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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to *www.irs.gov/Form990PF* for instructions and the latest information.

OMB No. 1545-0052

2020

Open to Public Inspection

For calendar year 2020, or tax year beginning 05-01-2020 , and ending 04-30-2021

Name of foundation
CHARLES H GERSHENSON TR UA 081077

A Employer identification number
38-6454423

Number and street (or P.O. box number if mail is not delivered to street address) | Room/suite
39400 WOODWARD AVE NO 101

B Telephone number (see instructions)
(313) 465-7324

City or town, state or province, country, and ZIP or foreign postal code
BLOOMFIELD HILLS, MI 483045151

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)* ▶$ 4,510,745

J Accounting method: ☑ Cash ☐ Accrual ☐ Other (specify) ______
(Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here .... ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities . . .	101,338	101,338		
	5a	Gross rents				
	b	Net rental income or (loss) ______				
	6a	Net gain or (loss) from sale of assets not on line 10	179,532			
	b	Gross sales price for all assets on line 6a 1,437,704				
	7	Capital gain net income (from Part IV, line 2) . . .		179,532		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	280,870	280,870		
Operating and Administrative Expenses	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)	61,364	1,838		59,527
	b	Accounting fees (attach schedule)	9,115	4,558		4,558
	c	Other professional fees (attach schedule)	33,908	33,908		0
	17	Interest				
	18	Taxes (attach schedule) (see instructions) . . .	2,000	0		0
	19	Depreciation (attach schedule) and depletion . . .				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	106,387	40,304		64,085
	25	Contributions, gifts, grants paid	212,520			212,520
	26	**Total expenses and disbursements.** Add lines 24 and 25	318,907	40,304		276,605
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-38,037			
	b	**Net investment income** (if negative, enter -0-)		240,566		
	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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	93,856	48,958	48,958
	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)	1,047,665	1,347,040	1,336,971
	b	Investments—corporate stock (attach schedule)	776,405	759,839	1,721,597
	c	Investments—corporate bonds (attach schedule)	1,608,477	1,305,740	1,403,219
	11	Investments—land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	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)	3,526,403	3,461,577	4,510,745
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities**(add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.**			
	24	Net assets without donor restrictions			
	25	Net assets with donor restrictions			
		Foundations that do not follow FASB ASC 958, check here ▶ ☑ and complete lines 26 through 30.			
	26	Capital stock, trust principal, or current funds	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	3,526,403	3,461,577	
	29	**Total net assets or fund balances** (see instructions)	3,526,403	3,461,577	
	30	**Total liabilities and net assets/fund balances** (see instructions)	3,526,403	3,461,577	

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	3,526,403
2	Enter amount from Part I, line 27a	2	-38,037
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	3,488,366
5	Decreases not included in line 2 (itemize) ▶	5	26,789
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	3,461,577

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.)
1 a	PUBLICLY TRADED SECURITIES			
b	CAPITAL GAINS DIVIDENDS	P		
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	1,409,931		1,258,172	151,759
b	27,773			27,773
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				151,759
b				27,773
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	179,532
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

SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE

1 Reserved

(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved

2	Reserved	2	
3	Reserved.	3	
4	Reserved	4	
5	Reserved	5	
6	Reserved	6	
7	Reserved	7	
8	Reserved , ...	8	

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	Reserved			1	3,344
c	All other domestic foundations enter 1.39% 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	3,344
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	3,344
6	Credits/Payments:				
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	2,649		
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	2,649
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ 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	695
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	
11	Enter the amount of line 10 to be: **Credited to 2021 estimated tax** ▶	**Refunded** ▶		11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). *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.*	1b		No
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0 **(2)** On foundation managers. ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		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? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		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?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MI			
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? *If "No," attach explanation*	8b	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 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

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		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?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶HONIGMAN LLP Telephone no. ▶(248) 566-8300

