

For calendar year 2019, or tax year beginning 12-01-2019, and ending 11-30-2020

Name of foundation H&H CHARITABLE FOUNDATION C/O HARRIET SEIF		A Employer identification number 36-3426895	
Number and street (or P.O. box number if mail is not delivered to street address) 251 EAST LINDEN AVENUE		Room/suite	B Telephone number (see instructions) (201) 567-3166
City or town, state or province, country, and ZIP or foreign postal code ENGLEWOOD, NJ 07631		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) ▶ \$ 5,660,721		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

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)	20,000			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	9,166	9,166		
	4 Dividends and interest from securities	115,641	115,641		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	190,980			
	b Gross sales price for all assets on line 6a _____ 2,023,821				
	7 Capital gain net income (from Part IV, line 2)		190,980		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	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	335,787	315,787		
	13 Compensation of officers, directors, trustees, etc.	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	239	0		239
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	11,273	6,473		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	9,060	0		9,060
	22 Printing and publications				
	23 Other expenses (attach schedule)	38,120	37,979		141
	24 Total operating and administrative expenses. Add lines 13 through 23	58,692	44,452		9,440
	25 Contributions, gifts, grants paid	178,890			178,890
	26 Total expenses and disbursements. Add lines 24 and 25	237,582	44,452		188,330
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	98,205			
	b Net investment income (if negative, enter -0-)		271,335		
c Adjusted net income (if negative, enter -0-)					

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	13,765	36,311	36,311
	2 Savings and temporary cash investments	47,872	53,344	53,344
	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)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	3,642,587	3,718,998	5,571,066
	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)	3,704,224	3,808,653	5,660,721	
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 ▶ _____)	11	6,268	
	23 Total liabilities (add lines 17 through 22)	11	6,268	
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	1,003,706	1,003,706	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28 Retained earnings, accumulated income, endowment, or other funds	2,700,507	2,798,679	
29 Total net assets or fund balances (see instructions)	3,704,213	3,802,385		
30 Total liabilities and net assets/fund balances (see instructions) .	3,704,224	3,808,653		

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	3,704,213
2 Enter amount from Part I, line 27a	2	98,205
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	3,802,418
5 Decreases not included in line 2 (itemize) ▶ _____	5	33
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	3,802,385

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	190,980
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	

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	89,609	4,890,845	0.018322
2017	267,481	5,103,185	0.052415
2016	187,910	4,872,715	0.038564
2015	273,169	4,508,982	0.060583
2014	263,361	4,869,006	0.054089

2 Total of line 1, column (d)	2	0.223973
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	0.044795
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	5,049,783
5 Multiply line 4 by line 3	5	226,205
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,713
7 Add lines 5 and 6	7	228,918
8 Enter qualifying distributions from Part XII, line 4	8	188,330

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	5,427
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	5,427
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	5,427
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	4,161
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	4,500
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	8,661
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	16
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	3,218
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax ▶ 3,218 Refunded ▶	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		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) ▶ IL		
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>HERBERT E SEIF</u> Telephone no. ▶ <u>(201) 567-3166</u>			

Located at ▶ 251 EAST LINDEN AVE ENGLEWOOD NJ ZIP+4 ▶ 07631

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	
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	
	Organizations relying on a current notice regarding disaster assistance check here.	☐		
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?	☐ Yes ☐ 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?	☐ Yes ☒ No	6b	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.			
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
HERBERT E SEIF	DIR/PRES 9.00	0	0	0
C/O H SEIF 251 LINDEN AVE ENGLEWOOD, NJ 07631				
HARRIET R SEIF	DIR/SEC/TR 9.00	0	0	0
C/O H SEIF 251 LINDEN AVE ENGLEWOOD, NJ 07631				
HYMAN MULLER	DIR/VP 0.00	0	0	0
C/O H SEIF 251 LINDEN AVE ENGLEWOOD, NJ 07631				
JONATHAN A SEIF	DIRECTOR 2.00	0	0	0
C/O H SEIF 251 LINDEN AVE ENGLEWOOD, NJ 07631				
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.				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 (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. ►		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	
2	
3	
4	

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 ►	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	4,961,176
b	Average of monthly cash balances.	1b	165,507
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	5,126,683
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	5,126,683
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	76,900
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,049,783
6	Minimum investment return. Enter 5% of line 5.	6	252,489

