

Form 990-PF
Department of the Treasury
Internal Revenue Service

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

OMB No 1545-0052
2018
Open to Public Inspection

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.

For calendar year 2018 or tax year beginning , and ending

Name of foundation
ROSENBERG FAMILY CHARITABLE FOUNDATION
C/O RICHARD SNIDER
A Employer identification number
04-2947174

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
84 COTTON STREET
B Telephone number
617-965-4590

City or town, state or province, country, and ZIP or foreign postal code
NEWTON, MA 02458
C If exemption application is pending, check here

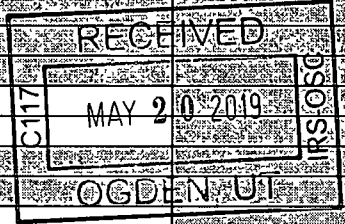
G Check all that apply
 Initial return Initial return of a former public charity
 Final return Amended return
 Address change Name change
D 1. Foreign organizations, check here
2. Foreign organizations meeting the 85% test, check here and attach computation

H Check type of organization Section 501(c)(3) exempt private foundation **al**
 Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation
E If private foundation status was terminated under section 507(b)(1)(A), check here

I Fair market value of all assets at end of year (from Part II, col (c), line 16) **\$ 523,125.**
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 II 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 <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	11,934.	11,934.		STATEMENT 1
4 Dividends and interest from securities	20,905.	20,905.		STATEMENT 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	1,641.			
b Gross sales price for all assets on line 6a				
7 Capital gain net income (from Part IV, line 2)		1,641.		
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	370.	370.		STATEMENT 3
12 Total. Add lines 1 through 11	34,850.	34,850.		
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 STMT 4	2,200.	1,100.		1,100.
c Other professional fees STMT 5	10,254.	10,254.		0.
17 Interest				
18 Taxes				
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses STMT 6	76.	41.		35.
24 Total operating and administrative expenses Add lines 13 through 23	12,530.	11,395.		1,135.
25 Contributions, gifts, grants paid	32,161.			32,161.
26 Total expenses and disbursements Add lines 24 and 25	44,691.	11,395.		33,296.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	<9,841.>			
b Net investment income (if negative, enter -0-)		23,455.		
c Adjusted net income (if negative, enter -0-)			N/A	



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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	12,687.	21,224.	21,224.
	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			
	b Investments - corporate stock STMT 7	255,693.	419,255.	387,117.
	c Investments - corporate bonds STMT 8	320,851.	116,753.	114,784.
	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)	589,231.	557,232.	523,125.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	24 Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. <input type="checkbox"/>			
	25 Unrestricted			
	26 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	880,738.	880,738.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	<291,507.>	<323,506.>	
30 Total net assets or fund balances	589,231.	557,232.		
31 Total liabilities and net assets/fund balances	589,231.	557,232.		

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	589,231.
2 Enter amount from Part I, line 27a	2	<9,841.>
3 Other increases not included in line 2 (itemize) <u>NET TIMING DIFFERENCES</u>	3	762.
4 Add lines 1, 2, and 3	4	580,152.
5 Decreases not included in line 2 (itemize) <u>PRIOR PERIOD ADJUSTMENT</u>	5	22,920.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	557,232.

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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	E*TRADE-DETAILS AVAILABLE UPON REQUEST			12/31/18
b	KKR CO			12/31/18
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))	
a			1,547.	
b			94.	
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			1,547.	
b			94.	
c				
d				
e				
2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,641.
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	29,266.	567,558.	.051565
2016	31,708.	598,529.	.052977
2015	28,306.	645,175.	.043873
2014	32,313.	646,476.	.049983
2013	34,217.	656,558.	.052116

2	Total of line 1, column (d)	2	.250514
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	.050103
4	Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	555,445.
5	Multiply line 4 by line 3	5	27,829.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	235.
7	Add lines 5 and 6	7	28,064.
8	Enter qualifying distributions from Part XII, line 4 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	8	33,296.