Located at ▶39400 WOODWARD AVE SUITE 101 BLOOMFIELD HILLS MI ZIP+4 ▶483045151

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

			Yes	No
16	At any time during calendar year 2020, 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		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

				Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.				
1a	During the year did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or 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		
	Organizations relying on a current notice regarding disaster assistance check here. ▶	☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2020?.		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 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020?.	☐ 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 2020 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 2020.)*.		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 2020?		4b		No

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

				Yes	No
5a	During the year did the foundation pay or incur any amount to:				
	(1) Carry on 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			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		**6b**		No
	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			
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?		**7b**		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment 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
MAURICE S BINKOW 315 E EISENHOWER PKWY ANN ARBOR, MI 48108	TRUSTEE 1.00	0	0	0

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

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

Total number of other employees paid over $50,000 ▶ 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	4,338,089
b	Average of monthly cash balances.			1b	85,738
c	Fair market value of all other assets (see instructions).			1c	0
d	**Total** (add lines 1a, b, and c).			1d	4,423,827
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	4,423,827
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).			4	66,357
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4			5	4,357,470
6	**Minimum investment return.** Enter 5% of line 5.			6	217,874

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	217,874
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	3,344		
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b			
c	Add lines 2a and 2b.			2c	3,344
3	Distributable amount before adjustments. Subtract line 2c from line 1.			3	214,530
4	Recoveries of amounts treated as qualifying distributions.			4	0
5	Add lines 3 and 4.			5	214,530
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	214,530

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	276,605
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	276,605
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	276,605

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 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				214,530
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.			0	
b Total for prior years: 20___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2020:				
a From 2015. . . . 25,918				
b From 2016. . . . 13,837				
c From 2017. . . . 27,564				
d From 2018. . . . 75,963				
e From 2019. . . . 14,237				
f **Total** of lines 3a through e.	157,519			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ $ 276,605				
a Applied to 2019, 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 2020 distributable amount.				214,530
e Remaining amount distributed out of corpus	62,075			
5 Excess distributions carryover applied to 2020. *(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	219,594			
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 2019. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2021. 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 2015 not applied on line 5 or line 7 (see instructions)	25,918			
9 **Excess distributions carryover to 2021.** Subtract lines 7 and 8 from line 6a	193,676			
10 Analysis of line 9:				
a Excess from 2016. . . 13,837				
b Excess from 2017. . . 27,564				
c Excess from 2018. . . 75,963				
d Excess from 2019. . . 14,237				
e Excess from 2020. . . 62,075				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2020, enter the date of the ruling. . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2020	**(b)** 2019	**(c)** 2018	**(d)** 2017	
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).)

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 *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				212,520
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

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	
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					
4 Dividends and interest from securities.			14	101,338	
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	179,532	
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		280,870	0

13 **Total.** Add line 12, columns (b), (d), and (e). 13 280,870

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

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

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

Part XVII **Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash.	**1a(1)**		No
	(2) Other assets.	**1a(2)**		No
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization.	**1b(1)**		No
	(2) Purchases of assets from a noncharitable exempt organization.	**1b(2)**		No
	(3) Rental of facilities, equipment, or other assets.	**1b(3)**		No
	(4) Reimbursement arrangements.	**1b(4)**		No
	(5) Loans or loan guarantees.	**1b(5)**		No
	(6) Performance of services or membership or fundraising solicitations.	**1b(6)**		No
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.

(a) Line No.	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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.