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	252,489
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	5,427
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	5,427
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	247,062
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	247,062
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	247,062

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	188,330
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	188,330
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	188,330

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				247,062
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			173,565	
b Total for prior years: 20____, 20____, 20____		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: ► \$ <u>188,330</u>				
a Applied to 2018, but not more than line 2a			173,565	
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.				14,765
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2019. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:	0			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
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 instructions.			0	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				232,297
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 (see instructions).	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

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(i)(3) or ☐ 4942(j)(5)

		Prior 3 years				(e) Total
		(a) 2019	(b) 2018	(c) 2017	(d) 2016	
2a	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).)

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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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	178,890
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated.

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	
Enter gross amounts unless otherwise indicated.				
1 Program service revenue:				
a _____				
b _____				
c _____				
d _____				
e _____				
f _____				
g Fees and contracts from government agencies				
2 Membership dues and assessments.				
3 Interest on savings and temporary cash investments				
		14	9,166	
4 Dividends and interest from securities.				
		14	115,641	
5 Net rental income or (loss) from real estate:				
a Debt-financed property.				
b Not debt-financed property.				
6 Net rental income or (loss) from personal property				
7 Other investment income.				
8 Gain or (loss) from sales of assets other than inventory				
		18	190,980	
9 Net income or (loss) from special events:				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue: a _____				
b _____				
c _____				
d _____				
e _____				
12 Subtotal. Add columns (b), (d), and (e).				
	0		315,787	0
13 Total. Add line 12, columns (b), (d), and (e). 13 315,787				

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

Part XVII

- | | | | | |
|---|--|----|--|----|
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees. | 1c | | No |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | | |

[illegible]

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

b If "Yes," complete the following schedule.		
(a) Name of organization	(b) Type of organization	(c) Description of relationship

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.		
	*****	2021-07-28	*****
	_____ 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	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P01008299
	JEFFREY E CALLAHAN				
	Firm's name ▶ BEDERSON LLP				Firm's EIN ▶ 22-2978848
	Firm's address ▶ 100 PASSAIC AVENUE - SUITE 310 FAIRFIELD, NJ 07004				Phone no. (973) 736-3333

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.)
NESTOR PARTNERS K-1 DISPOSITION	P	1996-05-01	2020-01-15
NESTOR PARTNERS STCG	P		
NESTOR PARTNERS SEC 1256 GAIN	P		
APPLE INC	P	2008-12-30	2020-05-05
DANAHER CORP	P	2003-12-09	2020-05-05
DANAHER CORP	P	2004-03-23	2020-05-05
DEVON ENERGY CORP	P	2004-06-08	2020-05-05
DOUBLELINE TOTAL RETURN BOND FUND	P	2015-08-19	2020-10-21
EASTMAN CHEMICAL CO	P	2010-08-25	2020-05-05
EXXON MOBIL CORP	P	1996-05-13	2020-10-21

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)
395,132		371,666	23,466
6,593			6,593
14,753			14,753
22,336		920	21,416
12,298		1,219	11,079
28,696		2,988	25,708
5,956		15,997	-10,041
35,000		35,817	-817
16,700		8,073	8,627
25,089		16,117	8,972

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	
			23,466
			6,593
			14,753
			21,416
			11,079
			25,708
			-10,041
			-817
			8,627
			8,972

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.)
FORTIVE CORP	P	2003-12-09	2020-05-13
FORTIVE CORP	P	2004-03-23	2020-05-13
GARRET MOTION INC	P	2009-10-29	2020-05-05
ISHARES RUSSELL 2000 VALUE ETF	P	2018-06-12	2020-05-05
PROCTOR & GAMBLE CO/THE	P	1997-07-22	2020-05-05
PROCTOR & GAMBLE CO/THE	P	2000-06-19	2020-05-05
STERIYCLE INC	P	2006-09-26	2020-06-15
STERIYCLE INC	P	2006-09-26	2020-06-15
THERMO FISHER SCIENTIFIC INC	P	2009-10-12	2020-10-21
UNITED PARCEL SERVICE INC	P	1999-11-09	2020-05-05