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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 <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	235.
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	235.
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	235.
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	293.
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	293.
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> 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	58.
11	Enter the amount of line 10 to be Credited to 2019 estimated tax <input type="checkbox"/> 58. Refunded <input checked="" type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
b		X
c		X
d		
e		
2		X
3		X
4a		X
b	N/A	
5		X
6	X	
7	X	
8a		
b	X	
9		X
10		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 ▶ N/A	X	
14 The books are in care of ▶ RICHARD M SNIDER Telephone no. ▶ 617-965-4590 Located at ▶ 84 COTTON STREET, NEWTON, MA ZIP+4 ▶ 02458		
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? See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶		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) <ul style="list-style-type: none"> (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 ▶ 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? ▶		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)) <ul style="list-style-type: none"> 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 ▶ 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 ▶ 		
3a 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 <ul style="list-style-type: none"> 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 		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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

		Yes	No
5a During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	N/A	5b	
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>		
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		
If "Yes," attach the statement required by Regulations section 53.4945-5(d)	<input type="checkbox"/> Yes <input type="checkbox"/> No		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	X
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			
If "Yes" to 6b, file Form 8870			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b	
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A		
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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
RICHARD M SNIDER 84 COTTON STREET NEWTON, MA 02458	TRUSTEE 3.00	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

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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	
3 All other program-related investments. See instructions.	

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	531,070.
b	Average of monthly cash balances	1b	32,834.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	563,904.
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	563,904.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	8,459.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	555,445.
6	Minimum investment return. Enter 5% of line 5	6	27,772.

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	27,772.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	235.
b	Income tax for 2018. (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	235.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	27,537.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	27,537.
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	27,537.

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	1a	33,296.
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	33,296.
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	235.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	33,061.

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.

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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				27,537.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			25,863.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2018				
a From 2013				
b From 2014				
c From 2015				
d From 2016				
e From 2017				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 33,296.				
a Applied to 2017, but not more than line 2a			25,863.	
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				7,433.
e Remaining amount distributed out of corpus	0.			
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	0.			
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				20,104.
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	0.			
9 Excess distributions carryover to 2019 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				

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

- 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling ▶
- b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year				(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)

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

- a The name, address, and telephone number or email address of the person to whom applications should be addressed
- b The form in which applications should be submitted and information and materials they should include
- c Any submission deadlines
- d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

ROSENBERG FAMILY CHARITABLE FOUNDATION

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Part XV Supplementary Information *(continued)*

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ALZHEIMERS ASSOCIATION - - - 475 S ST. W #13 RAYNHAM, MA 02767	NONE - - -	PUBLIC CHARITY	OPERATING SUPPORT - - -	300.
AMERICAN CANCER SOCIETY 30 SPEEN ST FRAMINGHAM, MA 01701	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
AMERICAN DIABETES ASSOCIATION 1701 NORTH BEAUREGARD STREET ALEXANDRIA, VA 22311	NONE	PUBLIC CHARITY	OPERATING SUPPORT	75.
AMERICAN HEART ASSOCIATION 1 STATE ST. #200 PROVIDENCE, RI 02908	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
AMERICAN JEWISH COMMITTEE JACOB BLAUSTEIN BUILDING 165 EAST 56TH STREET NEW YORK, NY 10022	NONE	PUBLIC CHARITY	OPERATING SUPPORT	75.
Total SEE CONTINUATION SHEET(S) ▶ 3a				32,161.
b Approved for future payment				
NONE				
Total ▶ 3b				0.

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ROSENBERG FAMILY CHARITABLE FOUNDATION
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Part XV. Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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)				
AMERICAN RED CROSS 105 GANO ST PROVIDENCE, RI 02906	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
BEAGLE FREEDOM PROJECT 4804 LAUREL CANYON BLVD #534 VALLEY VILLAGE, CA 91607	NONE	PUBLIC CHARITY	OPERATING SUPPORT	40.
BEST FRIENDS ANIMAL SOCIETY 5001 ANGEL CANYON RD KANAB, UT 84741	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50.
BETHESDA FNDTN/HIKE FOR HOSPICE CINCINNATTI 10500 MONTGOMERY ROAD CINCINNATI, OH 45242	NONE	PUBLIC CHARITY	OPERATING SUPPORT	150.
BOSTON CANCER SUPPORT 831 BEACON STREET #107 NEWTON CENTRE, MA 02459	NONE	PUBLIC CHARITY	OPERATING SUPPORT	1,525.
BOSTON CHILDRENS HOSPITAL 300 LONGWOOD AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	OPERATING SUPPORT	2,779.
BOSTON RESCUE MISSION 39 KINGSTON ST BOSTON, MA 02111	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
BROADWAY CARES 165 WEST 47TH STREET #1300 NEW YORK, NY 10036	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
BROOKLYN LAW SCHOOL 250 JORALEMON ST BROOKLYN, NY 11201	NONE	PUBLIC CHARITY	OPERATING SUPPORT	6,500.
BUDDY DOG HUMANE SOCIETY 151 BOSTON POST RD SUDBURY, MA 01776	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
Total from continuation sheets				31,511.

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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
CARROLL CENTER FOR THE BLIND 770 CENTRE ST NEWTON, MA 02458	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
CHILDRENS CENTER COMMUNICATIONS (BEV. DEAF) 6 ECHO AVENUE BEVERLY, MA 01915	NONE	PUBLIC CHARITY	OPERATING SUPPORT	200.
CHILDRENS MIRACLE NETWORK 205 WEST 700 SOUTH SALT LAKE CITY, UT 84101	NONE	PUBLIC CHARITY	OPERATING SUPPORT	650.
CIRCLE OF CARE 301 STEEPLE CHASE DR PRINCE FREDERICK, MD 20678	NONE	PUBLIC CHARITY	OPERATING SUPPORT	75.
COMBINED JEWISH PHILANTHROPIES 126 HIGH ST BOSTON, MA 02110	NONE	PUBLIC CHARITY	OPERATING SUPPORT	1,936.
DANA FARBER CANCER INSTITUTE 450 BROOKLINE AVE BOSTON, MA 02215	NONE	PUBLIC CHARITY	OPERATING SUPPORT	150.
DEARBORN ACADEMY BENEFIT 34 WINTER STREET ARLINGTON, MA 02474	NONE	PUBLIC CHARITY	OPERATING SUPPORT	3,600.
DOCTORS WITHOUT BORDERS PO BOX 5030 HAGERSTOWN, MD 21741	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50.
EPIPHANY SCHOOL 154 CENTRE ST DORCHESTER, MA 02124	NONE	PUBLIC CHARITY	OPERATING SUPPORT	300.
GUIDE DOGS FOR THE BLIND PO BOX 151200 SAN RAFAEL, CA 94915	NONE	PUBLIC CHARITY	OPERATING SUPPORT	75.
Total from continuation sheets				

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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
HOME FOR LITTLE WANDERERS 10 GUEST STREET BOSTON, MA 02135	NONE	PUBLIC CHARITY	OPERATING SUPPORT	75.
INTERMOUNTAIN RESEARCH & MED FDTN 5121 S COTTONWOOD STREET MURRAY, UT 84157	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
JEWISH FAMILY & CHILDREN SERVICE 1430 MAIN STREET WALTHAM, MA 02451	NONE	PUBLIC CHARITY	OPERATING SUPPORT	150.
JULIE'S FAMILY LEARNING PROGRAM 133 DORCHESTER ST BOSTON, MA 02127	NONE	PUBLIC CHARITY	OPERATING SUPPORT	575.
LESLEY ELLIS SCHOOL 41 FOSTER ST ARLINGTON, MA 02474	NONE	PUBLIC CHARITY	OPERATING SUPPORT	225.
LUKES WINGS 1054 31ST ST NW, STE 540 WASHINGTON, DC 20007	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
MICHAEL J FOX FOUNDATION PARKINSONS PO BOX 780 NEW YORK, NY 10008	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
MSPCA 350 S HUNTINGTON AVE BOSTON, MA 02130	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50.
MUSEUM OF ART & DESIGN 2 COLUMBUS CIR NEW YORK, NY 10019	NONE	PUBLIC CHARITY	OPERATING SUPPORT	1,900.
MUSIC FOR AUTISM 401 PARK AVENUE SOUTH 10TH FLOOR NEW YORK, NY 10016	NONE	PUBLIC CHARITY	OPERATING SUPPORT	200.
Total from continuation sheets				

