Form 990-PF

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

2019

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Department of the Treasury Internal Revenue Service

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Interna	l Revenu	e Service	► Go to w	ww.irs.	<i>gov/Form990PF</i> for inst	tructions and the la	ates	t information.	Open to Public Inspection
For c	alenda	r year 2019 or	tax year beginni	ng	, 2019	, and ending		,	ALL STATES OF THE STATES OF TH
			EIN FAMILY	FOUNI	DATION		A	Employer identification 01-6009341	
129	MID	TCA TOUES: WAY RD	NARD				В	Telephone number (see 607-351-99)	
		NY 14850	<u> </u>				С	If exemption application	on is pending, check here 🕨 🗌
G C	neck a	II that apply	Initial return Final return	ŀ	Initial return of a form Amended return	ner public charity	D	1 Foreign organizations,	
H C	heck ty	pe of organiza	X Address cha	_ ::	Name change 1(c)(3) exempt private f	oundation ()	+	2 Foreign organizations here and attach compl	meeting the 85% test, check tation
I Fa		ection 4947(a)(1) nonexempt cha	arıtable		orivate foundation	E	If private foundation s under section 507(b)(1	
(fr		II, column (c), line	e 16)		Other (specify)	Ш	F	If the foundation is in under section 507(b)(1	a 60-month termination
Part	•		9,489. Revenue and	[(Рап 1,	column (d), must be on a	cash basis)		under section 507(b)(·
(Tare	E: cc ne	xpenses (Tholumns (b), (c)	ie total of amouni , and (d) may not al the amounts in		(a) Revenue and expenses per books	(b) Net investme income	ent	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
	1		ants, etc., received (attach so			<i>-</i> -			14."
	2	Check ► X if the	foundation is not required to	alladı Sılı B		•	_	-	
	3	Interest on savinos and	d temporary cash investments	s					
	4	-	erest from securities		104,805.	104,80	0.5	104,80	5.
		Gross rents			104,000.	104,00		104,00	<u> </u>
	t	D Net rental income ೦၊ (l೦೬১)							H 241
-			sale of assets not on line 10		50,574.	 			·
₹	_ [Gross sales price assets on line 6a		<u>,636.</u>				F	RECEIVED
25	7		ncome (from Part IV, In	ne 2)		50,57	7 <u>4.</u>		
Revenue	8 9	Net short-term cap Income modification				-	:	[2]	SEP 1 4 2020 9
E	-	Gross sales less returns and	1					 3 '	0
		allowances						L	_
		Less Cost of goods sold							GUEN, UT
	1 -	Gross profit or (loss) (<u>-</u>					•	
	11	Other income (atta							_
	1.0		SEE STATEM	ENT 1	1,000.	455.05		1,00	
	13	Total. Add lines 1	through 11 officers, directors, trust	ans ata	156,379. 0.	155,37	<u> 79.</u>	105,80	5.
88	14	Other employee sa		ees, etc	0.			.,,	
Ž	15	Pension plans, en	nployee benefits						•
20	16 a	Legal fees (attach	schedule) SEE	ST 2	235.	23	35.		
, X	t	Accounting fees (a			2,680.	2,68	30.		
æ,	0	Other professional fees	(attach sch) SEE	ST 4	27,318.	27,31	18.		
	17	Interest	्र चच्च	STM 5					
SCANNED FED & 2021 Operating and Administrativé Expens	18 19	Taxes (attach schedule Depreciation (atta	ch	SIM S	1,282.				
į	20	schedule) and dep Occupancy	nedon						
	21	Travel, conference	es, and meetings.						-
1 K	22	Printing and public							
Z Z	23	Other expenses (a	attach schedule)						
E E		T.4.1	-4-4						
	24	Total operating as expenses. Add lin	es 13 through 23		31,515.	30,23	33.	/	
4 6	25	Contributions, gifts, gra	מגם `	T XV	186,000.	30,23			186,000.
SCANNED FED Operating and Ad	26	Total expenses as Add lines 24 and 2	nd disbursements. 25		217,515.	30,23	33.		0. 186,000.
-	27	Subtract line 26 fr			, , , , , , , , , , , , , , , , , , , ,	,			1
	a	Excess of revenue and disbursemen			_61 13 <i>6</i>				
	6		come (if negative, ente	ar -0-1	-61,136.	125,14	16		
			me (if negative, enter			123,14	<u> </u>	105,80	5.
			, -5, 0(0)	<u> </u>					1