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)
19,240		3,541	15,699
10,280		1,987	8,293
226		179	47
38,957		58,508	-19,551
2,320		1,012	1,308
26,680		6,401	20,279
6,872		4,081	2,791
8,590		5,101	3,489
11,820		1,130	10,690
36,833		20,000	16,833

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	
			15,699
			8,293
			47
			-19,551
			1,308
			20,279
			2,791
			3,489
			10,690
			16,833

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.)
UNITED PARCEL SERVICE INC	P	2001-12-18	2020-05-05
WALGREENS BOOTS ALLIANCE INC	P	1998-11-13	2020-10-21
JP MORGAN VALUE ADVANTAGE FUND CLASS A M/F	P		2020-07-07
JP MORGAN VALUE ADVANTAGE FUND CLASS A M/F	P		2020-07-07
PROSHARES S&P 500 DIVIDEND ARISTOCRATS ETF	P	2018-10-09	2020-09-08
SPDR S&P DIVIDEND ETF	P		2020-10-29
DIAMOND HILL FDS LARGE CAP FD CL I SHS	P		2020-05-12
PIMCO FDS RAE WORLDWIDE LONG/SHORT	P	2019-04-11	2020-01-17
PIMCO FDS RAE WORLDWIDE LONG/SHORT	P		2020-05-12
BOSTON PARTNERS ALL-CAP VALUE FUND	P	2019-12-13	2020-05-12

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)
6,446		3,939	2,507
26,178		18,028	8,150
1,935		2,444	-509
51,544		63,405	-11,861
97,987		90,936	7,051
63,458		60,418	3,040
3,917		4,890	-973
2,700		2,806	-106
830		974	-144
2,130		2,732	-602

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	
			2,507
			8,150
			-509
			-11,861
			7,051
			3,040
			-973
			-106
			-144
			-602

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.)
VANGUARD INDEX TR MID CAP INDEX FD	P		2020-05-12
FIDELITY FUNDS FIDELITY TREASURY	P		2020-06-05
GOLDMAN SACHS TR FINL SQUARE PRIME OBLIGS	P		2020-03-18
GOLDMAN SACHS TR FINL SQUARE PRIME OBLIGS	P	2020-06-05	2020-08-31
DIAMOND HILL FDS LARGE CAP FD CL I SHS	P		2020-05-12
ISHARES MSCI EAFE ETF SMALL CAP	P		2020-05-12
PIMCO FDS RAE WORLDWIDE LONG/SHORT	P	2019-04-11	2020-05-12
BOSTON PARTNERS ALL-CAP VALUE FUND	P	2015-01-29	2020-05-12
VANGUARD INDEX FDS VANGUARD VALUE INDEX FD	P	2018-11-12	2020-05-12
GOLDMAN SACHS TR FINL SQUARE PRIME OBLIGS	P	2019-03-06	2020-03-18

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)
81,375		100,398	-19,023
120,071		120,071	0
69,908		70,000	-92
30,000		30,006	-6
24,083		24,475	-392
20,134		25,836	-5,702
24,606		30,445	-5,839
22,870		23,693	-823
22,000		24,754	-2,754
49,935		50,000	-65

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	
			-19,023
			0
			-92
			-6
			-392
			-5,702
			-5,839
			-823
			-2,754
			-65

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.)
AMERICAN AIRLINES GROUP INC COM	P	2020-06-24	2020-09-14
APPLE INC COM	P	2020-06-24	2020-07-09
APPLE INC COM	P	2020-06-24	2020-09-14
ARTISAN FUNDS HIGH INCOME ADVISOR	P		2020-06-23
DIMENSIONAL FUND ADVISORS INTL HI RELATIVE PROFITABILITY I	P	2020-03-25	2020-06-23
DIMENSIONAL FUND ADVISORS US SM CAP GROWTH INST	P	2020-03-26	2020-06-23
DXC TECHNOLOGY COMPANY COM	P	2020-06-24	2020-07-09
DUKE REALTY CORPORATION COM	P	2020-06-24	2020-09-14
FORD MOTOR CO COM	P	2020-06-24	2020-09-14
FRANKLIN RESOURCE INC COM	P	2020-06-24	2020-07-09