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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
NEWTON AT HOME 206 WALTHAM STREET WEST NEWTON, MA 02465	NONE	PUBLIC CHARITY	OPERATING SUPPORT	500.
NEWTON FIREFIGHTERS ASSOCIATION PO BOX 600384 NEWTON, MA 02460	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
NEWTON FOOD PANTRY 1608 BEACON STREET NEWTON, MA 02468	NONE	PUBLIC CHARITY	OPERATING SUPPORT	200.
NEWTON NORTH HIGH SCHOOL, BARBARA LOURIE SCHOLARSHIP 457 WALNUT ST NEWTON, MA 02460	NONE	PUBLIC CHARITY	OPERATING SUPPORT	2,000.
NEWTON POLICE MEMORIAL 1321 WASHINGTON ST WEST NEWTON, MA 02465	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
NORTHEAST ANIMAL SHELTER 347 HIGHLAND AVE SALEM, MA 01970	NONE	PUBLIC CHARITY	OPERATING SUPPORT	75.
OPTOMETRIC CENTER OF NY 33 W 42ND ST NEW YORK, NY 10036	NONE	PUBLIC CHARITY	OPERATING SUPPORT	200.
OREGON FOOD BANK PO BOX 55370 PORTLAND, OR 97238	NONE	PUBLIC CHARITY	OPERATING SUPPORT	500.
PAN MASS CHALLENGE 77 4TH AVENUE NEEDHAM, MA 02494	NONE	PUBLIC CHARITY	OPERATING SUPPORT	1,575.
PARALYZED VETS OF AMERICA 1600 BOSTON PROVIDENCE HWY WALPOLE, MA 02081	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
Total from continuation sheets				

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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
PINE STREET INN 444 HARRISON AVENUE BOSTON, MA 02118	NONE	PUBLIC CHARITY	OPERATING SUPPORT	75.
PLANNED PARENTHOOD 1055 COMMONWEALTH AVENUE BOSTON, MA 02215	NONE	PUBLIC CHARITY	OPERATING SUPPORT	75.
PROJECT BREAD 145 BORDER ST EAST BOSTON, MA 02128	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50.
RONALD MCDONALD CENTER 45 GAY STREET PROVIDENCE, RI 02905	NONE	PUBLIC CHARITY	OPERATING SUPPORT	200.
ROSIE'S THEATER KIDS 445 W 45TH ST NEW YORK, NY 10036	NONE	PUBLIC CHARITY	OPERATING SUPPORT	75.
SALVATION ARMY PO BOX 1428 ALEXANDRIA, VA 22313	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
SCHOOLS FOR CHILDREN 8 WINCHESTER PLACE, #202 WINCHESTER, MA 01890	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
SHRINERS HOSPITAL 2900 ROCKY POINT DRIVE TAMPA, FL 33607	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
SNACKS & FRIENDS 316 E 53RD ST NEW YORK, NY 10022	NONE	PUBLIC CHARITY	OPERATING SUPPORT	275.
ST. JUDE CHILDRENS HOSPITAL 262 DANNY THOMAS PL MEMPHIS, TN 38105	NONE	PUBLIC CHARITY	OPERATING SUPPORT	300.
Total from continuation sheets				

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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
THE FISHER HOUSE FOUNDATION 111 ROCKVILLE PIKE, SUITE 420 ROCKVILLE, MD 20850	NONE	PUBLIC CHARITY	OPERATING SUPPORT	200.
TOURO SYNAGOGUE 85 TOURO ST NEWPORT, RI 02840	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
TRUSTEES OF RESERVATIONS 572 ESSEX ST BEVERLY, MA 01915	NONE	PUBLIC CHARITY	OPERATING SUPPORT	70.
WGBH TV ONE GUEST STREET BOSTON, MA 02135	NONE	PUBLIC CHARITY	OPERATING SUPPORT	60.
WOUNDED WARRIOR PROJECT PO BOX 758517 TOPEKA, KS 66675	NONE	PUBLIC CHARITY	OPERATING SUPPORT	250.
ZAKIM CENTER 450 BROOKLINE AVE BOSTON, MA 02115	NONE	PUBLIC CHARITY	OPERATING SUPPORT	300.
ZUMIX 260 SUMMER ST BOSTON, MA 02128	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
BOSTON ASSOCIATION CHILDBIRTH EDUCATION 69 COURT ST NEWTON, MA 02458	NONE	PUBLIC CHARITY	OPERATING SUPPORT	30.
THE BROTHERHOOD SYNAGOGUE 28 GRAMERCY PARK S NEW YORK, NY 10003	NONE	PUBLIC CHARITY	OPERATING SUPPORT	140.
CHAI CENTER 3871 POST RD WARWICK, RI 02886	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
Total from continuation sheets				

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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
COVENANT HOUSE 460 W 41ST STREET NEW YORK, NY 10036	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50.
HOSPICE AND PALLIATIVE CARE FEDERATION OF MASSACHUSETTS 20 COMMERCIAL DRIVE, SUITE ONE WRENTHAM, MA 02093	NONE	PUBLIC CHARITY	OPERATING SUPPORT	150.
HOME FOR OUR TROOPS 6 MAIN STREET TAUNTONMA, MA 02780	NONE	PUBLIC CHARITY	OPERATING SUPPORT	200.
JEWISH NATIONAL FUND 42 E 69TH STREET NEW YORK, NY 10021	NONE	PUBLIC CHARITY	OPERATING SUPPORT	36.
MARTIN RICHARDS FOUNDATION 1452 DORCHESTER AVENUE, 4TH FLOOR DORCHESTER, MA 02122	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100.
MASSACHUSETTS GENERAL HOSPITAL 55 FRUIT ST BOSTON, MA 02114	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50.
SIGNATURE HEALTHCARE 680 CENTRE STREET BROCKTON, MA 02302	NONE	PUBLIC CHARITY	OPERATING SUPPORT	125.
SHARE A SMILE PO BOX 573 BIRMINGHAM, MI 48012	NONE	PUBLIC CHARITY	OPERATING SUPPORT	75.
TECHSOUP 435 BRANNAN ST, STE 100 SAN FRANCISCO, CA 94107	NONE	PUBLIC CHARITY	OPERATING SUPPORT	165.
TEMPLE BETH AVODAH 45 PUDDINGSTONE LN NEWTON CENTRE, MA 02459	NONE	PUBLIC CHARITY	OPERATING SUPPORT	180.
Total from continuation sheets				

823631
04-01-18

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
ETRADE	11,934.	11,934.	
TOTAL TO PART I, LINE 3	11,934.	11,934.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ETRADE	20,571.	0.	20,571.	20,571.	
KKR INC.	334.	0.	334.	334.	
TO PART I, LINE 4	20,905.	0.	20,905.	20,905.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
KKR CO	294.	294.	
KKR CO	6.	6.	
KKR CO	24.	24.	
KKR CO	46.	46.	
TOTAL TO FORM 990-PF, PART I, LINE 11	370.	370.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	2,200.	1,100.		1,100.
TO FORM 990-PF, PG 1, LN 16B	2,200.	1,100.		1,100.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	10,254.	10,254.		0.
TO FORM 990-PF, PG 1, LN 16C	10,254.	10,254.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FILING FEES	35.	0.		35.
BANK & BROKER FEES	41.	41.		0.
TO FORM 990-PF, PG 1, LN 23	76.	41.		35.

FORM 990-PF	CORPORATE STOCK		STATEMENT 7
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
COMMONWEALTH FINANCIAL NETWORK	419,255.	387,117.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	419,255.	387,117.	

FORM 990-PF	CORPORATE BONDS		STATEMENT 8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
COMMONWEALTH FINANCIAL NETWORK	116,753.	114,784.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	116,753.	114,784.	