Form	990-PF	

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

1800

2017

inter	nal Rev	/enue Service	rs.gov/Form990PF for instr	uctions and the latest info		Open to Public Inspection
For	calen	dar year 2017 or tax year beginning JUL	1, 2017	, and ending	JUN 30, 2018	
		foundation			A Employer identification	number
		ROBERTSON SCHOLARS LEAD				
		GRAM		· · · · · · · · · · · · · · · · · · ·	<u>20-24791</u> 03	
		nd street (or P O box number if mail is not delivered to street a	ddress)	Room/suite	B Telephone number	
_1	<u>.01</u>	PARK AVENUE, 48TH FL			212 984-57	00
		own, state or province, country, and ZIP or foreign p YORK, NY 10178-4799	ostal code		C If exemption application is p	ending, check here
	_	all that apply: Initial return	Initial return of a fo	ormer public charity	D 1. Foreign organization:	s, check here
		Final return	Amended return	,		
		Address change	Name change		Foreign organizations me check here and attach co	eting the 85% test, imputation
Н	Check	type of organization: X Section 501(c)(3) ex	empt private foundation	104	E If private foundation sta	tus was terminated
	Se	ction 4947(a)(1) nonexempt charitable trust	Other taxable private founda	tion	under section 507(b)(1	
I F	air ma	arket value of all assets at end of year J Accounti	ng method: X Cash	Accrual	F If the foundation is in a	60-month termination
(1	rom F		ther (specify)		under section 507(b)(1	
_	- \$	17,827. (Part I, colur	nn (d) must be on cash basis	s.)		
P	art I	(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	8,826,965.	· · · · ·	N/A	
	2	Check If the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments			-	
	4	Dividends and interest from securities				
	5a	Gross rents				
	ь	Not rontal income or (loss)			RECEN	
		Not yain or (loss) from sale of assess not on line til	_			18
- 1	В	Gross sales price for all assets on line 0a			8 APR 3 0	
	7	Capital gain net income (from Part IV, line 2)		0.	Ø .	38
à	8	Net short-term capital gain			00054	
	9	Income modifications			OGDEN	UI
	10a	Gross sales less returns and allowances	L			11 2 4
	b	Less Cost of goods sold				<u>'</u>
	C	Gross profit or (loss)			<u> </u>	
	11	Other income	0.000			·
_	12	Total Add lines 1 through 11	8,826,965.			200 000
	13	Compensation of officers, directors, trustees, etc	302,282.	0.		302,282.
	14	Other employee salaries and wages	83,320.	0.	<u> </u>	93 330
,		Pension plans, employee benefits		0.		83,320.
3	16a	Legal fees STMT 1 Accounting fees STMT 2	898. 3,500.	0.		898. 3,500.
Š		•	3,300.			3,300.
ů	1 17	Other professional fees Interest				
	17	Taxes		·	<u> </u>	
	18	Depreciation and depletion			 	
į	20	Occupancy				
į	21	Travel, conferences, and meetings	25,033.	0.	- -	25,033.
		Printing and publications			· · · · · · · · · · · · · · · · · · ·	23,033.
1	23	Other expenses STMT 3	5,030.	0.		5,030.
į	=1	Total operating and administrative				2,000.
3	5	expenses. Add lines 13 through 23	420,063.	0.		420,063.
ç	25	Contributions, gifts, grants paid	8,394,252.			8,394,252.
		Total expenses and disbursements.				
		Add lines 24 and 25	8,814,315.	0.	<u> </u>	8,814,315.
	27	Subtract line 26 from line 12:				
		Excess of revenue over expenses and disbursements	12,650.			
	i	Net investment income (if negative, enter -0-)		0.		
	c	Adjusted net income (if negative, enter -0-)			N/A	