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)
66		67	-1
3,812		3,629	183
5,718		4,536	1,182
3,415		3,601	-186
15,143		12,201	2,942
33,647		27,261	6,386
209		216	-7
343		314	29
43		36	7
714		733	-19

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	
			-1
			183
			1,182
			-186
			2,942
			6,386
			-7
			29
			7
			-19

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.)
ISHARES INC MSCI EMERGING MARKETS MULTI	P	2020-03-26	2020-06-23
LOWES CORP COM	P	2020-06-24	2020-07-09
LOWES CORP COM	P	2020-06-24	2020-09-14
MATTHEWS INDIA INVESTOR	P	2019-12-17	2020-03-18
NORTONLIFELOCK INC COM	P	2020-06-24	2020-07-09
PVH CORPORATION COM	P	2020-06-24	2020-07-09
PIMCO INVESTMENTS INCOME INST	P		2020-06-23
PIMCO INVESTMENTS MORTGAGE OPPS & BOND I	P		2020-06-23
RELIANCE STEEL & ALUMINIUM COM	P	2020-06-24	2020-07-09
SIRIUS XM HOLDINGS INC COM	P	2020-06-24	2020-09-14

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)
12,348		10,820	1,528
715		728	-13
218		199	19
1,319		2,135	-816
719		727	-8
589		665	-76
3,051		3,221	-170
1,405		1,447	-42
810		835	-25
34		35	-1

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	
			1,528
			-13
			19
			-816
			-8
			-76
			-170
			-42
			-25
			-1

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.)
SOUTHWEST AIRLINES CO COM	P	2020-06-24	2020-09-14
T-MOBILE US INC COM	P	2020-06-24	2020-09-14
VIATRIS INC COM	P	2020-06-24	2020-11-20
VIATRIS INC COM	P	2020-06-24	2020-11-23
ZIMMER BIOMET HOLDINGS INC COM	P	2020-06-24	2020-09-14
NORWEGIAN CRUISE LINE HLDGS LT COM	P	2020-06-24	2020-09-14
ROYAL CARIBBEAN GROUP COM	P	2020-06-24	2020-09-14
ARTISAN FUNDS HIGH INCOME ADVISOR	P		2020-06-23
FIRST TRUST EXCHANGE-TRADED FU DOW JONES INTERNET INDEX FD	P	2017-11-21	2020-06-23
ISARES TRUST RUSSELL 1000 VALUE INDEX FD	P	2017-06-28	2020-06-23

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)
241		198	43
1,797		1,693	104
5		4	1
186		149	37
989		818	171
123		112	11
1,054		733	321
50,934		53,704	-2,770
24,557		15,469	9,088
5,042		5,142	-100

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	
			43
			104
			1
			37
			171
			11
			321
			-2,770
			9,088
			-100

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.)
ISHARES TRUST FTSE NAREIT REAL EST 50 IND	P	2018-10-24	2020-06-23
ISHARES TRUST MSCI USA VALUE FACTOR ETF	P	2019-01-18	2020-06-23
ISHARES TRUST MSCI USA MOMENTUM FACTOR ETF	P	2019-01-08	2020-06-23
ISHARES INC CORE MSCI EMERGING MKTS ETF	P		2020-03-23
MATTHEWS INDIA INVESTOR	P		2020-03-18
PIMCO INVESTMENTS INCOME INST	P		2020-06-23
PIMCO INVESTMENTS MORTGAGE OPPS & BOND I	P		2020-06-23
SSGA ACTIVE ETF TR SPDR DOBLELINE TOTAL RETURN	P	2017-09-01	2020-06-23
SELECT SECTOR SPDR TRUST C/WTS 28/01/21 (SECTOR SPDR)	P		2020-03-11
SPROTT PHYSICAL GOLD AND SILVE UNITS	P	2017-09-01	2020-06-23

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)
14,183		15,332	-1,149
20,559		22,127	-1,568
20,586		15,946	4,640
10,785		13,211	-2,426
10,935		17,699	-6,764
50,051		52,837	-2,786
31,405		32,343	-938
28,743		28,717	26
12,326		11,792	534
18,858		14,926	3,932

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	
			-1,149
			-1,568
			4,640
			-2,426
			-6,764
			-2,786
			-938
			26
			534
			3,932

