

Return of 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.

2011

2019

For calendar year 2019 or tax year beginning DEC 1, 2019, and ending NOV 30, 2020

Name of foundation: THE SO CHARITABLE TRUST C/O ODED ABOODI, TRUSTEE. A Employer identification number: 13-3050892. B Telephone number: (212) 641-5006. G Check all that apply: Initial return, Final return, Address change. H Check type of organization: Section 501(c)(3) exempt private foundation. I Fair market value of all assets at end of year: \$3,316,503. J Accounting method: Cash.

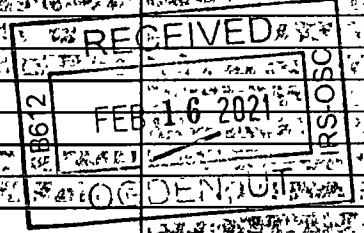
2/23

6

04

SCANNED APR 19 2021

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 (1-12), Operating and Administrative Expenses (13-26), and Net Investment Income (27).



3

<b>Part II Balance Sheets</b> <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	1,593,883.	1,371,259.	1,371,259.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶	3.		
	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>b</b> investments - corporate stock <span style="float: right;">STMT 4</span>	1,579,052.	1,579,052.	1,945,244.
	<b>c</b> investments - corporate bonds			
	11 Investments - land, buildings, and equipment: basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ _____)				
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I)	3,172,938.	2,950,311.	3,316,503.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ _____)			
23 <b>Total liabilities</b> (add lines 17 through 22)	0.	0.		
<b>Net Assets or Fund Balances</b>	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	3,172,938.	2,950,311.	
29 <b>Total net assets or fund balances</b>	3,172,938.	2,950,311.		
30 <b>Total liabilities and net assets/fund balances</b>	3,172,938.	2,950,311.		

<b>Part III Analysis of Changes in Net Assets or Fund Balances</b>			
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	3,172,938.
2 Enter amount from Part I, line 27a		2	-222,627.
3 Other increases not included in line 2 (itemize) ▶ _____		3	0.
4 Add lines 1, 2, and 3		4	2,950,311.
5 Decreases not included in line 2 (itemize) ▶ _____		5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29		6	2,950,311.

**THE SO CHARITABLE TRUST**  
**C/O ODED ABOODI, TRUSTEE**

Form 990-PF (2019)

13-3050892 Page 3

**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.)
<b>1a CAPITAL GAINS DIVIDENDS</b>			
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a 1,806.			1,806.
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) 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			1,806.
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             } <div style="float:right; text-align:right;">2</div>		1,806.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8.			3

**Part 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	215,829.	3,785,204.	.057019
2017	170,583.	4,010,814.	.042531
2016	174,319.	4,030,401.	.043251
2015	192,316.	3,803,514.	.050563
2014	322,112.	2,651,784.	.121470
2 Total of line 1, column (d)			.314834
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			.062967
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5		3,492,574.	
5 Multiply line 4 by line 3			219,917.
6 Enter 1% of net investment income (1% of Part I, line 27b)			544.
7 Add lines 5 and 6			220,461.
8 Enter qualifying distributions from Part XII, line 4			277,030.

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.

THE SO CHARITABLE TRUST  
C/O ODED ABOODI, TRUSTEE

3

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	544.
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	544.
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	544.
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	703.
b	Exempt foreign organizations - tax withheld at source	6b	0.
c	Tax paid with application for extension of time to file (Form 8868)	6c	0.
d	Backup withholding erroneously withheld	6d	0.
7	Total credits and payments. Add lines 6a through 6d	7	703.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	159.
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax <input type="checkbox"/> 159.   Refunded <input 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		
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		X

N/A

2

**THE SO CHARITABLE TRUST  
C/O ODED ABOODI, TRUSTEE**

**Part VII-A Statements Regarding Activities** *(continued)*

		Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	11		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14 The books are in care of ► <u>ODED ABOODI, TRUSTEE</u> Telephone no. ► <u>212-641-5006</u> Located at ► <u>C/O ALPINE RESOURCES LLC, P.O. BOX 5028, NEW YORK</u> ZIP+4 ► <u>10150</u>			
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16		X

**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? <span style="float:right"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>			
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <span style="float:right"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>			
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <span style="float:right"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>			
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <span style="float:right"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>			
(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)? <span style="float:right"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>			
(6) Agree to pay money or property to a government official? ( <b>Exception.</b> 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.) <span style="float:right"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>			
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here		N/A	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?	1c		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? <span style="float:right"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> If "Yes," list the years ► _____, _____, _____			
b Are there any years listed in 2a for which the foundation is <b>not</b> 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.) <span style="float:right">N/A</span>	2b		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <span style="float:right"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>			
b If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) <span style="float:right">N/A</span>	3b		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b		X