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Dar	+ II	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	Ena c	End of year			
rai	C III	(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value			
	1	Cash — non-interest-bearing	6,653.	2,456.	2,456.			
	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)						
	ľ	Less allowance for doubtful accounts						
	8	Inventories for sale or use	,					
	9	Prepaid expenses and deferred charges						
Assets	1	a Investments – U.S. and state government STATEMENT 6	49,085.	49,085.	50,648.			
Ą	I	b Investments — corporate stock (attach schedule) STATEMENT 7	1,315,051.	1,291,128.	2,352,105.			
•	'	c Investments — corporate bonds (attach schedule) STATEMENT 8	549,598.	411,286.	425,283.			
	11	equipment basis.		·····	1			
		Less. accumulated depreciation (attach schedule)						
		Investments – mortgage loans						
	13	Investments – other (attach schedule) STATEMENT 9	920,636.	1,025,932.	1,068,997.			
	14	Land, buildings, and equipment basis						
		Less accumulated depreciation (attach schedule)						
	15 16	Other assets (describe Total assets (to be completed by all filers — see the instructions Also, see page 1, item I)	2,841,023.	2,779,887.	3,899,489.			
	17	Accounts payable and accrued expenses			- =			
	18	Grants payable						
88	19	Deferred revenue						
≅	20	Loans from officers, directors, trustees, & other disqualified persons			2,000			
Liabilities	21	Mortgages and other notes payable (attach schedule)						
Ï	22	Other liabilities (describe			· 2 於 2 前			
	23	Total liabilities (add lines 17 through 22)	0.	0.				
		Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. ▶ □						
Bala	24	Net assets without donor restrictions						
7	25	Net assets with donor restrictions			a manager			
Net Assets or Fund Balance		Foundations that do not follow FASB ASC 958, check here X and complete lines 26 through 30.			<u>-</u>			
Ō	26	Capital stock, trust principal, or current funds	2,841,023.	2,779,887.				
Į,	27	Paid-in or capital surplus, or land, bldg, and equipment fund	, , , , , , , ,					
SS	28	Retained earnings, accumulated income, endowment, or other funds			· · · · · · · · · · · · · · · · · · ·			
¥	29	Total net assets or fund balances (see instructions)	2,841,023.	2,779,887.	2 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -			
	30	Total liabilities and net assets/fund balances (see instructions)	2,841,023.	2,779,887.	2. No. 1			
Part		Analysis of Changes in Net Assets or Fund Balance	es					
1	Total	l net assets or fund balances at beginning of year – Part II, colù of year figure reported on prior year's return)	mn (a), line 29 (must ag	ree with	2,841,023.			
		r amount from Part I, line 27a		2	-61,136.			
		increases not included in line 2 (itemize)		3	<u> </u>			
		lines 1, 2, and 3		4	2,779,887.			
5	Decre	ases 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), li	ne 29 6	2,779,887.			

(a) List and describe 2-story brick	(b) How acquired P — Purchase D — Donation	(C) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)			
1a SEE STATEMENT 10						
b						
c						
d						
e						
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sale	-	(h) Gain or ((e) plus (f) m		
a						
<u>b</u>						
d 						
	Ing gain in column (h) and owned by the	foundation on 12/31/69		40.0		
(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		(I) Gains (Col ain minus col (k), b an -0-) or Losses (fr	ut not less	
a						
b				·		
С						
d						
e						
2 Capital gain net income or (n	let capital loss) — If gain, also If (loss), en	enter in Part I, line 7 tree records and the records are records and records are records and records are records a	2		50,574	
3 Net short-term capital gain of	r (loss) as defined in sections 1222(5	5) and (6)				
If gain, also enter in Part I, li in Part I, line 8	ne 8, column (c) See instructions If	f (loss), enter -0-	3		0	
Part V Qualification Unde	er Section 4940(e) for Reduce	ed Tax on Net Investme	ent Income		-	
If 'Yes,' the foundation doesn't qua	ection 4942 tax on the distributable a alify under section 4940(e) Do not co	omplete this part	<u> </u>	Yes	X No	
Enter the appropriate amount in	n each column for each year, see the in		entries	(ab		
Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	(c) Net value of noncharitable-use asse	ets	(d) Distribution (col (b) divided		
2018	179,936.	3,666	,706.		0.049073	
2017	171,550.	3,620	,657.		0.047382	
2016	177,056.	. 3,489			0.050742	
2015	182,401.	3,565			0.051151	
2014	166,385.	3,550	,252.	Г	0.046866	
2 Total of line 1, column (d)			2		0.245213	
3 Average distribution ratio for the number of years the foundation	e 5-year base period – divide the total on has been in existence if less than	on line 2 by 5 0, or by the in 5 years	3		0.049043	
4 Enter the net value of noncha	aritable-use assets for 2019 from Par	rt X, line 5	4		3,714,562	
5 Multiply line 4 by line 3	5 Multiply line 4 by line 3					
6 Enter 1% of net investment in	ncome (1% of Part I, line 27b)		6	1,251.		
7 Add lines 5 and 6			7		183,424	
8 Enter qualifying distributions	•		8		186,000	
If line 8 is equal to or greater the Part VI instructions	nan line 7, check the box in Part VI, line	1b, and complete that part us	sing a 1% tax ra	ate See the		

