

Form **990-PF**

OMB No 1545-0052

**Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation****2018**Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection**For calendar year 2018 or tax year beginning , 2018, and ending**

THE GREENE-MILSTEIN FAMILY FOUNDATION
C/O NANCY MILSTEIN
6608 LYBROOK COURT
BETHESDA, MD 20817

A Employer identification number
01-6009341**B** Telephone number (see instructions)
301-469-6737**C** If exemption application is pending, check here ▶ ☐ *le***D** 1 Foreign organizations, check here ▶ ☐2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐**E** If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐**F** If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

G Check all that apply. ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization ☒ Section 501(c)(3) exempt private foundation *04*
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16) ▶ \$ 3,437,077.
J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify) (Part I, column (d) must be on cash basis) --

Part I Analysis of Revenue and Expenses

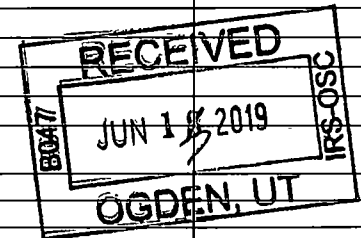
(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

(a) Revenue and expenses per books**(b)** Net investment income**(c)** Adjusted net income**(d)** Disbursements for charitable purposes (cash basis only)

- 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
5a Gross rents
b Net rental income or (loss)
6a Net gain or (loss) from sale of assets not on line 14
b Gross sales price for all assets on line 6a 540,766.
7 Capital gain net income (from Part IV, line 2)
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**13** Compensation of officers, directors, trustees, etc.**14** Other employee salaries and wages**15** Pension plans, employee benefits**16a** Legal fees (attach schedule) SEE ST 1**b** Accounting fees (attach sch) SEE ST 2**c** Other professional fees (attach sch) SEE ST 3**17** Interest**18** Taxes (attach schedule) (see instrs) SEE STM 4**19** Depreciation (attach schedule) and depletion**20** Occupancy**21** Travel, conferences, and meetings**22** Printing and publications**23** Other expenses (attach schedule)

SEE STATEMENT 5

24 Total operating and administrative expenses. Add lines 13 through 23**25** Contributions, gifts, grants paid PART XV**26** Total expenses and disbursements. Add lines 24 and 25**27** Subtract line 26 from line 12**a** Excess of revenue over expenses and disbursements**b** Net investment income (if negative, enter -0-)**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	4,724.	6,653.	6,653.
	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 (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach sch)			
		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) STATEMENT 6	49,085.	49,085.	51,464.
	b	Investments — corporate stock (attach schedule) STATEMENT 7	1,278,141.	1,315,051.	1,912,951.
	c	Investments — corporate bonds (attach schedule) STATEMENT 8	797,033.	549,598.	561,140.
Liabilities	11	Investments — land, buildings, and equipment basis			
		Less: accumulated depreciation (attach schedule)			
	12	Investments — mortgage loans			
	13	Investments — other (attach schedule) STATEMENT 9	613,281.	920,636.	904,869.
	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.)	2,742,264.	2,841,023.	3,437,077.
Net Assets or Fund Balances	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, & 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 SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. <input type="checkbox"/>			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>			
	27	Capital stock, trust principal, or current funds	2,742,264.	2,841,023.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
Net Assets or Fund Balances	30	Total net assets or fund balances (see instructions)	2,742,264.	2,841,023.	
	31	Total liabilities and net assets/fund balances (see instructions)	2,742,264.	2,841,023.	

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	2,742,264.
2	Enter amount from Part I, line 27a	2	98,759.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	2,841,023.
5	Decreases not included in line 2 (itemize)	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	2,841,023.

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)
1 a SEE STATEMENT 10				
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			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>		2	183,882.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div> <div>If gain, also enter in Part I, line 8, column (c) See instructions</div> <div>If (loss), enter -0- in Part I, line 8</div> </div>		3	0.

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	171,550.	3,620,657.	0.047381
2016	177,056.	3,489,365.	0.050742
2015	182,401.	3,565,910.	0.051151
2014	166,385.	3,550,252.	0.046866
2013	161,200.	3,339,277.	0.048274

2 Total of line 1, column (d)	2	0.244414
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	0.048883
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	3,666,706.
5 Multiply line 4 by line 3	5	179,240.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,564.
7 Add lines 5 and 6	7	181,804.
8 Enter qualifying distributions from Part XII, line 4	8	182,500.

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)

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary – see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	2,564.
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	2,564.
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	2,564.
6 Credits/Payments			
a 2018 estimated tax pmts and 2017 overpayment credited to 2018	6 a	4,528.	
b Exempt foreign organizations – tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c		
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments. Add lines 6a through 6d	7	4,528.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,964.	
11 Enter the amount of line 10 to be Credited to 2019 estimated tax <input type="checkbox"/> 1,282. Refunded <input type="checkbox"/>	11	682.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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
b 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
c 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
4 a 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?	N/A	
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	
8 a Enter the states to which the foundation reports or with which it is registered. See instructions. ME		
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

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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? Website address <u>N/A</u>	X	
14 The books are in care of <u>MONICA TOUESNARD</u> Telephone no <u>607-351-9938</u> Located at <u>129 MIDWAY RD ITHACA NY</u> ZIP + 4 <u>14850</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — check here and enter the amount of tax-exempt interest received or accrued during the year <u>N/A</u>	<input type="checkbox"/>	<input type="checkbox"/>
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?		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country <u>N/A</u>		

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
1 a 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 <input type="checkbox"/>	1 b	N/A
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?	1 c	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>		
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.)	2 b	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 <u>20__ , 20__ , 20__ , 20__</u>		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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?	4 b	X

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

5 a

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

5 b

N/A

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? If 'Yes,' attach the statement required by Regulations section 53.4945–5(d)

N/A

Yes

No

6 a

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? If 'Yes' to 6b, file Form 8870

6 b

X

7 a

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?

N/A

7 b

8

Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?

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. 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
ANDREW E. MILSTEIN 222 CRAWFORD AVE SYRACUSE, NY 13224	TRUSTEE 0	0.	0.	0.
NANCY G. MILSTEIN 6608 LYBROOK COURT BETHESDA, MD 20817	TREASURER 0	0.	0.	0.
HERBERT E. MILSTEIN 6608 LYBROOK COURT BETHESDA, MD 20817	PRESIDENT 0	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				

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 N/A	
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 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	1 a	3,717,204.
b	Average of monthly cash balances	1 b	5,340.
c	Fair market value of all other assets (see instructions)	1 c	
d	Total (add lines 1a, b, and c)	1 d	3,722,544.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	3,722,544.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	55,838.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,666,706.
6	Minimum investment return. Enter 5% of line 5	6	183,335.

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	183,335.
2 a	Tax on investment income for 2018 from Part VI, line 5	2 a	2,564.
b	Income tax for 2018 (This does not include the tax from Part VI.)	2 b	
c	Add lines 2a and 2b	2 c	2,564.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	180,771.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	180,771.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	180,771.

Part XIII 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	1 a	182,500.
b	Program-related investments — total from Part IX-B	1 b	
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)	3 a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	182,500.
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	2,564.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	179,936.

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				180,771.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years 20 , 20 , 20		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013				
b From 2014				
c From 2015				
d From 2016	2,743.			
e From 2017				
f Total of lines 3a through e	2,743.			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 182,500.				
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				180,771.
e Remaining amount distributed out of corpus	1,729.			
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	4,472.			
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 instructions			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 (see instructions)	0.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	4,472.			
10 Analysis of line 9				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016	2,743.			
d Excess from 2017				
e Excess from 2018	1,729.			

BAA

Form 990-PF (2018)

N/A

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

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(i)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income.

[illegible]

1 Information Regarding Foundation Managers:

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

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ 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

SEE STATEMENT 11

b The form in which applications should be submitted and information and materials they should include

SEE STATEMENT FOR LINE 2A

c Any submission deadlines

SEE STATEMENT FOR LINE 2A

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

SEE STATEMENT FOR LINE 2A

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 SEE ATTACHED SCHEDULE	N/A	PC	SEE ATTACHED	182,500.
Total				▶ 3 a 182,500.
b Approved for future payment				
Total				▶ 3 b

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

► **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
► **Go to www.irs.gov/Form990 for the latest information.**

OMB No 1545-0047

2018

Name of the organization **THE GREENE-MILSTEIN FAMILY FOUNDATION**
C/O NANCY MILSTEIN

Employer identification number
01-6009341

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 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 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 33-1/3% 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 (entering 'N/A' in column (b) instead of the contributor name and address), 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 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF

Schedule B (Form 990, 990-EZ, or 990-PF) (2018)

Name of organization

THE GREENE-MILSTEIN FAMILY FOUNDATION

Employer identification number

01-6009341

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	NANCY & HERBERT MILSTEIN 6608 LYBROOK CT BETHESDA, MD 20817	\$ 32,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Employer identification number

01-6009341

[illegible]

01-6009341

► \$ N/A

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
---	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee	

	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee	

	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee	

	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee	

	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee	

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THE GREENE-MILSTEIN FAMILY FOUNDATION
C/O NANCY MILSTEIN

01-6009341

5/29/19

12 55PM

STATEMENT 1
FORM 990-PF, PART I, LINE 16A
LEGAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	\$ 235.	\$ 235.		
TOTAL	\$ 235.	\$ 235.	\$ 0.	\$ 0.

STATEMENT 2
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	\$ 2,226.	\$ 2,226.		
TOTAL	\$ 2,226.	\$ 2,226.	\$ 0.	\$ 0.

STATEMENT 3
FORM 990-PF, PART I, LINE 16C
OTHER PROFESSIONAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FIDUCIARY FEES	\$ 26,648.	\$ 26,648.		
TOTAL	\$ 26,648.	\$ 26,648.	\$ 0.	\$ 0.

STATEMENT 4
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAXES	\$ 7,512.			
TOTAL	\$ 7,512.	\$ 0.	\$ 0.	\$ 0.

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THE GREENE-MILSTEIN FAMILY FOUNDATION
C/O NANCY MILSTEIN

01-6009341

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STATEMENT 5
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS - CHECKS	\$ 98.			
TOTAL	\$ 98.	\$ 0.	\$ 0.	\$ 0.

STATEMENT 6
FORM 990-PF, PART II, LINE 10A
INVESTMENTS - U.S. AND STATE GOVERNMENT OBLIGATIONS

U.S. GOVERNMENT OBLIGATIONS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
US GOVERNMENT - SEE ATTACHED	COST	\$ 49,085.	\$ 51,464.
	TOTAL	\$ 49,085.	\$ 51,464.

STATEMENT 7
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
COMMON STOCK SECURITIES - SEE ATTACHED	COST	\$ 778,244.	\$ 1,432,748.
EQUITY MUTUAL FUNDS - SEE ATTACHED	COST	70,275.	60,392.
FOREIGN STOCK - SEE ATTACHED	COST	88,424.	89,704.
EQUITY MUTUAL FUNDS FOREIGN - SEE ATTCHD	COST	378,108.	330,107.
	TOTAL	\$ 1,315,051.	\$ 1,912,951.

STATEMENT 8
FORM 990-PF, PART II, LINE 10C
INVESTMENTS - CORPORATE BONDS

CORPORATE BONDS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS - SEE ATTACHED	COST	\$ 500,310.	\$ 510,350.
FOREIGN BONDS - SEE ATTACHED	COST	49,288.	50,790.
	TOTAL	\$ 549,598.	\$ 561,140.

2018

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THE GREENE-MILSTEIN FAMILY FOUNDATION
C/O NANCY MILSTEIN

01-6009341

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STATEMENT 9
FORM 990-PF, PART II, LINE 13
INVESTMENTS - OTHER

	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
<u>OTHER PUBLICLY TRADED SECURITIES</u>			
FEDERATED GOVT OBLIG FUND	COST	\$ 92,610.	\$ 92,610.
FIXED INCOME MUTUAL FUNDS - SEE ATTACHED	COST	828,026.	812,259.
	TOTAL	\$ 920,636.	\$ 904,869.

STATEMENT 10
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	459SH JOHNSON CONTROLS	PURCHASED	VARIOUS	1/17/2018
2	600SH TRAVELERS	PURCHASED	VARIOUS	1/17/2018
3	45SH BRIGHTHOUSE	PURCHASED	VARIOUS	1/17/2018
4	50000 WACHOVIA CORP MAT	PURCHASED	VARIOUS	2/01/2018
5	1500SH GENERAL ELECTRIC	PURCHASED	VARIOUS	2/14/2018
6	500SH METLIFE	PURCHASED	VARIOUS	2/14/2018
7	50000 GENERAL ELECTRIC CAP CORP	PURCHASED	VARIOUS	3/27/2018
8	100000 GENERAL ELECTRIC CAP CORP	PURCHASED	VARIOUS	4/18/2018
9	50000 GENERAL ELECTRIC CAP CORP	PURCHASED	VARIOUS	8/15/2018
10	FR SH RESIDEO TECHNOLOGIES	PURCHASED	VARIOUS	11/05/2018
11	435SH AETNA INC	PURCHASED	VARIOUS	11/29/2018
12	FR SH CVS HEALTH CORP	PURCHASED	VARIOUS	12/07/2018
13	AETNA MERGER	PURCHASED	VARIOUS	11/29/2018
14	PRAXAIR MERGER	PURCHASED	VARIOUS	12/07/2018
15	CITIGROUP CAP XV SETTLEMENT	PURCHASED	VARIOUS	4/25/2018
16	CAPITAL GAIN DIVIDENDS			

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	18,269.		21,912.	-3,643.				\$ -3,643.
2	80,742.		26,778.	53,964.				53,964.
3	2,939.		2,313.	626.				626.
4	50,000.		49,940.	60.				60.
5	22,221.		34,513.	-12,292.				-12,292.
6	22,275.		20,182.	2,093.				2,093.
7	50,575.		49,300.	1,275.				1,275.
8	104,850.		98,700.	6,150.				6,150.
9	50,000.		49,550.	450.				450.
10	7.		2.	5.				5.
11	28,581.		3,692.	24,889.				24,889.
12	5.		2.	3.				3.
13	61,625.		0.	61,625.				61,625.
14	45,252.		0.	45,252.				45,252.
15	110.		0.	110.				110.
16								3,315.
							TOTAL	\$ 183,882.

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**THE GREENE-MILSTEIN FAMILY FOUNDATION
C/O NANCY MILSTEIN**

01-6009341

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**STATEMENT 11
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION**

NAME OF GRANT PROGRAM:

NAME: THE GREENE-MILSTEIN FAMILY FOUNDATION

CARE OF: NANCY MILSTEIN

STREET ADDRESS: 6608 LYBROOK COURT

CITY, STATE, ZIP CODE: BETHESDA, MD 20817

TELEPHONE: 301-469-6737

E-MAIL ADDRESS:

FORM AND CONTENT: LETTER GIVING DETAILS FOR USE OF FUNDS

SUBMISSION DEADLINES: NONE

RESTRICTIONS ON AWARDS: NONE

THE GREENE-MILSTEIN FAMILY FOUNDATION
EIN #01-6009341 Form 990PF YEAR: 2018
PART XV ~ SUPPLEMENTARY INFORMATION, LINE 3A, PAGE 1 OF 2

ACLU Foundation	\$ 2,000	Charitable support
ADL (Anti-Defamation League)	500	Charitable support
ALS Association	500	Charitable support
American Cancer Society	500	Charitable support
American Committee for Weitzman Institute of Science	1,000	Charitable support
American Indian College Fund	1,000	Charitable support
American Jewish Committee	1,000	Charitable support
American Red Cross MD-NCA Chapter	500	Charitable support
Amnesty International	1,000	Charitable support
Androscoggin Home Care & Hospice	1,000	Charitable support
Appleseed Foundation	10,000	Charitable support
Arena Stage	1,000	Charitable support
Bach Choir of Bethlehem	1,500	Charitable support
BCC Rescue Squad (Bethesda Chevy-Chase Rescue Squad)	1,000	Charitable support
Be The Match Foundation	1,000	Charitable support
Boston Latin School Association	3,000	Charitable support
Bradley Hills Village	500	Charitable support
Bread for the City	500	Charitable support
Brennan Center for Justice (at NYU School of Law)	1,000	Charitable support
Camp CaPella	3,000	Charitable support
Cancer Connects	1,000	Charitable support
Capital Area Food Bank	1,000	Charitable support
Central Maine Healthcare	1,500	Charitable support
Cheyenne River Youth Project	1,500	Charitable support
Children's Defense Fund	1,000	Charitable support
Children's National Hospital Foundation	1,000	Charitable support
Colby College - Henry and Fanny Greene Scholarship Fund	2,500	Scholarship
Columbia Law School	1,000	Charitable support
Congregation Tikkun v'Or	4,000	Charitable support
Cornell University	2,000	Charitable support
Cure Alzheimer's Fund	2,500	Charitable support
Defenders of Wildlife Foundation	1,000	Charitable support
Doctors Without Borders USA	1,500	Charitable support
Eastern Social Welfare Society	2,500	Charitable support
Educational Fund to Stop Gun Violence	500	Charitable support
EMU Foundation	1,000	Charitable support
Global Playground	1,000	Charitable support
Harvard College Fund	2,500	Charitable support
Harvard Hillel	250	Charitable support
Hebrew College Fund	500	Charitable support
Hebrew Home of Greater Washington DC	500	Charitable support
Heifer International	1,000	Charitable support
Hope House	250	Charitable support
Institute on Communication and Inclusion	2,000	Charitable support
Ithaca Public Education Initiative	3,000	Charitable support
J Street Education Fund	6,000	Charitable support
Jewish Council for the Aging of Greater Washington	1,500	Charitable support
Jewish Federation of Greater Washington DC	6,500	Charitable support
Jewish National Fund	500	Charitable support
Jewish Social Service Agency - Hospice	1,500	Charitable support

- continued -

THE GREENE-MILSTEIN FAMILY FOUNDATION
EIN #01-6009341 Form 990PF YEAR: 2018
PART XV ~ SUPPLEMENTARY INFORMATION, LINE 3A, PAGE 2 OF 2

Jowonio School	\$ 4,000	Charitable support
Juvenile Law Center	1,000	Charitable support
Legal Momentum	500	Charitable support
Lolly's Locks	1,000	Charitable support
MADD	300	Charitable support
Maine Initiatives	1,000	Charitable support
Make a Wish Foundation	1,500	Charitable support
My Sister's Place	500	Charitable support
National Museum of African American History and Culture	500	Charitable support
National Museum of Women in the Arts	500	Charitable support
National Symphony Orchestra - Kennedy Center	1,200	Charitable support
People for the American Way Foundation	500	Charitable support
Phillips Brooks House Association	500	Charitable support
Planned Parenthood Federation of America	1,000	Charitable support
Poplar Springs Animal Sanctuary	1,500	Charitable support
Primary Care Coalition of Montgomery County	500	Charitable support
Project Hope	1,000	Charitable support
Public Citizen Foundation	1,000	Charitable support
Re-Member	1,000	Charitable support
Round House Theatre	5,000	Charitable support
Seeds of Peace	5,000	Charitable support
Simmons College	10,000	Charitable support
SOME	1,000	Charitable support
Stand Up to Cancer	500	Charitable support
Strathmore Hall Foundation	1,500	Charitable support
Temple Beth El	1,000	Charitable support
The Harold Alfond Cancer Center/ME General Health	1,000	Charitable support
The National Center for Children and Families	500	Charitable support
The Near East Foundation	2,000	Charitable support
The Shakespeare Theatre Company	1,500	Charitable support
The Smile Train	1,500	Charitable support
The Southern Institute For Education and Research	1,000	Charitable support
The Studio Theater	25,000	Charitable support
The Washington Animal Rescue League	1,000	Charitable support
The Yachana Foundation	2,500	Charitable support
Theatre Washington	500	Charitable support
Touchstone Discussion Project	1,000	Charitable support
United States Holocaust Memorial Museum	1,000	Charitable support
Vera House Inc	1,000	Charitable support
WAMU-FM	500	Charitable support
WBJC-FM	500	Charitable support
WETA-FM	500	Charitable support
Washington Bach Consort	1,000	Charitable support
Washington Performing Arts	10,000	Charitable support
WAVAPA	500	Charitable support
Whitman-Walker Health	500	Charitable support
Woolly Mammoth Theatre	2,000	Charitable support
Zemer Chai	500	Charitable support

Net grants and contributions

\$ 182,500