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.)
VANECK VECTORS ETF TRUST FALLEN ANGEL HIGH YIELD BD EF	P		2020-06-23
VNGUARD VANGUARD INDUSTRIALS ETF	P	2016-06-02	2020-06-23
VANGUARD INFORMATION TECHNOLOGY ETF	P	2016-04-01	2020-06-23
VANGUARD VANGUARD MID-CAP VALUE ETF	P		2020-03-12
VANGUARD SMALL-CAP VALUE ETF	P		2020-02-26
WISDOMTREE TRUST CURRENCY HEDGED INTL EQUITY	P		2020-03-12
CASH IN LIEU	P		
STATE OF ISRAEL	P	2017-08-01	2020-08-01
CAPITAL GAINS DIVIDENDS	P		

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)
26,011		25,193	818
10,456		8,554	1,902
18,573		7,289	11,284
31,260		31,747	-487
18,539		16,017	2,522
31,256		37,696	-6,440
13			13
25,000		25,000	0
28,558			28,558

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	
			818
			1,902
			11,284
			-487
			2,522
			-6,440
			13
			0
			28,558

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 BALLET THEATER FOUNDATION 890 BROADWAY NEW YORK, NY 10003	NONE	PUBLIC	SUPPORT NATIONAL BALLET COMPANY.	1,600
AMERICAN FRIENDS OF ERETZ HEMDAH 8 SOUTH MICHIGAN AVE SUITE 605 CHICAGO, IL 60603	NONE	PUBLIC	INSTITUTE FOR ADVANCED JEWISH STUDIES.	2,500
AMERICAN FRIENDS OF LATET HUMANITARIAN AID 29 MERRILL ROAD NEWTON, MA 02459	NONE	PUBLIC	TO FIGHT POVERTY.	180
Total ▶ 3a				178,890

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 MIGDAL OHR 1560 BROADWAY NEW YORK, NY 10036	NONE	PUBLIC	CHILDRENS HOMES & SUPPORT FOR UNDERPRIVELEGED CHILDREN	900
AMIT CHILDREN49 W 37TH STREET NEW YORK, NY 10018	NONE	PUBLIC	EDUCATION AND PROGRAMS FOR NEEDY CHILDREN.	40,864
AREYVUT147 S WASHINGTON AVE BERGENFIELD, NJ 07621	NONE	PUBLIC	SERVICES TO JEWISH COMMUNITY	206
Total ▶ 3a				178,890

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>				
BERGEN FAMILY CENTER 10 BANTA PLACE HACKENSACK, NJ 07601	NONE	PUBLIC	SUPPORT FOR DISABLED INDIVIDUALS.	110
BNEI AKIVA520 8TH AVE 15TH FLOOR NEW YORK, NY 10018	NONE	PUBLIC	EDUCATIONAL SERVICES AND SCHOLARSHIPS	50,000
CHMOLPO BOX 191214 BROOKLYN, NY 11219	NONE	PUBLIC	PROVIDES MEALS FOR POOR FAMILIES	100
Total ▶ 3a				178,890

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>				
CONFERENCE OF PRESIDENTS FUND 633 THIRD AVE NEW YORK, NY 10017	NONE	PUBLIC	FIGHT ANIT-SEMITISM & EXTREMISM OUTREACH	3,000
CONG NUSACH ARI WELFARE FUND 3535 W FOSTER CHICAGO, IL 60625	NONE	PUBLIC	AID & SHELTER FOR ABUSED WOMEN	5,000
CONGREGATION AHAVATH TORAH 240 BROAD AVE ENGLEWOOD, NJ 07631	NONE	PUBLIC	SYNAGOGUE SERVICES	3,110
Total ▶ 3a				178,890

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>				
EAST HILL SYNAGOGUE 255 WALNUT STREET ENGLEWOOD, NJ 07666	NONE	PUBLIC	SYNAGOGUE CHARITY FUND	1,450
EMUNAH OF AMERICA500 7TH AVE NEW YORK, NY 10018	NONE	PUBLIC	SOCIAL WELFARE SERVICES, CHILDRENS HOMES	540
ETZION FOUNDATION 111 GALWAY PLACE TEANECK, NJ 07666	NONE	PUBLIC	FUNDING EDUCATIONAL SERVICES	32,500
Total ▶ 3a				178,890