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

		Yes	No
<b>5a</b> During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b> If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here	N/A <input type="checkbox"/>	5b	
<b>c</b> 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).	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>6a</b> 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>b</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
<b>7a</b> 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>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b	
<b>8</b> 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
ODED ABOODI, C/O ALPINE RESOURCES LLC P.O. BOX 5028 NEW YORK, NY 10150	TRUSTEE 2.00	0.	0.	0.
SOLOMON M. WEISS 632 IRVINGTON AVE HILLSIDE, NJ 07205	TRUSTEE 2.00	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 N/A	
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 N/A	
2	
3 All other program-related investments. See instructions.	

Total. Add lines 1 through 3 ▶ 0.

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	2,063,079.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	1,482,625.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	56.
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	3,545,760.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	3,545,760.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	53,186.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	3,492,574.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	174,629.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	174,629.
<b>2a</b>	Tax on investment income for 2019 from Part VI, line 5	<b>2a</b>	544.
<b>b</b>	Income tax for 2019. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	544.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	174,085.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	174,085.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	174,085.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	277,030.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	<b>4</b>	277,030.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	544.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	276,486.

**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				174,085.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014	192,679.			
b From 2015	2,960.			
c From 2016				
d From 2017				
e From 2018	27,866.			
f Total of lines 3a through e	223,505.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ 277,030.				
a Applied to 2018, but not more than line 2a			0.	
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				174,085.
e Remaining amount distributed out of corpus	102,945.			
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	326,450.			
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				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)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	192,679.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	133,771.			
10 Analysis of line 9:				
a Excess from 2015	2,960.			
b Excess from 2016				
c Excess from 2017				
d Excess from 2018	27,866.			
e Excess from 2019	102,945.			

**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)

	Tax year				(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4, for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities.					
Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed					
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

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

**ODED ABOODI, C/O ALPINE RESOURCES LLC**

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  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)*

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
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)				
<b>a Paid during the year</b>				
SEE ATTACHED SCHEDULE	NONE	IRC 501(C)(3)	FOR CHARITY'S SPECIFIED SERVICES	277,030.
<b>Total</b>				<b>277,030.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				<b>0.</b>





## 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
INTEREST	10,070.	10,070.	10,070.
TOTAL TO PART I, LINE 3	10,070.	10,070.	10,070.

## 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
DIV & INT	44,355.	1,806.	42,549.	42,549.	42,549.
TO PART I, LINE 4	44,355.	1,806.	42,549.	42,549.	42,549.

## FORM 990-PF OTHER EXPENSES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISC.	22.	22.	0.	0.
TO FORM 990-PF, PG 1, LN 23	22.	22.	0.	0.

## FORM 990-PF CORPORATE STOCK STATEMENT 4

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	1,579,052.	1,945,244.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,579,052.	1,945,244.

**THE SO CHARITABLE TRUST**  
**Attachment to Form 990-PF - Contribution List 11/30/20**  
**EIN: 3050892**

Date	Num	Name	Address	Amount
<b>OA - Distributions (Cash)</b>				
12/18/2019	1957	BRUCE MUSEUM	1 Museum Drve, Greenwich, CT 06830	5,000 00
01/14/2020	1958	THE ASPEN INSTITUTE	1000 North Third Street, Aspen, CO 81611	10,000 00
01/30/2020		MEMORIAL SLOAN KETTERING	1275 York Avenue, New York, NY 10065	540 00
02/10/2020	1959	GREENWICH PROFESSIONAL FIREFIGHTERS	PO Box 372, Greenwich, CT 06836	250 00
02/12/2020		HUNTSMAN CANCER INSTITUTE (SIGMA CHI GAMMA PHI)	2000 Circle of Hope, Salt Lake City, UT 84112	1,500 00
06/03/2020	1960	MS - LI WALK	40 Marcus Drve, Suite 100, Melville, NY 11747	900 00
06/24/2020	1981	ASPEN COMMUNITY FOUNDATION	600 E Hopkins Ave , Suite 202, Aspen, CO 81611	7,500 00
07/10/2020	1962	CONGREGATION SHARITH ISRAEL	8 West 70th Street, New York, NY 10023	25,000 00
09/21/2020	985	THE LUSTGARTEN FOUNDATION	1111 Stewart Avenue, Bethpage, NY 11714	3,600 00
10/08/2020	1963	CALDWELL FOOD PANTRY	14 Park Avenue, Caldwell, NJ 07006	3,600 00
10/12/2020	EFT	IMMACULATE HEART	5515 Frankin Avenue, Los Angeles, CA 90028	540 00
10/28/2020	1984	H E L P./HNF	1751 Second Avenue, New York, NY 10128	2,700 00
10/28/2020	1965	CCH/HYDROCEPHALUS ASSOC	601 West 26th Street, Suite 325-18, New York, NY 10001	2,700 00
11/10/2020	1986	HEREDITARY DISEASE FOUNDATION	3960 Broadway, 6th Floor, New York, NY 10032	5,000 00
11/12/2020		HATZOLAH EMERGENCY AIR RESPONSE	78-32 138th Street, Flushing, New York 11367	180,000 00
<b>Total OA - Distributions (Cash)</b>				<b>248,830 00</b>
<b>SMW - Distributions (Cash)</b>				
12/29/2019	3952	LINCOLN SQUARE SYNAGOGUE	1275 York Avenue, New York NY 10065	540 00
12/29/2019	3953	CONGREGATION ADATH JESHURUN	7763 Old York Road, Elkins Park, PA 19027	126 00
12/29/2019	3955	PERFECT PET RESCUE	10737 Venice Boulevard, Los Angeles, CA 90034	360 00
12/29/2019	3954	DE WITT CLINTON SCHOLARSHIP & STUDENT AID	PO Box 566, Elmsford, NY 10523-0566	108 00
01/08/2020	3958	YOUNG ISRAEL CONGREGATION	9592 Harding Avenue, 2nd Fl , Surfside, FL 33154	180 00
01/08/2020	3958	NEW MILFORD HIGH SCHOOL	One Snyder Circle, New Milford, NJ 07646	540 00
01/08/2020	3959	YIDDISH BOOK CENTER	1021 West Street Amherst, MA 01002	360 00
01/08/2020	3960	AMERICA ISRAEL CULTURAL FOUNDATION	1140 Broadway, Suite 304, New York, NY 10001	108 00
01/08/2020	3961	SIMON WEISENTHAL CENTER	322 Eighth Avenue, Ste 1702, New York, NY 10001	108 00
01/08/2020	3962	THE CARLBACH SHUL	305 W 79th Street, New York, NY 10024	414 00
01/08/2020	3963	AMERICAN FRIENDS OF THE PHILHARMONIC	122 E 42nd Street, Suite 4507, New York, NY 10168	108 00
01/08/2020	3964	DANIA BEACH HOLOCAUST REMEMBRANCE & RESOURCE FNDTN	303 N Federal Highway Dania, FL 33004	108 00
01/08/2020	3966	BRIS AVROHOM	910 Salem Avenue, Hillside, NJ 07205	360 00
01/08/2020	3965	CHABAD AT BRANDEIS	54 Turner Street, Waltham, MA 02453	360 00
01/08/2020	3957	THE WEST POINT JEWISH CHAPEL FUND	PO Box 84, West Point, NY 10996	0 00
02/01/2020	3967	YOUNG ISRAEL CONGREGATION	9592 Harding Avenue, 2nd Fl , Surfside, FL 33154	864 00
02/01/2020	3976	CONGREGATION ADATH ISRAEL	1391 North Avenue, Elizabeth, NJ 07208	1,800 00
02/01/2020	3968	WISCONSIN INSTITUTE FOR TORAH STUDY	3288 North Lake Drve, Milwaukee, WI 53211	108 00
02/01/2020	3969	THE JERUSALEM FOUNDATION	420 Lexington Avenue, New York, NY 10170	108 00
02/01/2020	3970	THE JEWISH HISTORICAL SOCIETY	901 Route 10 East, Whippany, NJ 07981-1156	108 00
02/01/2020	3971	UNIVERSITY OF MISSOURI	407 Reynolds Alumni Center	108 00
02/01/2020	3972	MEMORIAL SLOAN KETTERING	1275 York Avenue, New York, NY 10065	108 00
02/01/2020	3973	WORLD JEWISH CONGRESS	501 Madison Avenue, New York, NY 10022	108 00
02/01/2020	3974	CAMP HASC	1563 49th Street, Brooklyn, NY 11219	540 00
02/01/2020	3975	WEILL CORNELL MEDICAL CENTER	1300 York Avenue, New York, NY 10065	108 00
02/01/2020	3977	THE NEW YORK PHILHARMONIC	10 Lincoln Center Plaza, New York, NY 10023	108 00
02/01/2020	3978	NEW YORK PUBLIC RADIO	160 Vanck Street, New York, NY 10013	180 00
02/01/2020	3979	PASSAIC CLIFRTON COMMUNITY KOLLEL CONGREGATION	147 Manetta Avenue, Passaic, NJ 07055	108 00
02/01/2020	3980	THE NEW YORK PUBLIC LIBRARY	445 Fifth Avenue, New York, NY 10016	180 00
02/01/2020	3981	B'NAI B'RITH INTERNATIONAL	1120 20th Street NW, Suite 300N, Washington, DC 20036	108 00
02/01/2020	3982	FRIENDSHIP CIRCLE INTERNATIONAL	816 Eastern Parkway, Brooklyn, NY 11213	108 00
02/23/2020	3983	YOUNG ISRAEL CONGREGATION	9592 Harding Avenue, 2nd Fl Surfside, FL 33154	250 00
03/04/2020	3989	ONE ISRAEL FUND	1120 20th Street NW, Suite 300 North, Washington, DC 20036	108 00
03/04/2020	3984	JEWISH MUSEUM OF FLORIDA	301 Washington Avenue, Miami Beach, FL 33139-6955	150 00
03/04/2020	3987	CENTRAL PARK CONSERVANCY	14 E 60th Street, New York, NY 10022	108 00
03/04/2020	3988	THIRTEEN	160 Vanck Street, New York, NY 10013	360 00
03/04/2020	3990	AMERICAN ASSOC OF BEN GURION UNIVERSITY	1001 Avenue of the Amencas, 19th Fl , New York, NY 10018	108 00
03/06/2020	3985	AMERICAN SOCIETY OF YAD VASHEM	500 Fifth Avenue, 42nd fl , New York, NY 10110-4299	126 00
03/14/2020	3988	AMER COMMITTEE FOR WEITZMAN INST OF SCI	633 Third Avenue, New York, NY 10017	108 00
04/01/2020	3993	CALIFORNIA CLUB CHABAD	825 NE 205 Terrace, North Miami Beach, FL 33179	360 00
04/01/2020	3995	NEW JERSEY PERFORMING ARTS CENTER	One Center Street, Newark, NJ 07102	108 00
04/01/2020	3997	JEWISH FAMILY SERVICE OF CENTRAL NJ	655 Westfield Avenue, Elizabeth, NJ 07208	180 00
04/01/2020	4000	NEW YORK HISTORICAL SOCIETY	170 Central Park West, New York, NY 10024	108 00
04/01/2020	4001	STATUE OF LIBERTY & ELLIS ISLAND FDTN INC	17 Battery Place, Suite 210, New York, NY 10004	108 00
04/01/2020	4003	ST BARNABAS MEDICAL CENTER	94 Old Short Hills Road, Livingston, NJ 07039	108 00
04/01/2020	4007	MUSEUM OF JEWISH HERITAGE	36 Battery Place, New York, NY 10280	108 00
04/01/2020	4009	AMERICAN MUSEUM OF NATURAL HISTORY	Central Park West at 79th Street, New York, NY 10024	118 00
04/01/2020	3992	LINCOLN SQUARE SYNAGOGUE	1275 York Avenue, New York, NY 10065	360 00
04/01/2020	3994	AMERICAN FRIENDS OF YESHIVA HAKOTEL	11 Broadway, #901, New York, NY 10004	0 00
04/01/2020	3998	MESORAH HERITAGE FOUNDATION	4401 Second Avenue, Brooklyn, NY 11232	108 00
04/01/2020	3999	NEW JERSEY SYMPHONY ORCHESTRA	60 Park Place, Suite 900, Newark, NJ 07102	108 00
04/01/2020	4002	SOLOMON R GUGGENHEIM MUSEUM	1071 Fifth Avenue, New York, NY 10128-0173	108 00
04/01/2020	4004	FRIENDS OF THE 82ND STREET Y	1395 Lexington Avenue, New York, NY 10128	108 00

**THE SO CHARITABLE TRUST**  
**Attachment to Form 990-PF - Contribution List 11/30/20**  
**EIN: 3050892**

<u>Date</u>	<u>Num</u>	<u>Name</u>	<u>Address</u>	<u>Amount</u>
04/01/2020	4005	CONGREGATION SONS OF ISRAEL	590 Madison Avenue, Lakewood, NJ 08701	108 00
04/01/2020	4008	FRIENDS OF UNITED HATZALAH	208 East 51st Street, Suite 303 New York, NY 10022	108 00
04/01/2020	3996	THE METROPOLITAN MUSEUM OF ART	1000 Fifth Avenue, New York, NY 10028	180 00
05/01/2020	4014	AMERICAN JEWISH COMMITTEE	165 West 65th Street, New York, NY 10023	108 00
05/01/2020	4013	WEST POINT CHAPEL FUND	PO Box 84, West Point, NY 10996	126 00
05/02/2020	4015	THE NEW YORK BOTANICAL GARDENS	2900 Southern Blvd , Bronx, NY 10458-5126	130 00
05/02/2020	4016	THE NEWARK MUSEUM	49 Washington Street, Newark, NJ 07102-3176	108 00
05/08/2020	4011	JEWISH NATIONAL FUND	78 Randall Avenue, Rockville Center, NY 11570	108 00
05/08/2020	4012	KEREN OR	350 Seventh Ave, Suite 701, New York, NY 10001	1,008 00
07/01/2020	4017	U S HOLOCAUST MEMORIAL MUSEUM	100 Raoul Wallenberg Place, SW, Washington, DC 20024-2126	108 00
07/01/2020	4018	YESHIVAS MEOR HATORAH OF CHICAGO	3635 W Devon Avenue, Chicago, IL 60659	180 00
07/01/2020	4020	CARNEGIE HALL FRIENDS	881 Seventh Avenue, New York, NY 10019-3210	108 00
07/01/2020	4021	AMIT	817 Broadway, New York, NY 10003	1,040 00
07/01/2020	4022	YESHIVA UNIVERSITY	500 W 185th Street, BH 725, New York, NY 10033	1,008 00
07/01/2020	4023	YESHIVA UNIVERSITY	500 W 185th Street, BH 725, New York, NY 10033	720 00
07/01/2020	4026	AMERICAN FRIENDS OF THE TEL AVIV MUSEUM	1201 Broadway, Suite 802, New York, NY 10001	0 00
07/05/2020	4024	KEREN ZICHRON HENYA	100 Forest Avenue, Lakewood, NJ 08701	1,800 00
07/05/2020	4027	THE CARLEBACH SHUL	305 W 79th Street, New York, NY 10024	360 00
08/03/2020	4028	LINCOLN SQUARE SYNAGOGUE	1275 York Avenue, New York, NY 10065	360 00
08/05/2020	4025	THE JEWISH MUSEUM	1109 Fifth Avenue, New York, NY 10128	1,008 00
08/05/2020	4029	THE MUSEUM OF THE CITY OF NEW YORK	1220 Fifth Avenue, New York, NY 10029	150 00
08/18/2020	4030	YOUNG ISRAEL CONGREGATION OF BAL HARBOUR	9592 Harding Avenue, 2nd Fl , Surfside, FL 33154	1 186 00
09/08/2020	4031	CONGREGATION ADATH JESHURUN	7763 Old York Road, Elkins Park, PA 19027	126 00
09/08/2020	4032	MIAMI FILM FESTIVAL	300 NE 2nd Avenue, Miami, FL 33132	120 00
09/08/2020	4034	YAD HENNA SARA	10 Underwood Place Ste 15, Clifton, NJ 07013	1,800 00
10/01/2020	4035	AMERICAN FRIENDS OF YESHIVA HAKOTEL	11 Broadway, #901, New York NY 10004	900 00
10/01/2020	4036	KEREN ZICHRON HENYA	100 Forest Avenue, Lakewood, NJ 08701	1,800 00
10/14/2020	4037	YIVO INSTITUTE FOR JEWISH RESEARCH	15 W 16th Street, New York, NY 10011	108 00
10/14/2020	4038	THE METROPOLITAN MUSEUM OF ART	1000 Fifth Avenue, New York, NY 10028	126 00
10/14/2020	4039	JEWISH EDUCATIONAL CENTER	330 Elmora Avenue, Elizabeth, NJ 07208	1,008 00
10/14/2020	4041	YOUNG ISRAEL CONGREGATION OF BAL HARBOUR	9592 Harding Avenue, 2nd Fl , Surfside, FL 33154	252 00
10/14/2020	4040	NCSY	4833 S Graham Street, Seattle, WA 98118	108 00
Total SMW - Distributions (Cash)				28,200 00
Total CHARITABLE CONTRIBUTIONS				277,030 00