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Part VI Excise Tax Based on Investment Income (Section 4940(a),		nstructions	.)		_
· · · · · · · · · · · · · · · · · · ·	ter 'N/A' on line 1				1
Date of ruling or determination letter (attach copy of letter if necessa	ry – see instructions)				
b Domestic foundations that meet the section 4940(e) requirements in Part V,	- ·	1	1	,251.	7
check here X and enter 1% of Part I, line 27b					1
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Par	rt I, line 12, col. (b)				1
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable				•	
foundations only, others, enter -0-) 3 Add lines 1 and 2	-	3		0.	-
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable found	lations only others enter -0-)	4		,251. 0.	-
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less,	, <u> </u>	5		,251.	-
6 Credits/Payments	i i			, 231.	Ī
a 2019 estimated tax pymts and 2018 overpayment credited to 2019	6a 2,564.				l
b Exempt foreign organizations — tax withheld at source	6 b				l
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	2	,564.	_
8 Enter any penalty for underpayment of estimated tax. Check here if Form	m 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	,313.	_
	313. Refunded ►	11		0.	_
Part VII-A Statements Regarding Activities		······································	 -		_
1 a During the tax year, did the foundation attempt to influence any national, state	e, or local legislation or did it	}-	Ye		-
participate or intervene in any political campaign?		-	1 a	X	-
b Did it spend more than \$100 during the year (either directly or indirectly) for politica See the instructions for the definition	l purposes?		1 Ь	,	
		-		<u> </u>	1
If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and cop or distributed by the foundation in connection with the activities	dies of any materials published			-	l
c Did the foundation file Form 1120-POL for this year?		-	1 c	X	ī
d Enter the amount (if any) of tax on political expenditures (section 4955) impor-		-		+==	Ī
(1) On the foundation > \$ 0. (2) On foundation n		0.			l
e Enter the reimbursement (if any) paid by the foundation during the year for political foundation managers >\$ 0.	expenditure tax imposed on				l
2 Has the foundation engaged in any activities that have not previously been re	ported to the IRS?	-	2	X	Ī
If 'Yes,' attach a detailed description of the activities		-	_	+*	Ī
·	common moterium anti-articles				Į
3 Has the foundation made any changes, not previously reported to the IRS, in its gov of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a cor	nformed copy of the changes	_	3	х	2
4a Did the foundation have unrelated business gross income of \$1,000 or more d			4 a	X	-
b If 'Yes,' has it filed a tax return on Form 990-T for this year?			4 b	N/A	•
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?			5	X	_
If 'Yes,' attach the statement required by General Instruction T		<u> </u>			ĺ
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945)	5) satisfied either	ļ			l
By language in the governing instrument, or					l
By state legislation that effectively amends the governing instrument so that no m	andatory directions that conflict				
with the state law remain in the governing instrument?		_	6	X	_
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Par		_	7 X	<u> </u>	7
8a Enter the states to which the foundation reports or with which it is registered. See in	nstructions -				ĺ
ME					١
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney (or designate) of each state as required by <i>General Instruction G?</i> If 'No,' attach explanation	General		8b X	_	ļ
		4040()(5)		-	ì
9 Is the foundation claiming status as a private operating foundation within the for calendar year 2019 or the tax year beginning in 2019? See the instructions	meaning or section 4942()(3) or some some for Part XIV If 'Yes,' complete	+542()(5) _ Part XIV	9	X	į
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attact				- 	-
and addresses	———————		10	X	_
AA		Form	n 990-PF	(2019)	-

BAA

	n 990-PF (2019) THE GREENE-MILSTEIN FAMILY FOUNDATION rt VII-A Statements Regarding Activities (continued)	01-	600934	1	F	age 5
				<u> </u>	Yes	No
"	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		Х
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified per advisory privileges? If 'Yes,' attach statement See instructions	son had		12		,,
13	Did the foundation comply with the public inspection requirements for its annual returns and exemptic	n annlica	tion?	13	Х	X
	Website address N/A	паррііса	(1011	15		
14		e no 🕨	607-3	 51-9	 938	:
	Located at ► 129 MIDWAY RD ITHACA NY ZIP + 4 •					
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here.			N/A	•	
	and enter the amount of tax-exempt interest received or accrued during the year	•	15			N/A
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority bank, securities, or other financial account in a foreign country?	over a		16	Yes	No X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country	•				
Pai	rt 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?	Yes	X No	'		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes	XNo			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	X No	ľ		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	X No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available	U				
	for the benefit or use of a disqualified person)?	Yes	X No			
	(6) Agree to pay money or property to a government official? (Exception Check 'No' if the					
	(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	□v				
	of government service, if terminating within 90 days)	Yes	X No			
t	of 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 instruction	ר 5		1 ь	N	/A
	Organizations relying on a current notice regarding disaster assistance, check here	•	П			
(Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts		<u> </u>			
	that were not corrected before the first day of the tax year beginning in 2019?	'		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 2019, did the foundation have any undistributed income (Part XIII, lines 6d and		_			:
	6e) for tax year(s) beginning before 2019?	Yes	X No	i i		
	If 'Yes,' list the years ► 20 , 20 , 20 , 20			1		
t	Are there any years listed in 2a for which the foundation is not applying the provisions of section 494			,		
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942 all years listed, answer 'No' and attach statement — see instructions)	(a)(2) to		2 b	N	\ /A
c	of 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				,	
3 a	Did the foundation hold more than a 2% direct or indirect interest in any business	_	_			
	enterprise at any time during the year?	Yes	X No			
t	of 'Yes,' did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation					
	or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approve by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or	ed			!	
	(3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019)			3 ь	N	/A
4 -	-				IA	, <u>n</u>
48	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			4 a		Х
	Did the foundation make any investment as a second of the first Day 1000 Hz to 11					
t	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of					
	the tax year beginning in 2019?			4 b		Х

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Part VII-B Statements Regarding Activit		1 4720 May Be Req	uired (continued	<u>) </u>	,,				
5 a During the year, did the foundation pay or incur a	•					Yes	No		
(1) Carry on propaganda, or otherwise attempt	_		Yes	X No	i				
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	lic election (see section ation drive?	1 4955); or to carry	Yes	X No					
(3) Provide a grant to an individual for travel,	study, or other similar	X No	ì						
(4) Provide a grant to an organization other than in section 4945(d)(4)(A)? See instructions	a charitable, etc , organi	zation described	Yes	X No					
(5) Provide for any purpose other than religio educational purposes, or for the prevention	us, charitable, scientific in of cruelty to children	X No							
b If any answer is 'Yes' to 5a(1)—(5), did any of described in Regulations section 53 4945 or in a constructions		5 b	N	/A					
Organizations relying on a current notice rega	rding disaster assistanc	ce, check here	•						
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon	N/A Yes	— ☐ No							
If 'Yes,' attach the statement required by Regi									
6a Did the foundation, during the year, receive at on a personal benefit contract?	X No	6 b		X					
If 'Yes' to 6b, file Form 8870	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If 'Yes' to 6b, file Form 8870								
7a At any time during the tax year, was the found	X No								
b If 'Yes,' did the foundation receive any proceed	N/A	7 b							
8 Is the foundation subject to the section 4960 tax of	V								
or excess parachute payment(s) during the ye			Yes	X No					
Part VIII Information About Officers, D and Contractors				d Empl	oyees	5,			
1 List all officers, directors, trustees, and found	_		(d) Contributions to						
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	employee benef plans and deferre compensation	_{it} (e) 5	(e) Expense account other allowances				
EE STATEMENT 11									
		0.	0	•			0.		
	,								
- 									
2 Compensation of five highest-paid employees (of	her than those included	pn line 1 — see instruction	ns). If none, enter 'NO	NE,					
(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 benefi plans and deferre compensation	t (e) E	xpense other al	e acce lowar	ount, ices		
NONE			_ '						
		-	- "						
				-					
				•					
otal number of other employees hald over \$50,000	·			▶					

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	and Contractors (continued)		
3 F	ive highest-paid independent contractors for professional services. See in		
	(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE			· · · · · ·
		•	
lotal n	umber of others receiving over \$50,000 for professional services		0
Part I	X-A Summary of Direct Charitable Activities		
			<u> </u>
List the f organizat	oundation's four largest direct charitable activities during the tax year. Include relevant statistical ions and other beneficiaries served, conferences convened, research papers produced, etc	information such as the number of	Expenses
1 N	I/A		
2 _			
_			
_			
3 _			
_			
_		<u>-</u>	
4 _			
_			
D-41	V D C		
	X-B Summary of Program-Related Investments (see Instruction et the two largest program-related investments made by the foundation during the		Amount
1 1	e the two largest program-related investments made by the foundation during the	tax year off lifes 1 and 2	Amount
' <u>r</u>	1 <u>/ A</u>		
_			
2 -			
- -		- 	
-		- 	
All oth	er program-related investments. See instructions.		
3		İ	
_		- 	
-			
Total. /	Add lines 1 through 3	•	0.
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see instructions.)	oreign to	oundations,
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	3,765,657.
b Average of monthly cash balances	1 b	5,472.
c Fair market value of all other assets (see instructions)	1 c	
d Total (add lines 1a, b, and c)	1 d	3,771,129.
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	3,771,129.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	56,567.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,714,562.
6 Minimum investment return. Enter 5% of line 5	6	185,728.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private oper and certain foreign organizations, check here ☐ and do not complete this part.)	atıng fou	undations
1 Minimum investment return from Part X, line 6	1	185,728.
2a Tax on investment income for 2019 from Part VI, line 5 2a 1,251	. 🗆	
b Income tax for 2019 (This does not include the tax from Part VI)		
c Add lines 2a and 2b	2 c	1,251.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	184,477.
4 Recoveries of amounts treated as qualifying distributions	4	1,000.
5 Add lines 3 and 4	5	185,477.
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	185,477.
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	1 a	186,000.
b Program-related investments — total from Part IX-B	1 b	100,000.
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)	3ь	
4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	186,000.
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	1,251.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	184,749.
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the fo qualifies for the section 4940(e) reduction of tax in those years	undation	
ΒΔΔ		Form 990-PF (2019)

Form **990-PF** (2019

Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1	Distributable amount for 2019 from Part XI, line 7				105 477
2	Undistributed income, if any, as of the end of 2019:		<u> </u>	<u> </u>	185,477.
	Enter amount for 2018 only			0.	
	Total for prior years 20 , 20 , 20		0.	Ŭ.	
	Excess distributions carryover, if any, to 2019		<u> </u>		
	From 2014				
t	From 2015	1			
(From 2016 2,743.	j .			
	From 2017				
•	From 2018 1, 729.				
f	Total of lines 3a through e	4,472.	-		
4	Qualifying distributions for 2019 from Part		,		
	XII, ine 4 ► \$ 186,000.				
ä	Applied to 2018, but not more than line 2a			0.	
ŧ	Applied to undistributed income of prior years (Election required — see instructions)		0.		
(Treated as distributions out of corpus				
	(Election required – sec instructions)	0	,		
	Applied to 2019 distributable amount				185,477.
	Remaining amount distributed out of corpus.	<u>523.</u>	· • • • • • • • • • • • • • • • • • • •	/**	
5	Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.	•	:	0.
6	Enter the net total of each column as				
	indicated below:				
7	Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,995.			
t	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.		
c	Subtract line 6c from line 6b Taxable				
	amount - see instructions	-	0.		
е	Undistributed income for 2018 Subtract line 4a from	1			
	line 2a Taxable amount — see instructions			0.	
f	Undistributed income for 2019. Subtract lines				
	4d and 5 from line 1 This amount must be distributed in 2020				^
7	Amounts treated as distributions out of	1			0.
•	corpus to satisfy requirements imposed by				
	section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions)	0.			
_	,				
ಶ	Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)	0.		, ,,,, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Maria satu ta
9	Excess distributions carryover to 2020.		1 - 1997 1 - 1997 1 - 1997 1 - 1997 1 - 1997	max incompo i sang internation i despe	74 (E. 1920)
3	Subtract lines 7 and 8 from line 6a	4,995.	,	. ,	~
10	Analysis of line 9:	,			
а	Excess from 2015				
	Excess from 2016 2,743.	_ ,		-	
C	Excess from 2017	,	1 to 12 7	()	17.7
d	Excess from 20181 , 729_		•		· · · ·
е	Excess from 2019 523.		-		

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Form **990-PF** (2019)

Form 990-PF (2019) THE GREENE-MILSTEIN FAMILY FOUNDATION 01-6009341								
Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)								
1 a If the foundation has received a ruling or determined is effective for 2019, enter the date of the								
b Check box to indicate whether the foundar		rating foundation o		4942(j)(3) or	4942(j)(5)			
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year	(h) 2010	Prior 3 years	(-1) 2016	(e) Total			
investment return from Part X for each year listed	(a) 2019	(b) 2018	(c) 2017	(d) 2016				
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								
 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								
 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	(0)			45 000	•			
<u>Part'XVi</u> Supplementary Information assets at any time during th	(Complete this e vear — see in:	part only if the structions.)	foundation, had	\$5,000 or more	an			
1 Information Regarding Foundation Manag	gers:	•						
a List any managers of the foundation who have close of any tax year (but only if they have NONE	e contributed more the contributed more t	an 2% of the total co than \$5,000) (See	ontributions received b section 507(d)(2))	y the foundation bef	ore the			
b List any managers of the foundation who own	10% or more of the	stock of a corporatio	n (or an equally large	portion of the owner	ship of			
a partnership or other entity) of which the NONE	foundation has a 10)% or greater inter	est		·			
2 Information Regarding Contribution, Grant, (Gift, Loan, Scholarsh	ip, etc., Programs:						
Check here if the foundation only ma requests for funds If the foundation make								
2a, b, c, and d See instructions a The name, address, and telephone number of	email address of the	e person to whom an	polications should be a	ddressed				
a the harrey dearests, and telephone harrison of	ciriaii addi ooo oi ala	porcon to whom op		uu, 0000u				
SEE STATEMENT 12								
b The form in which applications should be s	submitted and infori	mation and materia	als they should includ	le				
SEE STATEMENT FOR LINE 2A								
c Any submission deadlines								
SEE STATEMENT FOR LINE 2A								
d Any restrictions or limitations on awards, s	such as by geograph	nical areas, charita	ble fields, kinds of in	stitutions, 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 If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Purpose of grant or contribution status of **Amount** recipient Name and address (home or business) a Paid during the year N/A PC SEE ATTACHED SEE ATTACHED SCHEDULE 186,000. Total 3 a 186,000. b Approved for future payment 3 b

Total

	I-A Analysis of income-rioducing	, , , , , , , , , , , , , , , , , , , 	husiness income	Fueluded by		
-	as amounts unless otherwise indicated	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions)
a	•			T-12-1		
b				<u> </u>		
с —				 		
d	 -					
е			· ·	+		·
f						
g Fees	s and contracts from government agencies					
-	nbership dues and assessments					
3 Intere	est on savings and temporary cash investments		_		·	
4 Divid	dends and interest from securities			14	104,805.	
5 Net	rental income or (loss) from real estate		2 - 12			
a Debi	t-financed property					
b Not	debt-financed property					
6 Net re	ental income or (loss) from personal property					
7 Othe	er investment income					
8 Gain	or (loss) from sales of assets other than inventory					50,574.
9 Net	income or (loss) from special events		. <u> </u>			
10 Gros	ss profit or (loss) from sales of inventory					
11 Othe	er revenue					
a REC	COVERIES OF QUAL DISTRI		•			1,000.
b						
c						
d						
е		ļ		_		
	total Add columns (b), (d), and (e)				104,805.	51,574.
	I. Add line 12, columns (b), (d), and (e)				13	156,379.
	sheet in line 13 instructions to verify calculation				- .	
	I-B Relationship of Activities to the	•		• •		
Line No. ▼	Explain below how each activity for which in accomplishment of the foundation's exempt	ncome is reported purposes (other	ed in column (e) of er than by providing	Part XVI-A co	ontributed importantly th purposes) (See in	y to the istructions)
N/A						
			*:**			
						
-	-					
-						
					· · · · · · · · · · · · · · · · · · ·	
		.				
				·		
						·
			···· <u> </u>			
-		 	· -	_		
						<u></u>
		-				
_						
-		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~				

Rart/XVIII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

		<u> </u>													
d	old the organizates lescribed in second	ction 501(c	:) (other thar	tly engage n section 50	ın any of 01(c)(3) c	the follow organization	ing wit	h any o in section	ther organizati on 527,	on				Yes	No
a T	ransfers from	the reporting	ng foundatio	n to a none	charitable	exempt o	rganıza	ation of				,	i		
(1) Cash												1 a (1)		Х
(Other asset	ts											1 a (2)		Χ_
	Other transaction	-													
•	1) Sales of as				•								1 b (1)		<u>X</u>
•	2) Purchases					anızatıon							1 b (2)		X_
•	3) Rental of fa		•	other asset	S								1 b (3)		X_
•	(4) Reimbursement arrangements (5) Loans or loan guarantees												1 b (4)	<u> </u>	Х
•	•	•											1 b (5)	<u> </u>	Х
•	6) Performand			•		-							1 b (6)		X
c >	sharing of facili	ities, cquip	ment, mailir	ig lists, oth	er assets	, or paid e	mploye	ees.				Į.	1 c	L	_X_
d II th a	the answer to ne goods, other ny transaction	any of the assets, or s or sharing	e above is 'Y services giver arrangemen	es,' comple to by the repond t, show in	ete the foorting four	llowing sch dation If the	nedule he foun ie of th	Colum dation re	n (b) should al eceived less tha s, other assets	ways sh in fair m , or ser	now the larket v	e fair m alue in eceived	narket val d	ue of	
(a) Line		ount involved		ame of noncha					Description of tra					ngemen	ts
N/A															
	,														
			_												
			ļ .												
			<u> </u>			<u>.</u>									
													.		
d	the foundation escribed in sec	ction 501(c)) (other than	section 50	or related 01(c)(3))	to, one or n or in sectio	nore ta on 527?	x-exemp	t organizations				Yes	X	No
		of organiza			(b) Type	e of organi	zation			c) Desc	ription	of rela	itionship		
N/A	(4) 114.710	<u> </u>			(6) .,,,,	5 0. 0. ga				2, 2000		- 10.0			
						····									
				-											
			_							-					
										,					
	Under penalties of	f perjury, I dec	lare that I have	examined this	return, inclui	ding accompai	nying sch	edules an	d statements, and t	o the best	of my ki	nowledge	and belief, i	t is true,	
Sign	correct, and comp	olete Declaration	on of preparer (other than taxp	ayer) is basi	ed on all infori	mation of	which pre	eparer has any kno	wiedge			May the I	DS dicc	ucc
Here	> /2 .		/	0		1 9/2	1.		Toman				this retur	n with th	ie
						Data C	170	<u> </u>	/ reasu	rer			. See ιη <u>st</u> τ	uctions r	¬
	Signature of offi		12000		Proparer's	consture			Date , /				PTIN X	Yes	No
		pe preparer's n			Preparer's	signature	11	4	8/4/200	Che	eck	□"			
Paid		_	OSTELLO		u	y au	vol		0 (7/000	т —	f-employ		P00226	885	
Prepa	ľ		BRANTNE							Firm's E	IN ► (<u>)1-05</u>	35888		
Use O	nly Firm's a		674 MT.			SUITE	1			-		. 	=		
			BANGOR,	ME 044	01					Phone r	10	(207)			
BAA													Form 99	U-PF (2019)

2019 FEDERAL STATEMENTS THE GREENE-MILSTEIN FAMILY FOUNDATION CLIENT THE9341 C/O MONICA TOUESNARD					
7/30/20		7 11 0 11 0 1			01-600934 02 16P
STATEMENT 1 FORM 990-PF, PART I, LINE 11 OTHER INCOME					
			(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
RECOVERIES OF QUAL DISTRI		TOTAL \$	1,000. 1,000.	<u> </u>	3 1,000. 3 1,000.
STATEMENT 2 FORM 990-PF, PART I, LINE 16A LEGAL FEES	\				
LEGAL FEES	TOTAL	(A) EXPENSES PER BOOKS \$ 235. \$ 235.	\$ 235	NET INCOME	(D) CHARITABLE PURPOSES \$ 0.
STATEMENT 3 FORM 990-PF, PART I, LINE 16E ACCOUNTING FEES	3				
ACCOUNTING	TOTAL	(A) EXPENSES PER BOOKS \$ 2,680. \$ 2,680.	(B) NET INVESTMENT INCOME \$ 2,680 \$ 2,680	(C) ADJUSTED NET INCOME . \$ 0.	(D) CHARITABLE PURPOSES \$ 0.
STATEMENT 4 FORM 990-PF, PART I, LINE 160 OTHER PROFESSIONAL FEES	;				
•	1	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES

FIDUCIARY FEES

TOTAL $\frac{\$}{\$}$ $\frac{27,318.}{\$}$ $\frac{\$}{\$}$ $\frac{27,318.}{\$}$ $\frac{\$}{\$}$ $\frac{27,318.}{\$}$ $\frac{\$}{\$}$ $\frac{0.}{\$}$

0.

2	n	1	C
_			_

7/30/20

FEDERAL STATEMENTS

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CLIENT THE9341

EXCISE TAXES

THE GREENE-MILSTEIN FAMILY FOUNDATION **C/O MONICA TOUESNARD**

01-6009341

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CTA:	TEMENT 5	•		
	M 990.PF		LINE	10
PUR	IN AAII-EE	PARII	1 1145	

rokini 990-PF, PART I, LINE 18 TAXES

		(A) ENSES BOOKS	 NET STMENT COME	AD.	(C) JUSTED <u>INCOME</u>	 (D) ARITABLE JRPOSES
TOTAL	\$ \$	1,282. 1,282.	\$ 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 MARKETVALUE
US GOVERNMENT - SEE ATTACHED	COST \$ TOTAL \$	49,085. 49,085.	\$ 50,648. \$ 50,648.

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 EQUITY MUTUAL FUNDS - SEE ATTACHED FOREIGN STOCK - SEE ATTACHED EQUITY MUTUAL FUNDS FOREIGN - SEE ATTCHD OTHER EQUITY - RIGHTS	COST COST COST COST COST	\$ 748,244. 70,275. 88,424. 382,662. 1,523. \$ 1,291,128.	\$ 1,766,188. 73,942. 119,195. 390,854. 1,926. \$ 2,352,105.

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

CORPORATE BONDS	VALUATION <u>METHOD</u>	BOOK <u>VALUE</u>	FAIR MARKET VALUE
CORPORATE BONDS - SEE ATTACHED FOREIGN BONDS - SEE ATTACHED	COST COST	\$ 361,998. 49,288.	\$ 375,264. 50,019.
	TOTAL	\$ 411,286.	\$ 425,283.

2019

FEDERAL STATEMENTS

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THE GREENE-MILSTEIN FAMILY FOUNDATION C/O MONICA TOUESNARD

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

	_	VALUATION BOOK METHOD VALUE			FAIR MARKE		
OTHER PUBLICLY TRADED SECURITIES							
FEDERATED GOVT OBLIG FUND FIXED INCOME MUTUAL FUNDS - SEE ATTACHED		COST COST		\$	157,679. 868,253.	\$	157,679. 911,318.
	-	=	TOTAL	\$	1,025,932.	\$	1,068,997.

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 ACOUIRED	(D) DATE SOLD
1	50000 IBM 1.875%	PURCHASED	VARIOUS	5/15/2019
2	450SH WELLS FARGO	PURCHASED	VARIOUS	6/20/2019
3	128SH DOW INC	PURCHASED	VARIOUS	6/20/2019
4	128SH CORTEVA INC	PURCHASED	VARIOUS	6/20/2019
5	200SH OCCIDENTAL PETE CORP	PURCHASED	VARIOUS	6/20/2019
6	20SH GARRETT MOTION INC	PURCHASED	VARIOUS	6/20/2019
7	33SH RESIDEO TECHNOLOGIES INC	PURCHASED	VARIOUS	6/20/2019
8	50000 TOYOTA MOTOR CORP 3%	PURCHASED	VARIOUS	9/19/2019
9	640SH CELGENE MERGER	PURCHASED	VARIOUS	11/29/2019
10	40000 BLACKROCK INC	PURCHASED	VARIOUS	12/10/2019
11 ,	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	50,000.		50,000.	0.				\$ 0.
2	20,610.		24,615.	-4,005.		i		-4,005.
3	6,383.		4,109.	2,274.				2,274.
4	3,458.		2,165.	1,293.				1,293.
5	9,994.		16,057.	-6,063.				-6,063.
6	300.		77.	223.				223.
7	697.		214.	483.				483.
8	50,000.		49,250.	750.				750.
9	69,625.		18,865.	50,760.				50,760.
10	40,000.		39,710.	290.				290.
11								<u>4,569.</u>
							TOTAL	\$ 50,574.

2019

FEDERAL STATEMENTS

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THE GREENE-MILSTEIN FAMILY FOUNDATION **C/O MONICA TOUESNARD**

01-6009341

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STATEMENT 11 FORM 990-PF, PART VIII, LINE 1 LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED			O ACCOUNT/
ANDREW E. MILSTEIN 629 CUMBERLAND AVE SYRACUSE, NY 13224	TRUSTEE 0	\$	0. \$	0. \$ 0.
MARK MILSTEIN 129 MIDWAY RD ITHACA, NY 14850	INCOMING PRES 0		0.	0.
MONICA TOUESNARD 129 MIDWAY RD ITHACA, NY 14850	INCOMING TREAS 0		0.	0.
NANCY MILSTEIN 6608 LYBROOK COURT BETHESDA, MD 20817	OUTGOING TREAS 0		0.	0.
HERBERT E. MILSTEIN 6608 LYBROOK COURT BETHESDA, MD 20817	OUTGOING PRES 0		0.	0.
	TOTA	L \$	0. \$ 0	<u>\$</u> 0.

STATEMENT 12 FORM 990-PF, PART XV, LINE 2A-D **APPLICATION SUBMISSION INFORMATION**

NAME OF GRANT PROGRAM:

NAME:

CARE OF:

STREET ADDRESS: CITY, STATE, ZIP CODE:

TELEPHONE:

E-MAIL ADDRESS:

FORM AND CONTENT:

SUBMISSION DEADLINES: RESTRICTIONS ON AWARDS: LETTER GIVING DETAILS FOR USE OF FUNDS

THE GREENE-MILSTEIN FAMILY FOUNDATION

NONE NONE

HERBERT MILSTEIN

6608 LYBROOK COURT BETHESDA, MD 20817 301-469-6737