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>				
EZRAS TORAH1540 RTE 202 POMONA, NY 10970	NONE	PUBLIC	PROVIDES FOOD & MEALS FOR THE NEEDY	360
FRIENDS OF ASOR ALBANY NY 24 DERECH HEBRON JERUSALEM 91087 IS	NONE	PUBLIC	TRAUMA & CRISIS TREATMENT CENTERS	300
FRIENDS OF BETH HATALMUD 1762-54 STREET BROOKLYN, NY 11204	NONE	PUBLIC	EDUCATIONAL SERVICES	600
Total ▶ 3a				178,890

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>				
FRIENDS OF MEIR PANIM 5316 NEW UTRECHT AVENUE BROOKLYN, NY 11204	NONE	PUBLIC	MEALS FOR NEEDY FAMILIES	1,095
FRIENDS OF MOSDOS GUR 3611 14TH AVE BROOKLYN, NY 11218	NONE	PUBLIC	SYNAGOGUE & EDUCATIONAL SERVICES	5,000
G&R FRANK FOUNDATION 58 KAWANHEE LANE WELD, ME 04285	NONE	PUBLIC	FINANCIAL AID FOR CAMP	500
Total ▶ 3a				178,890

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>				
GABRIEL PROJECT MUMBAI PO BOX 5025 BERGENFIELD, NJ 07621	NONE	PUBLIC	AID FOR PEOPLE IN SLUMS OF MUMBAI.	200
HEICHAL HATORAH70 STERLING PLACE TEANECK, NJ 07666	NONE	PUBLIC	HIGH SCHOOL EDUCATIONAL SERVICES	500
JEWISH FAMILY SERVICES 1485 TEANECK ROAD TEANECK, NJ 07666	NONE	PUBLIC	SERVICES FOR NEEDY FAMILIES	100
Total ▶ 3a				178,890

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 FEDERATION 50 EISENHOWER DRIVE PARAMUS, NJ 07652	NONE	PUBLIC	SERVICES & RESOURCES FOR THE JEWISH COMMUNITY	1,000
LEKET ISRAEL NJPO BOX 2090 TEANECK, NJ 07666	NONE	PUBLIC	PROVIDE FOOD & MEALS FOR THE NEEDY	2,672
MESORAH HERITAGE FOUNDATION 313 REGINA AVE RAHWAY, NJ 07065	NONE	PUBLIC	RESEARCH & PUBLICATION OF JUDAICA	6,000
Total ▶ 3a				178,890

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>				
NCSEJ2020 K STREET NW WASHINGTON, DC 20006	NONE	PUBLIC	PROMOTES JEWISH LIFE IN FORMER SOVIET UNION	5,000
NETWORK FOR GOOD1140 ST AVE NW WASHINGTON, DC 20036	NONE	PUBLIC	SYNAGOGUE SERVICES FOR SHIR CADASH SYNAGOGUE	515
OU JLIC11 BROADWAY NEW YORK, NY 10004	NONE	PUBLIC	ASSISTANCE WITH JEWISH LIFE ON CAMPUSES.	4,300
Total ► 3a				178,890

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>				
PEF ISRAEL ENDOWMENT FUNDS INC 630 3RD AVE RM 1501 NEW YORK, NY 10017	NONE	PUBLIC	PROVIDE RELIEF FOR, AND TO MINISTER TO THE PHYSICAL WELL-BEING OF NEEDY PERSONS IN ISRAEL.	2,500
PROJECT EZRAH95 CEDAR LANE ENGLEWOOD, NJ 07631	NONE	PUBLIC	EMPLOYMENT SERVICES & FINANCIAL ASSISTANCE TO NEEDY FAMILIES	1,140
PROJECT YECHI554 CHURCHILL ROAD TEANECK, NJ 07666	NONE	PUBLIC	FINANCIAL ASSISTANCE TO CANCER PATIENTS AND THEIR FAMILIES	500
Total ▶ 3a				178,890