******	2021-09-08	******
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
DORI J EGGETT		2021-09-08		P00645252
Firm's name ▶ PLANTE & MORAN PLLC				Firm's EIN ▶38-1357951
Firm's address ▶ 2601 CAMBRIDGE CT STE 500 AUBURN HILLS, MI 48326				Phone no. (248) 375-7100

Form 990PF Part XV Line 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 *Paid during the year*				
JEWISH COMMUNITY CENTER 6600 WEST MAPLE ROAD WEST BLOOMFIELD, MI 48322		PC	CAPITAL GRANTS TO SUPPORT JEWISH UNITY AND ENRICH JEWISH LIFE	9,920
TEMPLE BETH EL7400 TELEGRAPH RD BLOOMFIELD, MI 48301		PC	CAPITAL GRANTS TO SUPPORT JEWISH UNITY AND ENRICH JEWISH LIFE	50,000
THE UNIVERSITY OF MICHIGAN 3003 STATE STREET SUITE 9000 ANN ARBOR, MI 48109		PC	TO PROMOTE EDUCATION THROUGH CAPITAL GRANTS AND/OR OPERATIONAL FUNDING TO THE SCHOOL OF MUSIC, THEATRE AND DANCE, MUSCULOSKELETAL MEDICINE, AND THE UNIVERSITY MUSICAL SOCIETY, AND ACADEMIC SUPPORT FOR STUDENT ATHLETES.	89,000
Total . . . . ▶ **3a**				212,520

Form 990PF Part XV Line 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 *Paid during the year*				
WAYNE STATE UNIVERSITY 5700 CASS AVENUE SUITE 3100 DETROIT, MI 48202		PC	TO PROMOTE EDUCATION THROUGH GRANTS AND OTHER SCHOLARLY ACTIVITIES, INCLUDING A LONG-TERM ANNUAL STUDENT SCHOLARSHIP PROGRAM (FOUR $12,500 GRANTS) TO YEARLY ATTRACT AND RETAIN FOUR HIGHLY CREDENTIALED STUDENTS TO THE LAW SCHOOL WITH AN ACCOMPANYING COMMITMENT BY THE LAW SCHOOL TO MAINTAIN SUCH SCHOLARSHIPS IN SUCCEEDING YEARS BASED UPON ACADEMIC PERFORMANCE. FUNDING FOR "PLAIN ENGLISH FOR LAWYERS" PAMPHLET PROVIDED TO ALL FIRST-YEAR LAW STUDENTS AND SUPPORT FOR MEDICAL SCHOOL PROGRAM..	63,600
Total . . . . ▶ **3a**				212,520

TY 2020 Accounting Fees Schedule

Name: CHARLES H GERSHENSON TR UA 081077

EIN: 38-6454423

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	9,115	4,558		4,558

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TY 2020 General Explanation Attachment

Name: CHARLES H GERSHENSON TR UA 081077

EIN: 38-6454423

General Explanation Attachment

Identifier	Return Reference	Explanation	
1	LIST OF OFFICERS, DIRECTORS, TRUSTEES AND FOUNDATION MANAGERS:	PAGE 6, PART VIII, LINE 1	THE TRUSTEE, MR. BINKOW, IS AN ATTORNEY WITH THE LAW FIRM OFHONIGMAN LLP. THE AMOUNT PAID TO THE LAW FIRM, $61,364,INCLUDES PAYMENT FOR TRUSTEE SERVICES PERFORMED BY MR.BINKOW, AS WELL AS LEGAL FEES FOR SERVICES PERFORMED BY MR.BINKOW AND OTHER ATTORNEYS AND LEGAL ASSISTANTS, ANDINCLUDES TIME SPENT TO INSTITUTE LONGER RANGE CHARITABLEPROGRAMS AT EACH OF THE FOUR BENEFICIARY INSTITUTIONS ANDTHEIR VARIOUS COMPONENT UNITS, AND ALSO CULTURAL & HEALTHUNITS AT THE UNIVERSITY OF MICHIGAN, SECURITY ANDTECHNOLOGICAL UPGRADES AT TEMPLE BETH EL AND JEWISHCOMMUNITY CENTER.MR. BINKOW DOES NOT CHARGE FOR HIS TIME SPENT ATTENDINGEVENTS INVOLVING THE TRUST SUCH AS AT THE UNIVERSITY OFMICHIGAN SCHOOL OF MUSIC OR THE WAYNE LAW SCHOLARSHIP AWARDSFUNCTIONS OR MEETINGS WITH BENEFICIARIES NOT INVOLVINGBUSINESS MATTERS.

TY 2020 Investments Corporate Bonds Schedule

Name: CHARLES H GERSHENSON TR UA 081077

EIN: 38-6454423

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
AFLAC INC 3.625% 11/15/2024	10,382	11,147
AFLAC INC 6.45% 08/15/2040	7,387	6,981
ALABAMA PWR CO 2.8% 04/01/2025	25,650	26,536
ALTRIA GROUP INC 4.8% 02/14/2029	11,888	11,461
AMERICAN EXPRESS CO 2.65% 12/02/2022	10,037	10,473
AMERICAN EXPRESS CO 3% 10/30/2024	26,312	26,946
AMGEN INC 5.65% 06/15/2042	5,405	6,691
APPALACHIAN PWR CO 6.7% 08/15/2037	13,796	13,824
APPLE INC 2.4% 05/03/2023	20,019	21,070
APPLE INC 2.9% 09/12/2027	10,533	10,914
APPLE INC 3.25% 02/23/2026	14,733	16,578
ARCHER DANIELS MIDLAND CO 7.5% 03/15/2027	16,812	19,780
AT&T INC 3.4% 05/15/2025	9,886	11,028
AXA FINL INC 7% 04/01/2028	10,128	12,820
BECTON DICKINSON & CO 7% 08/01/2027	10,320	13,088
BERKSHIRE HATHAWAY FIN CORP 4.25% 01/15/2049	5,257	6,025
BESTFOODS 6.625% 04/15/2028	10,045	12,826
BK OF AMERICA CORP 3.3% 01/11/2023	19,723	21,199
BK OF AMERICA CORP 3.559% 04/23/2027	5,361	5,474
BK OF AMERICA CORP 5.7% 01/24/2022	25,792	26,359

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
BOEING CO 7.25% 06/15/2025	10,265	12,370
BRISTOL-MYERS SQUIBB CO 5.875% 11/15/2036	12,607	13,662
BURLINGTON NORTHN SANTA FE CP 3.05% 03/15/2022	10,010	10,216
CAPITAL ONE FINL CORP 3.3% 10/30/2024	10,386	10,828
CHEVRON CORPORATION 3.326% 11/17/2025	5,353	5,571
CHUBB INA HLDGS INC 6.8% 11/15/2031	10,162	14,463
CHUBB INA HLDGS INC 8.875% 08/15/2029	5,965	7,379
CINTAS CORP NO 2 3.7% 04/01/2027	4,799	5,604
CITIGROUP INC 3.352% 04/24/2025	20,744	21,442
CITIGROUP INC 3.875% 10/25/2023	20,620	21,739
CME GROUP INC 3% 09/15/2022	5,045	5,213
CME GROUP INC 3.75% 06/15/2028	16,663	17,091
COMCAST CORP NEW 3.4% 04/01/2030	5,760	5,443
COMCAST CORP NEW 4.15% 10/15/2028	9,883	11,528
COMM MTG TR 2012-CCRE2 3.147% 08/17/2045	20,434	20,521
CONSOLIDATED EDISON CO N Y INC 5.5% 12/01/2039	13,568	13,227
CSX CORP 5.5% 04/15/2041	6,846	6,589
CVS HEALTH CORP 2.7% 08/21/2040	4,905	4,616
DEERE & CO 8.1% 05/15/2030	10,877	14,938
DEERE JOHN CAPITAL CORP 3.45% 03/13/2025	10,021	11,024

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
DIAGEO INVT CORP 4.25% 05/11/2042	12,229	12,051
DISNEY WALT CO 4.7% 03/23/2050	5,662	6,324
DISNEY WALT CO 7.625% 11/30/2028	7,123	6,912
DOVER CORP 6.6% 03/15/2038	12,693	13,429
DUKE ENERGY CAROLINAS LLC 6.45% 10/15/2032	13,375	13,461
DUPONT DE NEMOURS INC 4.493% 11/15/2025	10,132	11,551
ELI LILLY & CO 5.5% 03/15/2027	15,434	18,473
ENTERPRISE PRODS OPER LLC 5.1% 02/15/2045	4,347	6,043
EXXON MOBIL CORP 3.567% 03/06/2045	5,582	5,226
FEDEX CORP 2.625% 08/01/2022	25,046	25,889
FIFTH THIRD BANCORP 2.55% 05/05/2027	15,055	15,895
FISERV INC 4.4% 07/01/2049	6,001	5,913
FRANKLIN RESOURCES INC 1.6% 10/30/2030	9,990	9,358
GENERAL DYNAMICS CORP 2.25% 11/15/2022	4,759	5,182
GENERAL ELECTRIC CO 6.875% 01/10/2039	6,451	7,282
GOLDMAN SACHS GROUP INC 3.85% 01/26/2027	10,636	11,163
GOLDMAN SACHS GROUP INC 4% 03/03/2024	25,781	27,475
GS MTG SECS TR 2012-GCJ9 2.773% 11/10/2045	19,396	19,915
HALLIBURTON CO 6.7% 09/15/2038	9,964	13,186
HONEYWELL INTL INC 5.7% 03/15/2037	11,867	13,332

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
INTEL CORP 3.734% 12/08/2047	11,799	11,059
INTERNATIONAL BUSINESS MACHS 7% 10/30/2025	11,162	12,584
JPMORGAN CHASE & CO 2.739% 10/15/2030	20,448	20,581
JPMORGAN CHASE & CO 3.2% 01/25/2023	15,177	15,877
JPMORGAN CHASE & CO 3.559% 04/23/2024	5,222	5,304
JPMORGAN CHASE & CO 3.875% 02/01/2024	5,111	5,509
KEYCORP MEDIUM TERM NTS BE 2.25% 04/06/2027	14,640	15,589
KIMBERLY-CLARK CORP 6.625% 08/01/2037	14,409	15,224
LINCOLN NATL CORP IND 3.625% 12/12/2026	21,098	22,206
MARKEL CORP 5% 03/30/2043	6,184	5,891
MASTERCARD INCORPORATED 3.8% 11/21/2046	6,079	5,745
MCDONALDS CORP MED TERM NT BE 1.45% 09/01/2025	20,014	20,352
METLIFE INC 3% 03/01/2025	14,470	16,247
METLIFE INC 6.5% 12/15/2032	6,945	7,179
MONDELEZ INTL INC 1.5% 05/04/2025	5,013	5,135
MONDELEZ INTL INC 2.75% 04/13/2030	5,273	5,165
NIKE INC 3.25% 03/27/2040	10,622	10,641
NORFOLK SOUTHN CORP 3.85% 01/15/2024	5,245	5,445
NORFOLK SOUTHN CORP 7.8% 05/15/2027	11,326	13,774
ORACLE CORP 2.5% 05/15/2022	19,871	20,608

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
ORACLE CORP 2.95% 05/15/2025	14,491	16,214
PARKER-HANNIFIN CORP 6.25% 05/15/2038	12,173	14,189
PEPSICO INC 7% 03/01/2029	12,154	13,737
PFIZER INC 7.2% 03/15/2039	8,378	7,932
PHILLIPS 66 4.3% 04/01/2022	15,241	15,584
POTOMAC ELEC PWR CO 3.6% 03/15/2024	25,968	26,962
PROCTER & GAMBLE CO 5.8% 08/15/2034	12,396	14,087
PROLOGIS L P 4.375% 02/01/2029	5,512	5,868
PRUDENTIAL FINL INC 6.625% 12/01/2037	7,398	7,328
QUALCOMM INC 4.3% 05/20/2047	6,176	6,030
RAYTHEON TECHNOLOGIES CORP 3.65% 08/16/2023	7,267	7,530
RAYTHEON TECHNOLOGIES CORP 5.4% 05/01/2035	13,350	12,753
SCHLUMBERGER INVT SA 3.65% 12/01/2023	24,870	27,195
SHELL INTERNATIONAL FIN BV 3.25% 05/11/2025	25,106	27,644
SPECTRA ENERGY PARTNERS LP 5.95% 09/25/2043	5,898	6,457
STRYKER CORPORATION 3.5% 03/15/2026	5,176	5,519
SYSCO CORP 6.5% 08/01/2028	15,150	18,359
TOSCO CORP 8.125% 02/15/2030	12,889	14,412
UNITED PARCEL SVCS INC 8.375% 04/01/2030	18,819	21,152
VERIZON COMMUNICATIONS INC 4.4% 11/01/2034	11,030	11,627

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
VIRGINIA ELEC & PWR CO 3.45% 09/01/2022	10,144	10,380
VIRGINIA ELEC & PWR CO 8.875% 11/15/2038	5,218	8,966
VISA INC 3.15% 12/14/2025	10,512	11,048
VISA INC 4.15% 12/14/2035	5,181	6,050
WELLS FARGO & CO 2.625% 07/22/2022	24,835	25,899
WESTLAKE CHEM CORP 3.6% 08/15/2026	21,714	21,849
WISCONSIN ELEC PWR CO 4.25% 06/01/2044	11,480	11,503
WISCONSIN PWR & LT CO 6.375% 08/15/2037	11,204	14,086

TY 2020 Investments Corporate Stock Schedule

Name: CHARLES H GERSHENSON TR UA 081077

EIN: 38-6454423

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
DELAWARE SMALL CAP VALUE INSTL CL	90,000	112,431
HARDING LOEVNER INSTL EMERGING MARKETS	57,309	85,304
MFS INTERNATIONAL INTRINSIC VALUE FUND CLASS R6	104,858	167,515
SCHWAB INTERNATIONAL INDEX	100,000	145,494
STERLING CAPITAL EQUITY INCOME INSTL	23,430	35,530
STERLING CAPITAL STRATTON SMAL L CAP VALUE I	19,888	38,830
T. ROWE PRICE MID-CAP GROWTH FUND I CLASS	34,523	136,325
TOUCHSTONE SANDS CAPITAL SELECT GROWTH FUND INSTITUTIONAL CLASS	13,206	47,741
VANGUARD 500 INDEX FUND ADMIRAL SHARES	162,682	662,412
VANGUARD EXTENDED MARKET INDEX FUND ADMIRAL SHARES	43,943	84,904
VANGUARD INTERNATIONAL GROWTH FUND ADMIRAL	110,000	205,111

TY 2020 Investments Government Obligations Schedule

Name:	CHARLES H GERSHENSON TR UA 081077
EIN:	38-6454423
US Government Securities - End of Year Book Value:	1,347,040
US Government Securities - End of Year Fair Market Value:	1,336,971
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2020 Legal Fees Schedule

Name: CHARLES H GERSHENSON TR UA 081077

EIN: 38-6454423

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ATTORNEY FEES	61,364	1,838		59,527

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TY 2020 Other Decreases Schedule

Name: CHARLES H GERSHENSON TR UA 081077

EIN: 38-6454423

Description	Amount
TIMING ADJUSTMENT	26,789

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TY 2020 Other Professional Fees Schedule

Name: CHARLES H GERSHENSON TR UA 081077

EIN: 38-6454423

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGMENT FEES	33,908	33,908		0

TY 2020 Taxes Schedule

Name: CHARLES H GERSHENSON TR UA 081077

EIN: 38-6454423

Taxes Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PAYMENTS	2,000	0		0