCRIPTION		AMOUNT
AIF VII PRIVATE INV (TE) LLC - UNREALIZED LOSSES		38,704.
LEGACY HERITAGE INV I LLC - UNREALIZED LOSSES		53,506.
TOTAL TO FORM 990-PF, PART III, LINE 5		92,210.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	9
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
AIF VII PRIVATE INVESTORS (TE), LLC	COST	353,836.	217,810.
LEGACY HERITAGE INVESTORS I LLC	COST	32,505,120.	35,849,029.
TOTAL TO FORM 990-PF, PART II, LINE 13		32,858,956.	36,066,839.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	10
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
M. SAKS (THROUGH 12/19) 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	DIRECTOR 0.00	0.	0.	0.
B. GLOZNEK 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	ASSISTANT SECRETARY 0.00	0.	0.	0.
W. STERN 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	DIRECTOR 0.00	0.	0.	0.
R. KANNER 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	DIRECTOR 0.00	0.	0.	0.
S. WEXNER 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	PRES, SECY, TREAS, DIR 0.00	0.	0.	0.
M. OBERMAN (THROUGH 10/19), DEC'D 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	DIRECTOR 0.00	0.	0.	0.
G. LEVY 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	DIRECTOR 0.00	0.	0.	0.

R. AGUS 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	DIRECTOR 0.00	0.	0.	0.
D. WEISSMAN 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	DIRECTOR 0.00	0.	0.	0.
W. FEINSTEIN 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	DIRECTOR 0.00	0.	0.	0.
R. FEIT 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	DIRECTOR 0.00	0.	0.	0.
G. GRAFF 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	DIRECTOR 0.00	0.	0.	0.
B. LOPATA 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	DIRECTOR 0.00	0.	0.	0.
D. KORN 477 MADISON AVENUE, 10TH FL NEW YORK, NY 10022	TAX MATTERS OFFICER 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		<u>0.</u>	<u>0.</u>	<u>0.</u>