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				
ROFEH CHOLIM CANCER SOCIETY 762 BEDFORD AVE BROOKLYN, NY 11205	NONE	PUBLIC	SUPPORT FOR CANCER PATIENTS	180
SHALOM TASK FORCE 500 SEVENTH AVE 8TH FLOOR NEW YORK, NY 10018	NONE	PUBLIC	TO COMBAT AND PREVENT DOMESTIC VIOLENCE AND FOSTER HEALTH AND SAFE RELATIONSHIP AND FAMILIES IN JEWISH COMMUNITIES.	500
SIMON WIESENTHAL CENTER 1399 S ROXBURY DRIVE LOS ANGELES, CA 90035	NONE	PUBLIC	FIGHTS ANTISEMITISM	200
Total ▶ 3a				178,890

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>				
SINAI SCHOOLS1485 TEANECK ROAD TEANECK, NJ 07666	NONE	PUBLIC	EDUCATION & THERAPEUTIC SERVICES FOR SPECIAL NEEDS CHILDREN	1,360
TIKVAH LAYELED322 W 52 STREET NEW YORK, NY 10019	NONE	PUBLIC	CENTER FOR REHAB AND EDUCATION OF CHILDREN WITH CEREBRAL PALSY.	108
TOMCHEI SHABBOS OF BERGEN COUNTY 1344 DICKERSON ROAD TEANECK, NJ 07666	NONE	PUBLIC	PROVIDES MEALS FOR POOR FAMILIES	1,600
Total ▶ 3a				178,890

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>				
ZAKA SEARCH & RESCUE 1405 N BROAD STREET HILLSDALE, NJ 07205	NONE	PUBLIC	SEARCH & RESCUE ORGANIZATION	100
ZIONIST ORGANIZATION OF AMERICA 633 THIRD AVE NEW YORK, NY 10017	NONE	PUBLIC	ADVOCATES FOR ISRAEL	500
Total ▶ 3a				178,890

TY 2019 Investments - Other Schedule**Name:** H&H CHARITABLE FOUNDATION

C/O HARRIET SEIF

EIN: 36-3426895**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
WF 7922	AT COST	1,546,440	1,732,053
RJ F920	AT COST	998,677	1,396,482
TD 8956	AT COST	464,184	529,345
BOA 9409	AT COST	684,697	1,888,186
STATE OF ISRAEL BONDS	AT COST	25,000	25,000

TY 2019 Legal Fees Schedule

Name: H&H CHARITABLE FOUNDATION
C/O HARRIET SEIF

EIN: 36-3426895

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	239	0		239

TY 2019 Other Decreases Schedule**Name:** H&H CHARITABLE FOUNDATION

C/O HARRIET SEIF

EIN: 36-3426895

Description	Amount
PRIOR PERIOD ADJ	33

TY 2019 Other Expenses Schedule**Name:** H&H CHARITABLE FOUNDATION

C/O HARRIET SEIF

EIN: 36-3426895**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REGISTRATION FEES	15	0		15
INVESTMENT FEES	30,588	30,588		0
DUES AND SUBSCRIPTIONS	95	0		95
OTHER EXPENSE	31	0		31
NESTOR PARTNERS EXPENSES	7,297	7,297		0
NESTOR PARTNERS FOREIGN CURRENCY LOSS	94	94		0

TY 2019 Other Liabilities Schedule**Name:** H&H CHARITABLE FOUNDATION

C/O HARRIET SEIF

EIN: 36-3426895

Description	Beginning of Year - Book Value	End of Year - Book Value
DUE TO AMEX	11	6,268

TY 2019 Taxes Schedule**Name:** H&H CHARITABLE FOUNDATION

C/O HARRIET SEIF

EIN: 36-3426895

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	6,473	6,473		0
FEDERAL TAXES	4,800	0		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to <u>www.irs.gov/Form990</u> for the latest information.	OMB No. 1545-0047
		2019
Name of the organization H&H CHARITABLE FOUNDATION C/O HARRIET SEIF		Employer identification number 36-3426895

Organization type (check one):

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
H&H CHARITABLE FOUNDATION
C/O HARRIET SEIF

Employer identification number
36-3426895

Part I**Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	HERBERT E SEIF 251 EAST LINDEN AVE ENGLEWOOD, NJ 07631	\$ 20,000	☒ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

36-3426895

[illegible]

Name of organization H&H CHARITABLE FOUNDATION C/O HARRIET SEIF	Employer identification number 36-3426895
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____ Use duplicate copies of Part III if additional space is needed.
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee