

Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**

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

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

OMB No 1545-0052

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning , and ending

Name of foundation EVERETT FOUNDATION, INC.		A Employer identification number 11-6038040
Number and street (or P O box number if mail is not delivered to street address) 150 EAST 69TH STREET	Room/suite	B Telephone number 212-503-8800
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10021		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 04		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) \$ 4,239,471.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
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		121,446.	120,835.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		195,044.			
b Gross sales price for all assets on line 6a 1,649,281.					
7 Capital gain net income (from Part IV, line 2)			195,044.		
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)					
11 Other income					
12 Total. Add lines 1 through 11		316,490.	315,879.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees		7,500.	5,625.		1,875.
c Other professional fees		35,304.	17,652.		17,652.
17 Interest					
18 Taxes		4,296.	567.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses		1,207.	0.		1,207.
24 Total operating and administrative expenses Add lines 13 through 23		48,307.	23,844.		20,734.
25 Contributions, gifts, grants paid		813,752.			813,752.
26 Total expenses and disbursements Add lines 24 and 25		862,059.	23,844.		834,486.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<545,569.>			
b Net investment income (if negative, enter -0-)			292,035.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	426,226.	234,979.	234,979.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations STMT 6	294,887.	200,933.	200,349.
	b Investments - corporate stock STMT 7	2,307,471.	1,388,330.	1,557,221.
	c Investments - corporate bonds STMT 8	1,661,025.	2,306,972.	2,246,922.
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	4,689,609.	4,131,214.	4,239,471.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31	23 Total liabilities (add lines 17 through 22)	0.	0.	
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ☒			
	27 Capital stock, trust principal, or current funds	4,689,609.	4,131,214.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 Total net assets or fund balances	4,689,609.	4,131,214.	
	31 Total liabilities and net assets/fund balances	4,689,609.	4,131,214.	

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 30 (must agree with end-of-year figure reported on prior year's return)	1	4,689,609.
2 Enter amount from Part I, line 27a	2	<545,569.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	4,144,040.
5 Decreases not included in line 2 (itemize) ▶ UNREALIZED APPRECIATION/DEPRECIATION	5	12,826.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,131,214.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES	P		
b PUBLICLY TRADED SECURITIES	P		
c MARKET DISCOUNT	P		
d CAPITAL GAINS DIVIDENDS			
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 175,070.		178,932.	<3,862.>
b 1,460,347.		1,274,430.	185,917.
c		875.	<875.>
d 13,864.			13,864.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			<3,862.>
b			185,917.
c			<875.>
d			13,864.
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	195,044.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{ }	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	973,567.	5,366,633.	.181411
2016	827,297.	5,330,784.	.155192
2015	933,518.	4,239,514.	.220195
2014	947,074.	7,501,786.	.126246
2013	1,071,963.	8,636,644.	.124118

2 Total of line 1, column (d)	2	.807162
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	.161432
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	4,715,368.
5 Multiply line 4 by line 3	5	761,211.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,920.
7 Add lines 5 and 6	7	764,131.
8 Enter qualifying distributions from Part XII, line 4	8	834,486.

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	2,920.
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	2,920.
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	2,920.
6 Credits/Payments:			
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a	3,120.	
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	3,120.	
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		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	200.	
11 Enter the amount of line 10 to be Credited to 2019 estimated tax	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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the 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.		X
1c Did the foundation file Form 1120-POL for this year?		X
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.		X
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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
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? If "Yes," attach the statement required by General Instruction T.		X
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?	X	
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	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. NY		
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	X	
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 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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.		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address N/A		
14 The books are in care of SARA RABI Telephone no. 212-710-1812		
Located at 685 THIRD AVENUE, NEW YORK, NY ZIP+4 10017		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ☐ and enter the amount of tax-exempt interest received or accrued during the year 15 N/A		
16 At any time during calendar year 2018, 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? Yes No		
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country 16 X		

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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. Organizations relying on a current notice regarding disaster assistance, check here N/A	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 2018? 1c		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? ☐ Yes ☒ No		
If "Yes," list the years N/A	2b	
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.) N/A		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. N/A		
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 2018 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 2018.) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018? 4b		X

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:

(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 ☒ Nob 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 **N/A**
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? **N/A** ☐ 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 ☒ Nob Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☐ Yes ☒ 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 ☒ Nob If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** ☐ Yes ☒ No8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ Yes ☒ No**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 9		0.	0.	0.

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

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

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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

0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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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	4,563,424.
b	Average of monthly cash balances	1b	223,752.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	4,787,176.
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	4,787,176.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	71,808.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,715,368.
6	Minimum investment return. Enter 5% of line 5	6	235,768.

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	235,768.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	2,920.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,920.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	232,848.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	232,848.
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	232,848.

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	834,486.
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	834,486.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,920.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	831,566.

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 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				232,848.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013	646,815.			
b From 2014	573,244.			
c From 2015	757,110.			
d From 2016	562,788.			
e From 2017	711,417.			
f Total of lines 3a through e	3,251,374.			
4 Qualifying distributions for 2018 from Part XII, line 4: \$	834,486.			
a Applied to 2017, 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 2018 distributable amount				232,848.
e Remaining amount distributed out of corpus	601,638.			
5 Excess distributions carryover applied to 2018 (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	3,853,012.			
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 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				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 2013 not applied on line 5 or line 7	646,815.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	3,206,197.			
10 Analysis of line 9				
a Excess from 2014	573,244.			
b Excess from 2015	757,110.			
c Excess from 2016	562,788.			
d Excess from 2017	711,417.			
e Excess from 2018	601,638.			

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN CIVIL LIBERTIES UNION (ACLU) 125 BROAD STREET NEW YORK, NY 10004	NONE	PC	UNRESTRICTED USE	1,000.
AMERICAN FRIENDS OF BEIT HATFUTSOT 633 THIRD AVE., 21ST FLOOR NEW YORK, NY 10017	NONE	PC	UNRESTRICTED USE	2,000.
AMERICAN FRIENDS OF GHETTO FIGH 181 THE PLAZA TEANECK, NJ 07666	NONE	PC	UNRESTRICTED USE	25,000.
AMERICAN SUPPORTERS OF YEDID 245 5TH AVENUE NEW YORK, NY 10016	NONE	PC	UNRESTRICTED USE	50,000.
ARNOLD P GOLD FOUNDATION 619 PALISADE AVE ENGLEWOOD CLIFFS, NJ 07632	NONE	PC	UNRESTRICTED USE	1,500.
Total	SEE CONTINUATION SHEET(S)			813,752.
b Approved for future payment				
NONE				
Total				0.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
BEND THE ARC 330 7TH AVE STE 1901 NEW YORK, NY 10001	NONE	PC	UNRESTRICTED USE	1,000.
CITY COLLEGE FOUNDATION 160 CONVENT AVE NEW YORK, NY 10031	NONE	PC	UNRESTRICTED USE	1,000.
CONGREGATION ANSHE CHESED 251 W 100TH ST NEW YORK, NY 10025	NONE	PC	UNRESTRICTED USE	3,000.
FJC IRAC FUND 520 EIGHTH AVENUE NEW YORK, NY 10018	NONE	PC	UNRESTRICTED USE	52,500.
FRIENDS OF ETHIOPIAN JEWS P.O. BOX 960059 BOSTON, MA 02196	NONE	PC	UNRESTRICTED USE	1,000.
FRIENDS OF ISRAEL SCI-TECH 25 WEST 45TH STREET NEW YORK, NY 10036	NONE	PC	UNRESTRICTED USE	97,058.
FRIENDS OF YEMIN ORDE 4340 E WEST HWY STE 202 BETHESDA, MD 20814	NONE	PC	UNRESTRICTED USE	9,765.
FRIENDS OF YESHIVA SIFSEI TZADI 1846 49 ST BROOKLYN, NY 11204	NONE	PC	UNRESTRICTED USE	10,000.
GREEN AMERICA 1612 K STREET NW, SUITE 600 WASHINGTON, DC 20006	NONE	PC	UNRESTRICTED USE	25,000.
HADASSAH THE WOMEN'S ZIONIST OR 50 WEST 58TH STREET NEW YORK, NY 10019	NONE	PC	UNRESTRICTED USE	50,000.
Total from continuation sheets				734,252.

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
HERITAGE CLASSIC FUND 71 LIGHTHOUSE ROAD, SUITE 4200 HILTON HEAD ISLAND, SC 29928	NONE	PC	UNRESTRICTED USE	1,000.
HILLEL FOUNDATION 2901 CAMPUS RD BROOKLYN, NY 11210	NONE	PC	UNRESTRICTED USE	5,000.
J STREET EDUCATION FUND INC PO BOX 66073 WASHINGTON, DC 20035	NONE	PC	UNRESTRICTED USE	5,000.
JEWISH BOOK COUNCIL 520 8TH AVENUE, 4TH FLOOR NEW YORK, NY 10018	NONE	PC	UNRESTRICTED USE	10,000.
JEWISH BROADCASTING SERVICE P.O. BOX 1989 FORT LEE, NJ 07024	NONE	PC	UNRESTRICTED USE	2,000.
JEWISH COUNCIL FOR PUBLIC AFFAIRS 116 E 27TH STREET NEW YORK, NY 10016	NONE	PC	UNRESTRICTED USE	750.
JEWISH FOUNDERS NETWORK 150 WEST 30TH ST. NEW YORK, NY 10001	NONE	PC	UNRESTRICTED USE	1,200.
JEWISH MUSEUM (THE) 1109 FIFTH AVENUE NEW YORK, NY 10128	NONE	PC	UNRESTRICTED USE	10,000.
JEWISH THEOLOGICAL SEMINARY OF AMERICA 3080 BROADWAY NEW YORK, NY 10027	NONE	PC	UNRESTRICTED USE	8,000.
JEWS FOR RACIAL & ECONOMIC JUSTICE 330 SEVENTH AVENUE, SUITE 1901 NEW YORK, NY 10001	NONE	PC	UNRESTRICTED USE	500.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
JUDAISM DEMOCRACY ACTION ALLIANCE 309 W. 99TH ST. #6B NEW YORK, NY 10025	NONE	PC	UNRESTRICTED USE	50,000.
LOWER EAST SIDE TENEMENT MUSEUM 103 ORCHARD ST NEW YORK, NY 10002	NONE	PC	UNRESTRICTED USE	1,530.
METROPOLITAN MUSEUM OF ART 1000 FIFTH AVENUE NEW YORK, NY 10028	NONE	PC	UNRESTRICTED USE	1,200.
MUSEUM OF MODERN ART 11 WEST 53 STREET NEW YORK, NY 10019	NONE	PC	UNRESTRICTED USE	600.
NATIONAL CENTER FOR JEWISH FILM 415 S ST# 102 MS053 WALTHAM, MA 02453	NONE	PC	UNRESTRICTED USE	6,000.
NEW ISRAEL FUND 1101 14TH STREET WASHINGTON, DC 20005	NONE	PC	UNRESTRICTED USE	244,149.
NEW PRESS 38 GREENE ST NEW YORK, NY 10013	NONE	PC	UNRESTRICTED USE	1,000.
NEW YORK BOTANICAL GARDEN BRONX RIVER PARKWAY AT FORDHAM ROAD BRONX, NY 10458	NONE	PC	UNRESTRICTED USE	50,000.
NEW YORK CIVIL RIGHTS COALITION 424 W 33RD ST NEW YORK, NY 10001	NONE	PC	UNRESTRICTED USE	2,000.
NMAAHC CONSTITUTION AVE WASHINGTON, DC 61944	NONE	PC	UNRESTRICTED USE	500.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
NY HISTORICAL SOCIETY 170 CENTRAL PARK WEST NEW YORK , NY 10024	NONE	PC	UNRESTRICTED USE	6,000.
OHR TORAH INSTITUTIONS OF ISRAEL 49 W 45TH STREET NEW YORK , NY 10036	NONE	PC	UNRESTRICTED USE	10,000.
PUBLIC CITIZEN FOUNDATION 16000 20TH STREET WASHINGTON , DC 20009	NONE	PC	UNRESTRICTED USE	1,000.
SOUTHERN POVERTY LAW CENTER 400 WASHINGTON AVE MONTGOMERY, AL 36104	NONE	PC	UNRESTRICTED USE	500.
TANGER HILLEL AT BROOKLYN COLLEGE 2901 CAMPUS RD BROOKLYN, NY 11210	NONE	PC	UNRESTRICTED USE	10,000.
TEACHERS COLLEGE 525 WEST 120TH ST. NEW YORK, NY 10027	NONE	PC	UNRESTRICTED USE	1,000.
THE ADVISORY COUNCIL ON HISTORIC PRESERVATION 401 F STREET NW, SUITE 308 WASHINGTON , DC 20001	NONE	PC	UNRESTRICTED USE	1,000.
THE DOE FUND 232 EAST 84TH STREET NEW YORK, NY 10028	NONE	PC	UNRESTRICTED USE	1,000.
THE EDUCATION ALLIANCE 197 E BROADWAY NEW YORK , NY 10002	NONE	PC	UNRESTRICTED USE	2,000.
UJA FEDERATION OF NEW YORK 130 E 59TH ST. NEW YORK, NY 10022	NONE	PC	UNRESTRICTED USE	2,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
UNION SQUARE REFORMED JUDAISM 633 3RD AVENUE NEW YORK, NY 10017	NONE	PC	UNRESTRICTED USE	35,000.
UPPER EAST SIDE HATZOLAH, INC 125 EAST 85TH STREET NEW YORK, NY 10028	NONE	PC	UNRESTRICTED USE	2,000.
VISITING NURSE SERVICE OF NY 107 EAST 70TH STREET NEW YORK, NY 10021	NONE	PC	UNRESTRICTED USE	1,000.
VIVIAN BEAUMONT THEATER INC 150 W 65TH ST NEW YORK, NY 10023	NONE	PC	UNRESTRICTED USE	10,000.
PLANNED PARENTHOOD (PPFA) 434 WEST 33RD STREET NEW YORK, NY 10001	NONE	PC	UNRESTRICTED USE	1,000.
Total from continuation sheets				

Part XVII

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

- | | | |
|---|-------|-----|
| <p>1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)(3) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?</p> <p>a Transfers from the reporting foundation to a noncharitable exempt organization of</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p>b Other transactions</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p>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.</p> | | Yes |
| | 1a(1) | |
| | 1a(2) | |
| | | |
| | 1b(1) | |
| | 1b(2) | |
| | 1b(3) | |
| | 1b(4) | |
| | 1b(5) | |
| | 1b(6) | |
| | 1c | |

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[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
N/A		

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					May the IRS discuss this return with the preparer shown below? See instr. ☒ Yes ☐ No	
	Signature of officer or trustee <i>Edith Everett</i>	Date <i>5/10/19</i>	Title PRESIDENT				
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature		Date	Check ☐ if self-employed	PTIN
	RABI, SARA		<i>Sara Rabi</i>		<i>5/9/19</i>		P00103265
	Firm's name ▶ MARKS PANETH LLP					Firm's EIN ▶ 11-3518842	
	Firm's address ▶ 685 THIRD AVENUE NEW YORK, NY 10017					Phone no. 212-503-8800	

FORM 990-PF		DIVIDENDS AND INTEREST FROM SECURITIES			STATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
EVERCORE	78,204.	13,864.	64,340.	63,729.	
EVERCORE	56,356.	0.	56,356.	56,356.	
EVERCORE - US INTEREST	750.	0.	750.	750.	
TO PART I, LINE 4	135,310.	13,864.	121,446.	120,835.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEE	7,500.	5,625.	-	1,875.
TO FORM 990-PF, PG 1, LN 16B	7,500.	5,625.		1,875.

FORM 990-PF		OTHER PROFESSIONAL FEES		STATEMENT 3	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MANAGEMENT FEE	35,304.	17,652.		17,652.	
TO FORM 990-PF, PG 1, LN 16C	35,304.	17,652.		17,652.	

FORM 990-PF		TAXES		STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL TAXES	3,729.	0.		0.
FOREIGN TAXES	567.	567.		0.
TO FORM 990-PF, PG 1, LN 18	4,296.	567.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INSURANCE	1,207.	0.		1,207.
TO FORM 990-PF, PG 1, LN 23	1,207.	0.		1,207.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT 6
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
INVESTMENT - US GOVERNMENT OBLIGATIONS-SEE STATEMENT A	X		200,933.	200,349.
TOTAL U.S. GOVERNMENT OBLIGATIONS			200,933.	200,349.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			200,933.	200,349.

FORM 990-PF	CORPORATE STOCK		STATEMENT 7
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE
INVESTMENT - CORPORATE STOCKS	1,388,330.		1,557,221.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,388,330.		1,557,221.

FORM 990-PF	CORPORATE BONDS		STATEMENT 8
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE
INVESTMENT - CORPORATE BONDS	2,306,972.		2,246,922.
TOTAL TO FORM 990-PF, PART II, LINE 10C	2,306,972.		2,246,922.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 9

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
EDITH EVERETT 150 EAST 69TH STREET NEW YORK, NY 10021	PRESIDENT/CHAIRWOMAN 40.00	0.	0.	0.
DAVID F. EVERETT 150 EAST 69TH STREET NEW YORK, NY 10021	VICE PRESIDENT/DIRECTOR 10.00	0.	0.	0.
MARK LEVENFUS 150 EAST 69TH STREET NEW YORK, NY 10021	TREASURER/DIRECTOR 10.00	0.	0.	0.
DANIEL REINGOLD 150 EAST 69TH STREET NEW YORK, NY 10021	DIRECTOR 10.00	0.	0.	0.
FRAN BLACK 150 EAST 69TH STREET NEW YORK, NY 10021	SECRETARY & DIRECTOR 10.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.