Part III Balance Sheets State-candinate interactions Beginning dylear End of year	For	m 99	THE ROBERTSON SCHOLARS L 0-PF (2017) PROGRAM	EADERSHIP	20	2479103 Page 2
(a) lock value (b) stock value (c) stock value			Balance Sheets Attached schedules and amounts in the description	Beginning of year	End o	f year
2 Sawings and temporary cash investments 3 Accounts receivable Less: allowance for doubtful accounts Less: allowance for d	L	<u>aπ</u>	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
2 Sawings and temporary cash investments 3 Accounts receivable Less: allowance for doubtful accounts A Plotoges receivable A Less: allowance for doubtful accounts A L		1	Cash - non-interest-bearing	5,177.	17,827.	17,827.
Security receivable Less allowance for doubtful accounts Less allowance for doubtful acco		2	Savings and temporary cash investments			
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4 Pledges receivable						
Seriants receivable 6 Receivable 7 Other nest edition receivable 8 Inventions for sale or use 8 Inventions for sale or use 9 Perpad expenses and deferred charges 9 Perpad expenses and deferred charges 9 Investments - Corporate stock 9 Investments - Corporate bonds 1 Investments		4		·····		
5 Grants receivable 6 Receivables due from officers, directors, trustees, and other disqualified persons 7 Own sets and laws receivable Less allowance for doubtful accounts b investments or corporate stock c investments - corporate bronds 11 investments - corporate stock c investments - corporate bronds 11 investments - corporate bronds 12 investments - corporate bronds 13 investments - corporate bronds 14 Land, buildings, and equipment bass 15 Investments - corporate bronds 16 Total assets (fo be completed by all filers - see the instructions, Also, see page 1, Item 1) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 19 Deferred revenue 19 Deferred revenue 19 Deferred revenue 10 Deferred revenue 11 Investments 12 Investments 13 Grants payable 10 Deferred revenue 11 Investments 12 Investments 13 Grants payable 14 Land, buildings, and other notes payable 15 Deferred revenue 16 Deferred revenue 17 Investments 18 Grants payable 19 Deferred revenue 10 Deferred revenue 11 Investments 12 Investments 13 Investments 14 Investments 15 Grants payable 16 Grants payable 17 Investments 18 Grants payable 19 Deferred revenue 10 Deferred revenue 10 Deferr		·	·			
6 Recovables due from officers, directors, trustees, and other disqualited persons 7 Owner state, advance for obubtil accounts ▶ 8 Investments for sale or use 8 Investments for sale or use 9 Prepad expenses and differred charges 10a Investments - Corporate bonds 1 Investments - Mustings, and expense has to trust stoomwhee depretures 1 Investments - mortgage loans 13 Investments - orber 14 Land, buildings, and equipment basis ▶ 15 Total assets (obe completed by all filers - see the instructions. Also, see page 1, item 1) 17 Accounts payable and accrued expenses 18 Grants payable and accrued expenses 19 Deferred revenue 20 Losens from effects, division, and other disqualified persons 21 Losens from that follow SFAS 117, sheek here and complete lines 24 through 26, and lines 30 and 31. 22 Complete lines 24 through 26, and lines 30 and 31. 23 Total liabilities (add lines 17 through 22) 24 Total liabilities (add lines 17 through 27) 25 Total liabilities and net assets/fund balances 27 Capital stock, trust principal, or current funds 28 Rehmed sarrings, accumulated mocine, endowment, or other funds 29 Rehmed sarrings, accumulated mocine, endowment, or other funds 20 Rehmed sarrings, accumulated mocine, endowment, or other funds 29 Rehmed sarrings, accumulated mocine, endowment, or other funds 20 Rehmed sarrings, accumulated mocine, endowment, or other funds 20 Rehmed sarrings, accumulated mocine, endowment, or other funds 21 Rehmed sarrings, accumulated mocine, endowment, or other funds 22 Rehmed sarrings, accumulated mocine, endowment, or other funds 23 Rehmed sarrings, accumulated mocine, endowment, or other funds 24 Rehmed sarrings, accumulated mocine, endowment, or other funds 25 Rehmed sarrings, accumulated mocine, endowment, or other funds 26 Rehmed sarrings, accumulated mocine, endowment, or other funds 27 Rehmed and originate funds of year - Part II, column (a), line 30 3 Total liabilities and net assets/fund bala		5				
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28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 5,177. 17,827. 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3	Ę					
31 Total liabilities and net assets/fund balances 5,177. 17,827. 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 17,827.	S	27				
31 Total liabilities and net assets/fund balances 5,177. 17,827. 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 17,827.	set	28				I
31 Total liabilities and net assets/fund balances 5,177. 17,827. 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 17,827.	As	29	Retained earnings, accumulated income, endowment, or other funds			
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) 2 Enter amount from Part I, line 27a 2 12,650. 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 Add lines 1, 2, and 3	Š	30	Total net assets or fund balances	5,177.	17,827.	
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) 2 Enter amount from Part I, line 27a 2 12,650. 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 Add lines 1, 2, and 3		31	Total liabilities and net assets/fund balances	5,177.	17.827.	
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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 1 5, 177. 2 12, 650. 3 0.	F					
(must agree with end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 1 5, 177. 2 12, 650. 3 0. 4 17,827.	_			0		
2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) Add lines 1, 2, and 3 2 12,650. 3 0. 4 17,827.	•			-		5.177.
3 Other increases not included in line 2 (itemize) ► 3 0. 4 Add lines 1, 2, and 3 4 17,827.	2					
4 Add lines 1, 2, and 3 4 17,827.						
	-					
	-		·			

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Form **990-PF** (2017)

6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

(a) List and describe 2-story brick w	(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.)					low acquired - Purchase - Donation		acquired day, yr.)	(d) Date sold (mo., day, yr.)
<u>1a</u>					┝-				
b NC	DNE				-				
<u> </u>			-		 				
<u>d</u>				-	 				
<u>e</u>	/6\ Da	epreciation allowed	(a) Coc	t or other basis	┷	_	/b\ /	Gain or (loss	
(e) Gross sales price		(or allowable)		xpense of sale				us (f) minus	
<u>a</u>	<u> </u>								
<u>b</u>	+		·•		-				
<u>c</u>	+								
<u>d</u>	+				_				
Complete only for assets show	ing gain in co	olumn (h) and owned by t	he foundation	on 12/31/69.			(I) Gains (Col. (h) gaın	minus
		Adjusted basis		cess of col. (i)			ol. (k), but	not less that	n -0-) or
(i) FMV as of 12/31/69		as of 12/31/69		col. (j), if any	1		Losses	s (from col. (h))
a									
<u>b</u>									
C									
<u>d</u>	 -						-		<u> </u>
<u>e</u>									-
P Capital gain net income or (net o	capital loss)	If gain, also enter If (loss), enter -0-			}	2			
Net short-term capital gain or (lo	oss) as define	•							
If gain, also enter in Part I, line 8	•	, ,	- (-/-		\				
If (loss), enter -0- in Part I, line	8 Indox So	otion 4040/oVtor	Baduaad	Toy on Not	ال	3			
Part V Qualification U				·			ome_		
For optional use by domestic priva	te foundation	is subject to the section 4	940(a) tax on	net investment in	come.	.)			
f section 4940(d)(2) applies, leave	this part blar	ık.							
Was the foundation liable for the se	ction 4942 ta	ix on the distributable am	ount of any ve	ar in the hase ner	iod?				Yes X No
f "Yes," the foundation doesn't qual									
1 Enter the appropriate amount in					ntries.				
(a) Base period years		(b)			(c)			Distrib	(d) oution ratio
Calendar year (or tax year beginn	ning in)	Adjusted qualifying dist		Net value of no	nchar	itable-use asset		(col. (b) div	ided by col. (c))
2016		8,88	0,693.			4,50			971.297003
2015			8,246.			5,48			545.151449
2014			3,438. 4,806.			4,35			724.848026
2013			0,502.			1,67			<u>289.436418</u> 191.671429
2012		0,00	0,0020			_ 42	-	<u></u>	191.0/1429
2 Total of line 1, column (d)							2	28.	722.404325
Average distribution ratio for the	5-vear base	period - divide the total of	n line 2 by 5.0	, or by the numbe	er of v	ears	- <u>*</u> -	1 20,	<u>, 220 10 45 25</u>
the foundation has been in exist	•	•		,,	,		3	5,	744.480865
		•							
Enter the net value of noncharita	able-use asse	ts for 2017 from Part X, I	ne 5				4_		226,588.
Multiply line 4 by line 3							_ 5_	1,30	<u>1,630,430.</u>
								l	_
6 Enter 1% of net investment inco	me (1% of Pa	art I, line 27b)					6_		0.
A Addison Const O								1 20	1 620 420
7 Add lines 5 and 6							7_	1,30	1,630,430.
8 Enter qualifying distributions fro	om Part XII, Iı	ne 4					8_		8,814,315.
If line 8 is equal to or greater tha	an line 7, che	ck the box in Part VI, line	1b, and comp	lete that part usin	g a 19	% tax rate.			
See the Part VI instructions.			<u> </u>						

THE ROBERTSON SCHOLARS LEADERSHIP

	n 990-PF (2017) / PROGRAM		<u> 20-247</u>			Page 4
Pa	art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e)), or 49	48 - see	instruc	tions	3)
1a	Exempt operating foundations described in section 4940(d)(2), check here 🕨 🔲 and enter "N/A" on line 1.) [
	Date of ruling or determination letter: (attach copy of letter if necessary-see instructions)	1 1				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 1%.	}	_1			0.
	of Part I, line 27b					
	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).	ノ				
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	ł	2		—-	0.
-	Add lines 1 and 2	}	3			0.
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	ŀ	4			0.
	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- Credits/Payments:	ł	5			 -
	2017 estimated tax payments and 2016 overpayment credited to 2017	0.				
	Exempt foreign organizations - tax withheld at source	- ; ;				
	Tax paid with application for extension of time to file (Form 8868)	0.				
	Backup withholding erroneously withheld 6d	0.				
	Total credits and payments. Add lines 6a through 6d		7			0.
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	j	8			0.
	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	▶	9			0.
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10			
	Enter the amount of line 10 to be: Credited to 2018 estimated tax	nded 🕨	11			
	art VII-A Statements Regarding Activities		<u> </u>			
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or	intervene i	ın		Yes	No
	any political campaign?			1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for	the definit	tion	1b_		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or					1
	distributed by the foundation in connection with the activities.			<u> </u>		
	Did the foundation file Form 1120-POL for this year?			1c_		Х
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:	•				Í
	(1) On the foundation. ▶ \$ (2) On foundation managers. ▶ \$	<u>0.</u>				
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation	ion				
	managers. • \$			\vdash	——	X
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2_	-	<u> </u>
9	If "Yes," attach a detailed description of the activities. Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporate to the IRS.	oration or				
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	oration, or		3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?			4a	-	X
	of "Yes," has it filed a tax return on Form 990-T for this year?		N/A	4b	$\neg \neg$	_ <u></u> -
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		•	5		X
	If "Yes," attach the statement required by General Instruction T.					
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:				,	
	By language in the governing instrument, or					
	• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with	the state	law			
	remain in the governing instrument?			6	Х	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part	XV		7_	X	 -
8a	Enter the states to which the foundation reports or with which it is registered. See instructions.					
	NC			.	, 1	
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	e)]	
	of each state as required by General Instruction G? If "No," attach explanation			8b	Х	
9	Is the foundation claiming status as a private operating foundation within the meaning of section $4942(j)(3)$ or $4942(j)(5)$) for calen	dar			
	year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV			9		<u>x</u> /
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addressed	es		10	لي	<u> </u>
			F	orm 990	ノ-PF ((2017)

11 At any time during the year, did the foundation, directly, or wind early, own a controlled entity within the meaning of section 51/20/(13)* If "Yes," attach schedule. See instructions 12 Did the foundation make a districture to a districture to a districture of a districture	P	art VII-A Statements Regarding Activities (continued)	7103		age
11 All any time during the year, dut the foundation, directly or indirectly, own a controlled entity within the meaning of section \$15(0)(15)(17) 17 Yes, attach stateducts, steedule, See instructions 12 Did the foundation morely and interface discretion in a diorized advised fund over which the foundation or a disqualified person had advisory privileges? 13 I X 13 I X 15 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 16 Website address ▶ WWW.ROSERSONSCHOLARS.ORG 17 The books are in care of ▶ THE FOUNDATION Telephone no. ▶ 21.2 984-5700 18 Located at ▶ 10.1 PARK AVENUE, 487H FL, NEW YORK, NY Telephone no. ▶ 21.2 984-5700 18 Section 487(9)(1) romezempt charable trusts fining from 900-PF in level of Form 1041-check three and enter the amount of tax-exempt interest received or account during the year 19 A ray time during cleanerly zero 2017, dull the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 19 A ray time during cleanerly zero 2017, dull the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 19 Earl VII-8 Statements Regarding Activities for Which Form 4720 May Be Required 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 10 During the year, did the foundation (either directly or indirectly): 11 During the year, did the foundation (either directly or indirectly): 12 During the year, did the foundation (either directly or indirectly): 13 Engage in the sale or exchange, or facilities to (or accept them from) a disqualified person? 14 Per or membersion to, or pay or remburse the expenses of, a disqualified person? 15 Person the selection of the	<u></u>	Continued)	Τ	Vec	No
section 57(0)(13)? If Yes, attach schedule. See instructions 10 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 10 did the foundation comply with the public importance of the foundation or a disqualified person and person had advisory privileges? If Yes, attach statement. See instructions 10 did the foundation comply with the public importance or a disqualified person and person had advisory privileges? If Yes, attach statement. See instructions 10 did the foundation comply with the public importance or did the foundation of the foundation foundation in the foundation had been advised for the foundation had advised for the foundation had advised for section 497(2)(1) noneampt charitable trusts fring from 990-Fin lieu of Form 1041-check three and either the animum of the xeemption interest received or accrused during the year 10 August plane deriver, and advised and the foundation had advised from 990-Fin lieu of Form 1041-check three and either foundation account in a foreign country. 11 August plane deriver, and advised from 990-Fin lieu of Form 1041-check three and either foundation interest created or accrused during the year 12 August plane deriver, and the foundation have an interest in or a signalistic or or separative or other authority over a bank, securities, or other financial account in a foreign country. 12 August plane for inscription and fining requirements for FinCRN Form 114. If Yes, enter the name of the foundation of the foundation had seen any entered to a separative or other authority over a bank, security from 114. If Yes, enter the name of the foundation of the certain foundation of the foundation of the foundation of experiment of the foundation of or exception and foundation person. 13 During the year, did the foundation of the foreign of more received. 14 During the year, did the foundation of certain foundation or assets to a desqualidated p	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of	-	163	140
12	''		,,	İ	v
If "Yes," attach statement. See instructions 12 X 3 3 bit the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 X 3 3 3 3 3 3 3 3	12		 '''		<u> </u>
18 Dut the foundation comply with the public respection requirements for its annual returns and exemption application? 14 The books are in care of ▶ THE FOUNDATION Loaded at ▶ 101 PARK AVENUE, 45 TH L, NEW YORK, NY Loaded at ▶ 101 PARK AVENUE, 45 TH L, NEW YORK, NY Loaded at ▶ 101 PARK AVENUE, 45 TH L, NEW YORK, NY Loaded at ▶ 101 PARK AVENUE, 25 TH L, NEW YORK, NY Loaded at ▶ 101 PARK AVENUE, 45 TH, L, NEW YORK, NY Loaded at № 101 PARK AVENUE, 45 TH, L, NEW YORK, NY Loaded at № 101 PARK AVENUE, 2017, dit he loaded from 19041 - theck here and enter the amount of tax-exempt interest received or accrued during the year A that yie medium celeirary are; 2017, did the loaded non-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 filling requirements for FinCEN Form 114, If Yes, "enter the name of the foreign country. ▶ Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 Degree of the foundation (either directly or indirectly); 10 Engage in the sace or exchange, or leading for percept with a disqualified person? 10 Degree of the foundation (either directly or indirectly); 11 Engage in the sace or exchange, or isolations to (or accept them from) a disqualified person? 12 Person promosy from, land money to, or otherwise exdend credit to (or accept it from) a disqualified person? 13 Furmash poods, services, or facilities to (or accept them from) a disqualified person? 14 Person promosy from, land money to, or otherwise extended for the benefit or use of a disqualified person? 15 Part Verson yie money or promosy or promptive the expenses of, a disqualified person? 16 Part verson yie money or promptive to discovering the person of the exceptions described in Regulations section 53.4941(0)-3 or an aurient notice regarding dissest assistance? See instructions 16 Part verson prompti	12		12		x
White address \to \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	13	·		x	
14 The books are in case of ▶ THE FOUNDATION Telephone no. ▶21.2 98.4-5700 Located at ▶ 10.1 PARK AVENUE, 48TH FL, NEW YORK, NY Telephone no. ▶21.2 98.4-5700 Section 497(a)(1) nonexempt charable trusts thing Form 980-FF in lieu of Form 1041-check here and enter the amount of tax-exempt interest received or accrued during the year N/A 16 A ray frime during cleanify are 2017, 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 filting requirements for FinCEN Form 114. If "Yes," enter the name of the form 147. If "Yes IN to securities, or other financial account in a foreign country? Flarenge country Parter VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" country, unless an exception applies. 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? 2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 3) Firmish poods, services, or facilities to (or accept them from) a disqualified person? 4) Pay compensation tio, or pay or reimburse the expenses of 4 disqualified person? 4) Pay compensation tio, or pay or reimburse the expenses of 9 delite available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person)? 5) Agree to be ymoney or properly to a government official? (Exception, Check 'No' if the foundation engage in a prior year in any of the acts fall to qualify under the exceptions described in Regulations section 53.494 (10,-3 or in a current notice regarding disaster assistance? See instructions 6) Agree to be ymoney or propriety to a government official? (Exception, Check 'No' if the foundation engage in a prior year in any of the acts fall to qu			[10		<u> </u>
Located at ▶ 101 PARK AVENUE, 48TH FL, NEW YORK, NY Section 447(a)(1) moneampt charatable trusts filing form 990-PF in less of Form 1041 - check here and enter the amount of tax-exempt interest received or accreed duming the year 16. At any time durring calendary year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial security. See the instructions for exceptions and filing requirements for FinCRI Form 114. If "Yes," enter the name of the foreign county. See the instructions for exceptions and filing requirements for FinCRI Form 114. If "Yes," enter the name of the foreign county. See the instructions for exceptions and filing requirements for FinCRI Form 114. If "Yes," enter the name of the foreign county. See the instructions for exceptions and filing requirements for FinCRI Form 114. If "Yes," enter the name of the foreign county. See the instructions for exceptions and filing requirements for FinCRI Form 114. If "Yes," enter the name of the foreign county. See the instructions of exception and filing requirements for FinCRI Form 114. If "Yes," enter the name of the foreign county. If the foreign county is adequalited person? 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.	14		34-5	700	
15 Section 4947(a)(1) nonexempt charatable 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 16 At any time during calendar year 2017, 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 formation country. 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. 1a During the year, did the foundation (either directly or indirectly): 1b Enagea in the sale or exchange, or iteasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish poods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or remibruse the expenses of, a disqualified person? (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)? (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.) 1 If any answers is "Se' to 14(1)-6), did any of the acts lat to qualify under the exceptions discribed in Regulations section 34.941(d)-3 or in a current notice regarding disaster assistance, Neck here 0 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 2017? 1a At the end of tax year 2017, did the foundation have any undistributed income (times 6d and 6e, Part XIII) for tax year(s) beginning before 2	• •				99
and enter the amount of the exempt interest received or accrued during the year 6 All any time during calendar year 2017, 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! Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any titem is checked in the "Yes" column, unless an exception applies. 1a During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or ritherwise extend credit to (or accept it from) a disqualified person? (3) Furnish poods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a desqualified person (or make any of either available for the benefit or use of a desqualified person (or make any of either available for the benefit or use of a desqualified person (or make any of either available for the benefit or use of a desqualified person (or make any of either available for the benefit or use of a desqualified person (or make any of either available for the person of property to a government official? (Exception. Check No' if the foundation angage in a price year in any of the acid set in the qualify under the exceptions described in Regulations section 53.4941(a)-3 or in a current notice regarding disaster assistance, check here 1b If yes, is the even of year is a price year any of the acid sets feel in la, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017? 1c Taxes on failure to distribute income (section	15				<u>.</u>
16 At any time during calendar year 2017, 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 fitting requirements for FinCEN Form 114. If "Yes," either the name of the foreign country. Part VIII-8 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. 1a During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or lessing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Iransfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person) or was any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person) or was any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person) or was any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person) or was any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person) or was any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the distribution or internation of government of the available for the available for the available for the available fo			N	/A	
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c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			2b		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 2017 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 2017.) 13b 14a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 25 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 2017?	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? b If "Yes," did it have excess business holdings in 2017 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 2017.) 13b 14a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 25 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 2017?		>			
b If "Yes," did it have excess business holdings in 2017 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 2017.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2017? 4b X	3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
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 2017.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2017? 4b X		during the year?			
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 2017.) 10	b	, , , , , , , , , , , , , , , , , , ,		1	
Form 4720, to determine if the foundation had excess business holdings in 2017.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017? 4b X					
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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 2017? 4b X			3b		
had not been removed from jeopardy before the first day of the tax year beginning in 2017?			4a]	Х
	þ]

Part VII-B	Statements Regarding Activities for Which F	orm 4720 May Be R	equired (contin	ued)			
5a During the	year, did the foundation pay or incur any amount to:			•	•	Yes	No
(1) Carry	on propaganda, or otherwise attempt to influence legislation (section	n 4945(e))?	Y	es X No			
(2) Influer	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly,						
any vo	ter registration drive?		Y	es X No			
(3) Provid	e a grant to an individual for travel, study, or other similar purposes	?	Y	es X No			
(4) Provid	e a grant to an organization other than a charitable, etc., organizatio	n described in section					ı
4945(d)(4)(A)? See instructions		Y	es X No			ı
(5) Provid	e for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f	or				
	evention of cruelty to children or animals?			es X No			
b If any answ	er is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	der the exceptions described i	in Regulations				
section 53.	4945 or in a current notice regarding disaster assistance? See instri	uctions	•	N/A	5b		
Organizatio	ns relying on a current notice regarding disaster assistance, check l	nere		▶□			
c If the answ	er is "Yes" to question 5a(4), does the foundation claim exemption f	rom the tax because it maintai	ined				
expenditure	responsibility for the grant?	N	1/A 🔲 Y	es 🔲 No			
If "Yes," atta	ach the statement required by Regulations section 53.4945-5(d).						
6a Did the fou	ndation, during the year, receive any funds, directly or indirectly, to	pay premiums on			~~		
	benefit contract?	. • .		es X No			
b Did the fou	ndation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?			6b		$\overline{\mathbf{x}}$
	b, file Form 8870.						
7a At any time	during the tax year, was the foundation a party to a prohibited tax s	helter transaction?	☐ Ye	es X No			l
-	the foundation receive any proceeds or have any net income attribu			N/A	7b		
Part VIII	Information About Officers, Directors, Truste		nagers, Highly				
	Paid Employees, and Contractors						
1 List all office	ers, directors, trustees, and foundation managers and t	neir 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	a	(e) Expo count, allowar	other
		to position	Cinco o j	compansation	†	anoma	
SEE STA	TEMENT 4	1	302,282.	70,990			0.
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	-				1		
-					 		
	**						
2 Compensat	tion of five highest-paid employees (other than those inc	luded on line 1). If none, o	enter "NONE."		4		
		(b) Title, and average		(d) Contributions to employee benefit plans and deferred	1 (е) Ехра	enșe
(a) Nan	ne and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deferred compensation	' ad	count, allowan	other
NC	ONE	to position	· · · · · · · · · · · · · · · · · · ·	compensation	+	anowan	
-				<u> </u>	+		
					1		
					+-		
		<u></u> .		<u>. </u>	+		
_		<u> </u>			+		
Total number of	other employees paid over \$50,000	<u>. </u>					0
was munipus Ul	στιοι στιριστούο μαια στοι ψου,υου		 -		000	DE :	

2	0	_	2	4	7	9	1	0	3	

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 SEE ATTACHMENT A.		 -
<u> </u>		
		414,834.
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		Amount
	_	
	_	
2		
	\neg	
All other program-related investments. See instructions.		
3		
	\Box	
	_	
		
Total. Add lines 1 through 3	<u> </u>	0.
	For	m 990-PF (2017

P	art:X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations, s	ee 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	0.
b	Average of monthly cash balances	1b	230,039.
C	Fair market value of all other assets	1c	
đ	Total (add lines 1a, b, and c)	1d	230,039.
е	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	230,039.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,451.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	226,588.
6	Minimum investment return Enter 5% of line 5	6	11,329.
P	art-XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations, check here and do not complete this part.)	id certain	
1	Minimum investment return from Part X, line 6	1	11,329.
2a	Tax on investment income for 2017 from Part VI, line 5		
b	Income tax for 2017. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	11,329.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	11,329.
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	11,329.
	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	40	8,814,315.
a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	0,014,313.
Þ	Program-related investments - total from Part IX-B Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	1b 2	
2	Amounts set aside for specific charitable projects that satisfy the:		
3	Suitability test (prior IRS approval required)	3a	
a	Cash distribution test (attach the required schedule)	3b	
b 4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	8,814,315.
4 5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	 	0,011,010.
Ü	income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	8,814,315.
U	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of	<u> </u>	
	4940(e) reduction of tax in those years.	_	

Form **990-PF** (2017)

Part XIII Undistributed Income (see instructions)

1 Distributible amount for 2017 from Part XI, Intel® 2 1 Distributible amount for 2016 only 2 Excess distributions carryover, if any, to 2017; a From 2019 5 From 2013 6 From 2015 6 From 2015 6 From 2016 7 Total of lines 3 lithough e 4 Qualifying distributions out of 2017 from Part XII, Intel® 6 Ps. 8 8 814 4, 315. a Applied to 2016, but not more than line 2a Applied to 2016, but not more than line 2a Applied to 2016, but not more than line 2a Applied to 2016, but not more than line 2a Applied to 2016, but not more than line 2a Applied to 2016, but not more than line 2a Applied to 2016 only 8 8, 814 , 090. 3 Excess distributions out of corpus ((Section required - see instructions) 5 Cream short and a continued of the continue		(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
2 Lindardibusions recover, draw, as of the end of 2917 a. Enter amount for 2016 only b. Total for from years: 3 Excess distributions carryover, if any, to 2017: a From 2013 b. From 2013 c. From 2016 b. From 2015 c. From 2016 b. From 2016 c. From 2016	1 Distributable amount for 2017 from Part XI,				
a Enter amount for 2016 only b Total for prior years: 5 Excess distributions carryover, if any, to 2017: a From 2019 b From 2015 e From 2015 e From 2015 f From 2016 f From 2	line 7				11,329.
\$ Total for prior years: 3 Excess distributions carryover, if any, to 2017; a From 2013 6 From 2014 6 From 2015 6 From 2015 6 From 2016 1 Total of fines 3a through e 4 Qualifying distributions for 2017 from Part XII, line 4 1 3 8 8, 814 , 315 . a Applied to 2016, but not more than line 2a b Applied to undistributed income of prior Part XII, line 4 1 3 8 8, 814 , 315 . a Applied to 3016, but not more than line 2a b Applied to 3016 from 1016 control of corpus 6 Existent nequenced - see instructions) 6 Treated as distributions out of corpus 6 Exement distributions out of corpus 6 Exement distributions out of corpus 7 Applied to 2017 distributible amount must be aforem outliere (iii) 10 a more and separate accessing (ii) fine series amount must be aforem outliere (iii) 10 a from fines a special control of the series amount must be aforem outliere (iii) 10 a from fines a special control of the series amount must be aforem outliere (iii) 10 a from fines a special control of the series amount must be aforem outliere (iii) 10 a from fines a special control of the series amount must be aforem outliere (iii) 10 a from fines a special control of the series amount must be aforem outliere (iii) 10 a from fines a special control of the series amount must be aforem and crome for 2016 substract line 10 a from fine 2 a from fine 2 a from fine 2 a from fines a from 2018 11, 329 . Amounts treated as distributions out of corpus to salishy requirements immosed to corpus to salishy requirements mismosed to corpus to s	2 Undistributed income, if any, as of the end of 2017				
3 Excess distributions carryover, if any, to 2017: a From 2012 b From 2015 e From 2015 e From 2016 d From 2016 d From 2016 e From 2016 d From 2016 1 Total of lines 3 a through e 1 Oualifying distributions for 2017 from Part XII, line 4 ▶ \$ 8, 814, 315. a Applied to 2015, but not more than line 2a b Applied to 2015 but not more than line 2a b Applied to 2015 but not more than line 2a b Applied to 2015 distributions out of corpus (Election required - see instructions) d Applied to 2017 distributable amount e Remaining amount distributions out of corpus (Election required - see instructions) 5 Excess distributions carryover spends to 2477 must see when in column (2) 6 Electric the net total of each column as indicated below: 3 Corpus Add lines 31.4s, and as Subreact lines 5 Prior years' unforced for years a notice of undistributed income for years and the substitution of the distribution of t	-		· · · · · · · · · · · · · · · · · · ·	225.	
3 Excess distributions carryover, if any, to 2017: a From 2018 b From 2015 e From 2015 e From 2016 1 Total of lines 3a through e 4 Qualifying distributions for 2017 from Part XII, line 4: > 3, 8, 144, 315. Applied to 2016, but not more than line 2a Applied to undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) c Treated as distributions arrows expense applies amount e Remaining amount distributed out of corpus c Excess destributions arrows expense applies about 70 or an antionit appears in collerin (6), the same amount may be seen as a feature of the complete	b Total for prior years:		0		
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From 2013 From 2015 From 2016 Total of lines 3a through e	· · · · · · · · · · · · · · · · · · ·				
s From 2014 d From 2015 e From 2015 e From 2016 0 Total of lines 3a through e 1 Total of lines 3a through e 1 Couldying distributions for 2017 from Part XII, line 4 ► S 8, 814 4, 315. a Appiled to 2016, but not more than line 2a b Appiled to windstributed emore of prior years (Election required - see instructions) (Election r					
d From 2016 From 2016 From 2016 Total of lines 3a through e 0.4 Oualying distributions for 2017 from Part XII, Inex 4 ** S ** 8,814,315. 4 Applied to 2016, but not more than line 2a D Applied to undistributed more of prory years (Election required - see instructions) Treated as distributions out of corpus (Election required - see instructions) ** A Applied to 2017 distributibate amount e Remaining amount distributed out ot corpus ** Excees distributions carryoete see 100 0. ** B , 814,090. 0. 0. 0. 0. 0. 0. 0. 0. 0.					
e From 2016 Total of lines 3a through e O.					
1 Total of lines 3a through e 4 Qualifying distributions for 2017 from Part XII, Ine 4 N S 8, 814, 315. A Applied to 2016, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) C Trated as distributions out of corpus (Election required - see instructions) * 4 Applied to 2017 distributable amount R emaining amount distributed out of corpus Excess destributions carryower spriete to 2017 Institute between reclaime (1) Between the net total of each column as indicated below: 1 Corpus Add fines 31.46, and 4s Subsect line 9 By Prior years (undistributed numone, Subtract line 4b from line 2b C Enter the amount of prior years' undistributed income for 2016. Subtract line 4b from line 2b C Enter the amount of prior years' undistributed income for which a notice of deticinency has been assued, or on which the section 4942(a) tax has been previously assessed 3 Subtract line 6c from line 6b. Taxable amount - see instructions 4 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b) (1)(f) or 4942(g)(3) (Elebton may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 Amounts treated as distributions (1) B Excess distributions carryover to 2018. Subtract line 6: A Excess from 2015					
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indicated below: a Corpus Add Iness 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed incomes. Subtract line 4b from line 2b 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 d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170b(11)(f) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015					
b Prior years' undistributed income. Subtract line 4b from line 2b 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 d Subtract line 6b. Taxable amount - see instructions e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018 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) 8 . Excess distributions carryover from 2012 not applied on line 5 or line 7 9 . Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 0. 10 Analysis of line 9: a Excess from 2013 b Excess from 2015	= -				
line 4b from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 494(2) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instructions f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018 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) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 0. 10 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015	a Corpus Add lines 3f, 4c, and 4e Subtract line 5	8,814,090.			
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amount - see instructions e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018 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) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015					,,, <u>,</u>
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Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015	·				-
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a Excess from 2013 b Excess from 2014 c Excess from 2015					
b Excess from 2014 c Excess from 2015	· 1				
c Excess from 2015	<u> </u>				
	<u> </u>				
	d Excess from 2016				
e Excess from 2017	e Excess from 2017				

THE ROBERTSON SCHOLARS LEADERSHIP Form 990-PF (2017) **PROGRAM** 20-2479103 Page 10 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 2017, 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(1)(5 Prior 3 years 2 a Enter the lesser of the adjusted net Tax year (a) 2017 (d) 2014 (b) 2016 (c) 2015(e) Total income from Part I or the minimum investment return from Part X for each year listed **b** 85% of line 2a 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 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 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 Gross investment income Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.) 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 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:

Form 990-PF (2017)

Form 990-PF (2017) **PROGRAM**

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Part XV Supplementary Information	(continued)			
3 Grants and Contributions Paid During the	fear or Approved for Future	Payment		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	, anount
a Paid during the year				
DUKE UNIVERSITY	N/A	₽C	SUPPORT FOR THE	
207 ALLEN BLDG, BOX 90001	[····	[]	ROBERTSON SCHOLARS	
DURHAM, NC 27708-0001			LEADERSHIP PROGRAM AT	
			THE UNIVERSITY.	6,308,251.
UNIVERSITY OF NORTH CAROLINA AT	N/A	PC	SUPPORT FOR THE	
CHAPEL HILL			ROBERTSON SCHOLARS	
103 SOUTH BLDG, CAMPUS BOX 9100	İ		LEADERSHIP PROGRAM AT	
CHAPEL HILL, NC 27599-9100			THE UNIVERSITY.	2,086,001.
		<u> </u>		
Total		 	> 3a	8,394,252.
b Approved for future payment				
NONE				
-				
			1	- · · · ·
Total		-144444444444		0.

Part XVI-A Analysis of Income-Producing Activities

Program service revenue: A	Enter gross amounts unless otherwise indicated.	Unrelated	business income		by section 512, 513, or 514	(e)
a b c c d d d d d d d d d d d d d d d d d	1 Program carvice revenue:	(a) Business		(C) Exclu- sion		Related or exempt
b c d d d d d d d d d d d d d d d d d d		code		Code		
c d d e f		-				
d e f g Fees and contracts from government agencies 2 2 Membership dues and assessments 3 3 Interest on savings and temporary cash investments 4 4 Dividends and interest from securities			<u> </u>		***************************************	
g Fees and contracts from government agencies 2 Membership dues and assessments 3 Interest on savings and temporary cash investments 4 Drividends and interest from securities 5 Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c c d d e e Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) 5 See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of		-	· · · · · · · · · · · · · · · · · · ·	1		
g Fees and contracts from government agencies 2 Membership dues and assessments 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate: a Debt-inanced property b Not debt-inanced property c Not debt-inanced property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from sales of inventory 1 Other revenue: a b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) 5 See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of			·			
2 Membership dues and assessments 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate; a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c d d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	f					
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5 Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c d e e e e e e e e e e e e e e e e e e	investments					
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a b c d d d d d d d d d d d d d d d d d d				+		·
b						
c d		-		╅		<u> </u>
d		-	·	+-+	· · · · · ·	
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Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).	Part XVI-B Relationship of Activities	to the Accom	plishment of Ex	empt P	urposes	
the foundation's exempt purposes (other than by providing funds for such purposes).	Line No. Explain below how each activity for which inc	ome is reported in o	column (e) of Part XVI-	A contribute	d importantly to the accom	nlishment of
	▼ the foundation's exempt purposes (other than	by providing funds	for such purposes).		- mpartamy to the accom	phoning of
						.
						<u> </u>
			·			
						

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)

Yes No

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

(other tha	an section 501(c)(3) organ	iizations) or in sectio	n 527, relatını	g to political organizations?				
a Transfers	s from the reporting founda	ation to a noncharitat	ole exempt or	ganization of:				
(1) Cash	1						1a(1)	X
(2) Othe	r assets						1a(2)	X
b Other trai	· · · · · · · · · · · · · · · · · · ·							
	s of assets to a noncharital						1b(1)	X
(2) Purc	hases of assets from a noi	ncharitable exempt o	rganization				1b(2)	X
(3) Rent	al of facilities, equipment,	or other assets					1b(3)	X
	nbursement arrangements						1b(4)	X
	ns or Ioan guarantees						1b(5)	X
	ormance of services or me	•	=				1b(6)	X
•	of facilities, equipment, ma	•					10	X
	•		•	` '	•	r market value of the goods, o	•	
					ie in any transactio	on or sharing arrangement, st	10W IN	
, ,	d) the value of the goods,				· r ·	· · · · · · · · · · · · · · · · · · ·		
(a) Line no	(b) Amount involved	(c) Name of		e exempt organization	(d) Descripti	ion of transfers, transactions, and s	haring arrangeme	nts
			N/A		 			
								
								
					4			
					<u> </u>			
					_			
				<u> </u>				
						,		
2a Is the fou	indation directly or indirect	ly affiliated with, or r	elated to, one	or more tax-exempt organ	zations described	_		_
ın section	n 501(c) (other than section	n 501(c)(3)) or in sec	ction 527?			L	YesX	No
b If "Yes," c	omplete the following sch			ī	,			
	(a) Name of org	anization		(b) Type of organization		(c) Description of relations	nip	
	N/A							
			 					
				accompanying schedules and st taxpayer) is based on all informa		May	the IRS discuss t	this
Sign L		biere pecial amplicit biet	Jana (Othar Bian			sho	rn with the prepar wn below? See in:	
Here	Dr. Hu	on A	2	14/23/19	TRUST	EE	X Yes] No
Sig	nature of officer or trustee			Date	Title			
	Print/Type preparer's na	me	Preparer's s	ıgnature	Date	Check If PTIN		
			\ .	4 (1)	4123/19	self- employed		
Paid	JOSEPH L.		Mondy	1 cw	7112		2093808	
Preparer	Firm's name ► PKF	O'CONNOR	DAVIE	S, LLP		Firm's EIN ► 27-1	728945	
Use Only								
	Firm's address ▶ 66	5 FIFTH A	VENUE					
		W YORK, N		2		Phone no. 212-28	36-2600	
	-	•					rm 990-PF	(2017)
								• •

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.

To Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2017

Name of the organization

THE ROBERTSON SCHOLARS LEADERSHIP PROGRAM

Employer identification number

20-2479103

Organization type (check one)					
Filers o	f:	Section:			
Form 99	90 or 990-EZ	501(c)() (enter number) organization			
		4947(a)(1) nonexempt charitable trust not treated as a private foundation			
		527 political organization			
Form 99	90-PF	X 501(c)(3) exempt private foundation			
		4947(a)(1) nonexempt charitable trust treated as a private foundation			
		501(c)(3) taxable private foundation			
		s covered by the General Rule or a Special Rule . 7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions			
Genera	l Rule				
X		n filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or one contributor. Complete Parts I and II See instructions for determining a contributor's total contributions.			
Special	Rules				
	sections 509(a)(1) a any one contributo	described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under 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 r, 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, line 1. Complete Parts I and II			
	year, total contribu	described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the tions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for ruelty to children or animals. Complete Parts I, II, and III			
	year, contributions is checked, enter h purpose Don't con	described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box ere the total contributions that were received during the year for an exclusively religious, charitable, etc., inplete any of the parts unless the General Rule applies to this organization because it received nonexclusively etc., contributions totaling \$5,000 or more during the year			
		at isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990 EZ, or 990 PF), 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			

LHA 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) (2017)

certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization
THE ROBERTSON SCHOLARS LEADERSHIP
PROGRAM

Employer identification number

20-2479103

Part i	Contributors (see instructions). Use duplicate copies of Part I if additional	I space is needed.	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ROBERTSON FOUNDATION 101 PARK AVE, 48TH FL NEW YORK, NY 10178-4799	\$ <u>8,798,861.</u>	Person X Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	MARK J. LAABS 1012 MONMOUTH AVE DURHAM, NC 27701-1712	\$\$ <u>12,500.</u>	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)

Name of organization
THE ROBERTSON SCHOLARS LEADERSHIP
PROGRAM

Employer identification number

20-2479103

Partill	Noncash Property (see instructions) Use duplicate copies of Part II if a	additional space is needed	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	

	BERTSON SCHOLARS LEADER	RSHIP	Employer identification number
PROGRAI Part III		columns (a) through (e) and the follogonian characters, characters, etc., contributions of \$1,000 or	in section 501(c)(7), (8), or (10) that total more than \$1,000 for wing line entry. For organizations less for the year (Enter this info once)
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-	Transferee's name, address, ar	(e) Transfer of gif	t Relationship of transferor to transferee
-			
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
- - - -	Transferee's name, address, ar	(e) Transfer of gift	Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-	Transferee's name, address, ar	(e) Transfer of gift	Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-	Transferee's name, address, an	(e) Transfer of gift	Relationship of transferor to transferee

			 	
FORM 990-PF	LEGAL	FEES	S	TATEMENT 1
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES
GENERAL LEGAL COUNSEL	898.	0.		898.
TO FM 990-PF, PG 1, LN 16A =	898.	0.		898.
FORM 990-PF	ACCOUNTI	NG FEES	S	TATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX RETURN PREPARATION	3,500.	0.		3,500.
TO FORM 990-PF, PG 1, LN 16B	3,500.	0.		3,500.
FORM 990-PF	OTHER E	XPENSES	S	TATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE AND GENERAL EXPENSES CONTRIBUTION PROCESSING FEES TELEPHONE EXPENSE PAYROLL PROCESSING FEES	57. 830. 580. 3,563.	0. 0. 0.		57. 830. 580. 3,563.
TO FORM 990-PF, PG 1, LN 23	5,030.	0.		5,030.

	F OF OFFICERS, DEFOUNDATION MANAGE	STATEMENT 4		
NAME AND ADDRESS	TITLE AND AVRG HRS/WK		EMPLOYEE BEN PLAN CONTRIB	EXPENSE
JULIAN H ROBERTSON JR	TRUSTEE/DIRECTO	OR		
C/O ROBERTSON SCHOLARS PROGRAM 101 PARK AVE, 48TH FL NEW YORK, NY 10178-4799	1.00	0.	0.	0.
RICHARD BRODHEAD C/O ROBERTSON SCHOLARS PROGRAM	TRUSTEE/DIRECTO	OR (THRU JUI	NE 2017)	
101 PARK AVE, 48TH FL NEW YORK, NY 10178-4799	1.00	0.	0.	0.
CAROL L. FOLT C/O ROBERTSON SCHOLARS PROGRAM	TRUSTEE/DIRECTO	OR		
101 PARK AVE, 48TH FL NEW YORK, NY 10178-4799	1.00	0.	0.	0.
VINCENT PRICE C/O ROBERTSON SCHOLARS PROGRAM	TRUSTEE/DIRECTO	OR (BEGAN J	JLY 2017)	
101 PARK AVE, 48TH FL NEW YORK, NY 10178-4799	1.00	0.	0.	0.
DR. ARRON STERN C/O ROBERTSON SCHOLARS PROGRAM	TRUSTEE/DIRECTO	OR		
101 PARK AVE, 48TH FL NEW YORK, NY 10178-4799	1.00	0.	0.	0.
ALLEN CHAN C/O ROBERTSON SCHOLARS PROGRAM	EXECUTIVE DIREC	CTOR		
RM 023, CB#1301 UNC-CHAPEL HILL CHAPEL HILL, NC 27599-1301	40.00	302,282.	70,990.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6,	PART VIII	302,282.	70,990.	0.

FORM 990-PF

ELECTION UNDER REGULATIONS SECTION 53.4942(A)-3(D)(2) TO TREAT EXCESS QUALIFYING DISTRIBUTIONS AS DISTRIBUTIONS OUT OF CORPUS

STATEMENT 5

IN ACCORDANCE WITH THE PROVISIONS OF TREASURY REGULATION SECTION 53.4942(A)-3(D)(2), THE ROBERTSON SCHOLARS LEADERSHIP PROGRAM HEREBY ELECTS TO TREAT \$8,814,090 OF THE QUALIFYING DISTRIBUTIONS MADE IN THE CURRENT TAXABLE YEAR ENDING JUNE 30, 2018 IN EXCESS OF THE PRIOR TAXABLE YEAR'S UNDISTRIBUTED INCOME AS A DISTRIBUTION MADE OUT OF CORPUS TO SATISFY THE REQUIREMENTS OF TREASURY REGULATION SECTION 53.4942(A)-3(C)(2)(I).

DR. ARRON STERN, TRUSTEE

THE ROBERTSON SCHOLARS LEADERSHIP PROGRAM

THE ROBERTSON SCHOLARS LEADERSHIP PROGRAM
FORM 990-PF
PAGE 7, PART IX-A: SUMMARY OF DIRECT CHARITABLE ACTIVITIES
LINE 1

The Robertson Scholars Leadership Program provides a yearly grant to both Duke University and UNC-Chapel Hill that funds many aspects of leadership development for a select group of undergraduate students. These students were selected based on their extraordinary potential for leadership and programmatic benefits include tuition, room and board, summer funding, and other leadership programming.

The Executive Director of the Program is directly involved in all aspects of the program. He coordinates all aspects of the selection process - from visiting various high schools throughout the country and abroad to meeting prospective candidates. A key aspect of scholar selection includes the coordination of Finalist Weekend which is the final event where scholar decisions are made.

The Executive Director also meets with current scholars to ensure that they are making progress in their chosen experiences as well as handling any disciplinary matters that might occur. He helps develop and coordinate all the events that the program hosts for the scholars throughout the year. Lastly, he oversees all aspects of the cross campus collaboration of the program – between the campuses and administrations of Duke University and UNC-Chapel Hill.

In fiscal year ended 6/30/18, there were 68 scholars attending UNC-Chapel Hill and 62 scholars attending Duke University.