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

	For	calend	lar year 2017 or tax year	beginning			, and e	nding				
	Name of foundation								A Employer identification number			
	-C	HAF	HARLES L. READ FOUNDATION									
		C/O SAUL EISENBERG , TREASURER mber and street (or P O box number if mail is not delivered to street address) Room/suite								22-6053510		
			•		Room/suite	1 .	hone number		(
			WOHSEEPEE I					L		73-373-58		{ {
			wn, state or province, cou SHORE, NY 1	untry, and 211 L 1706	or toreign p	ostai code			U If exe	mption applic tion is p	ending, check	here
			all that apply:	Initial return		Initial return of a f	ormer nublic o	harity	n 1 E	oreign organizations	chack hard	
	u	moon a	an that apply.	Final return	•	Amended return	ormer public (inarity	1.10	reigii organizations	s, check field	
				Address ch	зпае	Name change		ń	2. Fo	reign organizations me eck here and attach co	eting the 85%	test,
	H (Check	type of organization:	X Section	501(c)(3) ex	cempt private foundation		MI	7	vate foundation sta		
] Sec	tion 4947(a)(1) nonexem	pt charitable	trust	Other taxable private found	ation			r section 507(b)(1)		
			ket value of all assets at e	end of year	J Account	-	Accr	ual "	F If the	foundation is in a	60-month te	rmination
	-		art II, col. (c), line 16)	70467		ther (specify) nn (d) must be on cash bas			unde	er section 507(b)(1))(B), check h	nere ►L
		\$ • • • • • • • • • • • • • • • • • • •	Analysis of Revenue an		(raiti, colui		T		 	\ A d	(d) Dis	bursements
			(The total of amounts in colu- necessarily equal the amoun	mns (b), (c), and	d (d) may not	(a) Revenue and expenses per books	(b) Net in		(C) Adjusted net income	for charit	able purposes basis only)
			Contributions, gifts, grant							N/A		
\sim 1			Check X if the foundation		attach Sch B	<u> </u>	ļ				ļ	
ムロ	7	3	Interest on savings and tempo cash investments	-		84. 78797.	 	84.			STATEMENT 1	
√ [`			idends and interest from securities			 	<u>78797.</u>	 		STATE	MENT 2
2018		Ī .	Gross rents Net rental income or (loss)								- Table Strate Code	
	evenue		Net gain or (loss) from sale of	assets not on it	ne 10	250158.	 		-	RECEIV	ĘĎ "	
ଟ୍ରେ ୧୧୧		_ (Gross sales price for all assets on line 6a		9032.				ല	- A TOTAL	70	
	eve	ł	Capital gain net income (from	Part IV, line 2)			2	50158.	울	JUN 142	J18 X	
JUL,	Œ	8 1	Net short-term capıtal gaı	n					151		إيقال	
_		، ا	Income modifications Gross sales less returns							OGDEN,	UI I	
SCANNED		10a a	and allowances		·						 	
Z		1	_ess Cost of goods sold { Gross profit or (loss)	L			 				 	
A		l	Other income			1605.		1605.	 -		STATE	MENT 3
Š		* *	Total. Add lines 1 through	h 11		330644.	3	30644.				
		13 (Compensation of officers, dire	ctors, trustees,	etc	48000.		16000.				31759.
		[Other employee salaries a	•							<u></u>	
	ý	1	Pension plans, employee	benefits			<u> </u>				<u> </u>	
	nse	l	_egal fees	Cmi	MT 4	4500.	 	4500.			<u> </u>	
	xpe	l	Accounting fees Other professional fees	511	MT 4	4500.		4500.				0.
	ě E	ľ	nterest								 -	
	Administrative Expense		Taxes	ST	MT 5	377.		0.				0.
	nist	19 [Depreciation and depletion	n								
	Ë		Occupancy			3780.		3780.				0.
	ΨÞ	1	Travel, conferences, and r	meetings		393.		0.				0.
	and)	Printing and publications	CMI	ATTI 6	20114		27225				
	Operating	23 (Other expenses Fotal operating and admi		MT 6	28114.	<u></u>	27325.				0.
	Sera	. 27	expenses Add lines 13 th			85164.		51605.				31759.
	ŏ	25 (Contributions, gifts, grant		İ	159500.						159500.
			Total expenses and disbu									
			Add lines 24 and 25			244664.		51605.			<u> </u>	191259.
		27 8	Subtract line 26 from line	12:		0-000			!)	
			xcess of revenue over expens			85980.		70020				
			Vet investment income (if Adjusted net income (if ne				4	79039.		N/A		
			ratagred tier titentite (it be	ganve, enter -t	·/					-1/44		

723501 01-03-18 LHA For Paperwork Reduction Act Notice, see instructions.

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	
Part II Balance Sheets column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
1 Cash - non-interest-bearing	116115.	110710.	110710.
2 Savings and temporary cash investments	3336085.	3668757.	<u>3668757.</u>
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			
c Investments - corporate bonds			_
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)	3452200.	3779467.	<u>3779467.</u>
17 Accounts payable and accrued expenses			
18 Grants payable			
g 19 Deferred revenue			
20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other habilities (december 1)			
21 Mortgages and other notes payable			
□ 22 Other liabilities (describe ►)			
23 Total liabilities (add lines 17 through 22)	0.	0.	
Foundations that follow SFAS 117, check here			
and complete lines 24 through 26, and lines 30 and 31.	ļ		
24 Unrestricted 25 Temporarily restricted 26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 27 Capital stock, trust principal, or current funds			
25 Temporarily restricted			
26 Permanently restricted			
Foundations that do not follow SFAS 117, check here	1		
and complete lines 27 through 31			
27 Capital stock, trust principal, or current funds	3452200.	3779467.	
27 Capital stock, trust principal, or current timus 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	0.	0.	
Retained earnings, accumulated income, endowment, or other funds	0.	0.	
30 Total net assets or fund balances	3452200.	3779467.	
31 Total liabilities and net assets/fund balances	3452200.	3779467.	
Part III Analysis of Changes in Net Assets or Fund E	Balances		
1 Total net assets or fund balances at beginning of year - Part II, column (a), line	: 30		245220
(must agree with end-of-year figure reported on prior year's return)		1	3452200.
2 Enter amount from Part I, line 27a		2	85980.
3 Other increases not included in line 2 (itemize)		3	2539190
4 Add lines 1, 2, and 3		4	3538180.
5 Decreases not included in line 2 (itemize) C. Tatal not recent or find belonges at end of year (line 4 many line 5). Part II a	alumn (h) lina 20	5	241287. 3779467.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, c	oranni (b), inte 30		Form 990-PF (2017)

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Part IV Capital Gains ar	nd Losses for Tax on In	vestmen	t Income						
	e kind(s) of property sold (for exame house; or common stock, 200 shs		ite,	(b) D	How ac - Purcl - Dona	quired hase ition	(c) Date (mo., d	acquired ay, yr.)	(d) Date sold (mo., day, yr.)
1a									
b SEE ATTACHED	STATEMENT								
_ C									
<u>d</u>				-					
<u>e</u>				L.,					
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale					ain or (loss s (f) minus (
<u>a</u>		<u></u>							
<u>b</u>									
<u> </u>									
1040022			70007	4					250150
e 1049032. Complete only for assets showing	goin in column (h) and owned by	the foundation	79887	4.			0 - 40) - 1 - (h)	250158.
Complete only for assets showing		r				(I)	Gains (C (k) hut i	ol. (h) gain not less thai	minus n -0-1 or
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (i) col. (j), if any		<u> </u>		Losses	(from col. (h))
<u>a</u>									
<u>b</u>									
<u>c</u>									
d									050450
e									250158.
2 Capital gain net income or (net capit	tal loss) $ \begin{cases} \text{If gain, also enter} \\ \text{If (loss), enter -0-} \end{cases} $	n Part I, line In Part I, line	7 7	}	2				250158.
3 Net short-term capital gain or (loss)	as defined in sections 1222(5) an	d (6):							
If gain, also enter in Part I, line 8, co	lumn (c).				1				
Part V Qualification Un	der Cection 4040(e) for	Dadwaad	L Tay on Not	1	3	ant Inc		N/A	· · · · · · · · · · · · · · · · · · ·
						ient ince	JITIE		
(For optional use by domestic private for	oundations subject to the section 4	1940(a) tax on	i net investment in	come	9.)				
If section 4940(d)(2) applies, leave this	part blank.								
Was the foundation liable for the section	n 4942 tax on the distributable am			od?					Yes X No
If "Yes," the foundation doesn't qualify L									
1 Enter the appropriate amount in each		istructions de	fore making any ei						(4)
Base periód years	(b) Adjusted qualifying dist	tributions	Net value of no	(C)		uca accate		Distrib	(d) ution ratio
Calendar year (or tax year beginning	<u> </u>		Net value of flor	IIUIIai				(col. (b) div	ided by col. (c))
2016		88433.				75984			.054210
2015		81324.				58840.			.052423
2014		48500.				387 <u>42</u>			
2013		34500.				79282			
2012		<u>35000.</u>			29	<u>64259</u>	· -		.045543
2 Total of line 1, column (d)							2		.234002
3 Average distribution ratio for the 5-y the foundation has been in existence		on line 2 by 5.0), or by the numbe	er of y	years		3		.046800
4 Enter the net value of noncharitable-	use assets for 2017 from Part X, I	ine 5					4		3673308.
5 Multiply line 4 by line 3					5		171911.		
6 Enter 1% of net investment income (1% of Part I, line 27b)					6		2790.		
7 Add lines 5 and 6	, , , , , , , , , , , , , , , , , , , ,						7		174701.
	Sout VIII to a A								
8 Enter qualifying distributions from P If line 8 is equal to or greater than lin		1b. and comp	lete that part using	n a 1º	% tax r:	ate.	8		191259.
See the Part VI instructions.		and comp	ioto tilat part abilit		, v tun I				

CHARLES L. READ FOUNDATIO Form 990-PF (2017) TREASURER C/O SAUL EISENBERG 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 \(\bigs\) and enter "N/A" on line 1. Date of ruling or determination letter: (attach copy of letter if necessary-see instructions) 2790. b Domestic foundations that meet the section 4940(e) requirements in Part V, check here \(\bigs X\) and enter 1% of Part I, line 27b 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-) 3 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-6 Credits/Payments: 3465. a 2017 estimated tax payments and 2016 overpayment credited to 2017 b Exempt foreign organizations - tax withheld at source 6b 0. 0. c Tax paid with application for extension of time to file (Form 8868) 6c 1486 d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 4951. 8 Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached 8 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 2161. 10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 2161 . Refunded 11 Enter the amount of line 10 to be: Credited to 2018 estimated tax Part VII-A Statements Regarding Activities Yes No 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a X b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition 16 If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. X c Did the foundation file Form 1120-POL for this year? 1c d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 0. (2) On foundation managers. > \$ (1) On the foundation. > \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$ 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 X If "Yes," attach a detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes X 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a b If "Yes," has it filed a tax return on Form 990-T for this year? N/A 4b X 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T

723531 01-03-18

X

8b

Form **990-PF** (2017)

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:

8a Enter the states to which the foundation reports or with which it is registered. See instructions.

of each state as required by General Instruction G? If "No," attach explanation

By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law

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

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)

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresse:

year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for caleridar

· By language in the governing instrument, or

remain in the governing instrument?

C/O SAUL EISENBERG , TREASURER

Part VII-A Statements negariting Activities (continued)		1	
		Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of	Ì	1 1	
section 512(b)(13)? If "Yes," attach schedule. See instructions	11		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?	ŀ	} }	
If "Yes," attach statement. See instructions	12		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	_X_	
Website address ► N/A			
14 The books are in care of ► SAUL EISENBERG Telephone no. ► 631			
Located at ► 111 WOHSEEPEE DRIVE, BAYSHORE, NY ZIP+4	<u> 11706</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here			· []
and enter the amount of tax-exempt interest received or accrued during the year	<u>N</u>	<u>/A</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,		Yes	_
securities, or other financial account in a foreign country?	16_	Lj	X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	l	1	
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.		Yes	No
1a During the year, did the foundation (either directly or indirectly):	Ì	1 1	
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	lo		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	1		
a disqualified person?	lo		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	lo	1	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	lo		
(5) Transfer any income or assets to a disqualified person (or make any of either available	ļ]	
for the benefit or use of a disqualified person)?	io	} {	
(6) Agree to pay money or property to a government official? (Exception. Check "No"	1]]	
If the foundation agreed to make a grant to or to employ the official for a period after	ì	1 1	
termination of government service, if terminating within 90 days.)	io		
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 N/2	A 1b		
Organizations relying on a current notice regarding disaster assistance, check here	<u>ئ</u> ا		
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 2017?	10		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	1.0		
defined in section 4942(j)(3) or 4942(j)(5)):			
a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning			
before 2017?	lo		
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		1	
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.)	A 2b		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	` <u> 20</u>		
	1		
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	١		
· ·	1		
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,	1		
) at		
		├──┼	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 5. Bid the foundation make any investment in a prior year (but offer December 21, 1050) that equild incording its observable purpose that	4a		<u>X</u> _
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	46		х
had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b Form 99 0)-PF /	

Form 990-PF (2017) C/O SAUL EISENBERG , TRE	ASURER		22-60535	10 .	Page 6			
Part VII-B Statements Regarding Activities for Which	Form 4/20 May Be I	Required (contin	ued)	- Va	al Na			
5a During the year, did the foundation pay or incur any amount to:	40.454.330	г 	(Ye	s No			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	* **	_	es 🗶 No	- 1	- {			
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly,								
any voter registration drive?								
(3) Provide a grant to an individual for travel, study, or other similar purposes		Y	es X No	į	- 1			
(4) Provide a grant to an organization other than a charitable, etc., organization	in described in section			}	İ			
4945(d)(4)(A)? See instructions			es X No		1			
(5) Provide for any purpose other than religious, charitable, scientific, literary,	, or educational purposes, or t			1				
the prevention of cruelty to children or animals?			es X No		1			
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify uni	der the exceptions described	ın Regulations	. 1		1			
section 53.4945 or in a current notice regarding disaster assistance? See instr	uctions		N/A	5b				
Organizations relying on a current notice regarding disaster assistance, check	here				- [
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f	rom the tax because it mainta	ıned						
expenditure responsibility for the grant?	N	I/A L Yo	es 💹 No 📗	ļ				
If "Yes," attach the statement required by Regulations section 53.4945-5(d).			ļ	ļ	1			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on		}	}	1			
a personal benefit contract?		Y	es X No)	1			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	personal benefit contract?		1	6b	x			
If "Yes" to 6b, file Form 8870.			Ī					
7a At any time during the tax year, was the foundation a party to a prohibited tax s	shelter transaction?	Ye	es X No					
b If "Yes," did the foundation receive any proceeds or have any net income attribu				7b	1			
Part VIII Information About Officers, Directors, Trust		nagers, Highl						
Paid Employees, and Contractors	•							
1 List all officers, directors, trustees, and foundation managers and t	heir compensation.							
	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) E	xpense nt, other			
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation	accou	nt, other vances			
KATHRYN GALTON	SECY	1						
249 MILLBURN AVENUE		1						
MILLBURN, NJ 07041	5.00	12000.	0.		0.			
	PRES							
249 MILLBURN AVENUE		ţ						
MILLBURN, NJ 07041	5.00	12000.	0.		0.			
SAUL EISENBERG	TREAS	120000						
249 MILLBURN AVENUE	TILLIS	•						
MILLBURN, NJ 07041	5.00	12000.	0.		0.			
	V.P	12000.	<u> </u>					
249 MILLBURN AVENUE	V • E)						
MILLBURN, NJ 07041	5.00	12000.	0.		٥			
2 Compensation of five highest-paid employees (other than those inc	Juded on line 1) If none	enter "NONE "			<u> </u>			
	,		(d) Contributions to	(e) F	xpense			
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	accou	xpense nt, other			
MONE	devoted to position	ļ	compensation	allow	vances			
NONE		}						
			<u> </u>	L				
]	i					
		 						
		 	 					
	·							
	L	[
Total number of other employees paid over \$50,000			▶↓_		0			
			Form	990-PI	F (2017)			

Part VIII Information About Officers, Directors, Trustees, Foun Paid Employees, and Contractors (continued)	dation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, er	nter "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 stanumber of organizations and other beneficiaries served, conferences convened, research papers papers papers.	atistical information such as the produced, etc.	Expenses
1 NONE		
2		0.
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 NONE		0
2		0.
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3	>	0.
		Form 990-PF (2017)

CHARLES L. READ FOUNDATION Form 990-PF (2017) C/O SAUL EISENBERG , 22-605351 Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions) 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 <u>3615834.</u> 1a 113413. b Average of monthly cash balances 1b c Fair market value of all other assets 10 3729247. d Total (add lines 1a, b, and c) 10 e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) 1e Acquisition indebtedness applicable to line 1 assets Subtract line 2 from line 1d 3 55939. Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 3673308. 5 183665. Minimum investment return. Enter 5% of line 5 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.) 183665. Minimum investment return from Part X, line 6 2790. Tax on investment income for 2017 from Part VI, line 5 Income tax for 2017. (This does not include the tax from Part VI.) 2b 2790. c Add lines 2a and 2b Distributable amount before adjustments. Subtract line 2c from line 1 3 180875. Recoveries of amounts treated as qualifying distributions 18087 Add lines 3 and 4 5 6 Deduction from distributable amount (see instructions) 6 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 180875 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 191259. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 b Program-related investments - total from Part IX-B 1b 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 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 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4 191259. 4

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

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

Form **990-PF** (2017)

6

<u> 2790.</u>

188469.

income. Enter 1% of Part I, line 27b

Adjusted qualifying distributions. Subtract line 5 from line 4

4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

1 Distributable amount for 2017 from Part XI, line 7 2 Undistributed income, if any, as of the end of 2017 a Enter amount for 2016 only b Total for prior years: , , , O. 3 Excess distributions carryover, if any, to 2017: a From 2012 b From 2013 c From 2014 d From 2015 e From 2016 1 1 2 2 5 2 . e From 2016 f Total of lines 3a through e 4 Qualifying distributions for 2017 from Part XII, line 4: ▶\$ 191259.	(d) 017
2 Undistributed income, if any, as of the end of 2017 a Enter amount for 2016 only b Total for prior years: , , , , O. 3 Excess distributions carryover, if any, to 2017: a From 2012 b From 2013 c From 2014 d From 2015	
a Enter amount for 2016 only b Total for prior years:	180875.
b Total for prior years: , , , , , , , , , , , , , , , , , , ,	
3 Excess distributions carryover, if any, to 2017: a From 2012 b From 2013 c From 2014 d From 2015 e From 2016 1	
3 Excess distributions carryover, if any, to 2017: a From 2012 b From 2013 c From 2014 d From 2015 e From 2016 1 Total of lines 3a through e 27538. 4 Qualifying distributions for 2017 from	
a From 2012 b From 2013 c From 2014 d From 2015 e From 2016 1 Total of lines 3a through e 4 Qualifying distributions for 2017 from	
b From 2013 c From 2014 d From 2015 e From 2016 f Total of lines 3a through e 4 Qualifying distributions for 2017 from	
c From 2014 d From 2015 e From 2016 f Total of lines 3a through e 4 Qualifying distributions for 2017 from	
d From 2015 e From 2016 15286. f Total of lines 3a through e 27538. 4 Qualifying distributions for 2017 from	
e From 2016 15286. f Total of lines 3a through e 27538. 4 Qualifying distributions for 2017 from	
f Total of lines 3a through e 27538. 4 Qualifying distributions for 2017 from	
4 Qualifying distributions for 2017 from	
Part XII, line 4: ►\$ 191259.	
a Applied to 2016, but not more than line 2a	
b Applied to undistributed income of prior	
years (Election required - see instructions)	
c Treated as distributions out of corpus	
(Election required - see instructions) 0 •	
	180875.
e Remaining amount distributed out of corpus 10384.	
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	0.
6 Enter the net total of each column as indicated below:	
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	
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 O.	
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 instr.	
f Undistributed income for 2017. Subtract	
lines 4d and 5 from line 1. This amount must	
be distributed in 2018	0.
7 Amounts treated as distributions out of	
corpus to satisfy requirements imposed by	
section 170(b)(1)(F) or 4942(g)(3) (Election	
may be required - see instructions) 0.	
8 Excess distributions carryover from 2012	
not applied on line 5 or line 7	
9 Excess distributions carryover to 2018.	
Subtract lines 7 and 8 from line 6a 37922.	
O Analysis of line 9:	
a Excess from 2013	
b Excess from 2014	
c Excess from 2015 12252.	
d Excess from 2016 15286.	
e Excess from 2017 10384.	

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Form **990-PF** (2017)

C/O SAUL EISENBERG . TREASURER

3 Grants and Contributions Paid During the		Poumont		
Recipient	If recipient is an individual.	7	T	
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		
a Paid during the year		Į.		
	,	t		
		•	+	
SEE ATTACHED SCHEDULE	NONE	PUBLIC	FOR PURCHASE OF	
249 MILLBURN AVENUE			CAPITAL ITEMS	
MILLBURN, NJ 07041		}		159500
		Ì		
		-		
		t		
			ļ	
		 		
		1		
			ł	
		1		
		 		
				I
				1
	<u> </u>	<u> </u>		
Total			<u>▶ 3a</u>	159500.
b Approved for future payment	}			
			{	
NONE		}		
			}	
	}		j	
		-		
		1		
		1		
	 	 	 	
		}		
		1		
		1		
Total			> 3b	<u> </u>
			Fo	orm 990-PF (2017)

Part XVI-A	Anal	vsis of	Income-	-Producing	Activities
1 016 1191 11	* *******	, 0,0 0,	111001110	I I VUUVIII M	

	Lloralated b				
Enter gross amounts unless otherwise indicated.	(a) Business	ousiness income (b) Amount	(C) Exclu- sion	(d) Amount	(e) Related or exempt function income
1 Program service revenue:	code		code	Amount	
a	-		 		
b	l J		+		
·			1		
	,		 		
e	-		1-1-		
g Fees and contracts from government agencies	_		 		
2 Membership dues and assessments			t-t		·
3 Interest on savings and temporary cash					
investments				l	84.
4 Dividends and interest from securities			1-1-		78797.
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					1605.
8 Gain or (loss) from sales of assets other	1		1 1		
than inventory	<u> </u>		 		250158.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory	 		╂		
11 Other revenue:	[1 1		
å			 		
b					
c			+-+-		
d	-		 		
12 Subtotal. Add columns (b), (d), and (e)	_	0.	 - -	0.	330644.
13 Total. Add line 12, columns (b), (d), and (e)			L	13	
(See worksheet in line 13 instructions to verify calculations.)				333411
Part XVI-B Relationship of Activities		nlichment of Ex	compt D	umococ	
rait XVI-D Helationship of Activities	S to the Accom	ibiigiililetif oi Ex	rempt P	urposes	
Line No. Explain below how each activity for which in			contribute	d importantly to the accomp	olishment of
the foundation's exempt purposes (other th	an by providing funds	for such purposes).			
					·
					
					
					
					
					
		·			

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Form 990-PF (2017) C/O SAUL EISENBERG , TREASURER 22-6053510 Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

1 . Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)							Yes	No
		nizations) or in section 527, relatin	-					
	, .	lation to a noncharitable exempt or	ganization of:			4 . 743		77
(1) Ca	ther assets					1a(1)		X
• •	ransactions:					1a(2)		
	ales of assets to a noncharita	able exempt organization				1b(1)		Х
		oncharitable exempt organization				1b(2)		X
• •	ental of facilities, equipment,					1b(3)		X
	eimbursement arrangements					1b(4)		X
	oans or loan guarantees					1b(5)		X
(6) Pe	erformance of services or me	embership or fundraising solicitatio	ons			1b(6)		X
c Sharin	g of facilities, equipment, ma	ailing lists, other assets, or paid em	ployees			1c		X
		"Yes," complete the following sch					ets,	
		foundation. If the foundation receiv		ın any transaction	or sharing arrangement, sh	ow in		
		other assets, or services received.						
(a) Line no	(b) Amount involved	(c) Name of noncharitable	e exempt organization	(d) Description	of transfers, transactions, and sh	aring an	angeme	nts
		N/A		ļ				
	 	 		 				
				 				
				 				
		 		 				
		 		 		-		
+	 			 				
		 		 				
				 				
								
								
	,							
	 	<u> </u>		L				
		tly affiliated with, or related to, one	or more tax-exempt organiza	tions described		,		_
		on 501(c)(3)) or in section 527?			<u></u>	Yes	X	No
b If "Yes,	" complete the following sche							
	(a) Name of org	janization	(b) Type of organization		c) Description of relationship			
	N/A		ļ		 			
								
								
Un	der penalties of perjury, I declare t	that I have examined this return, including	g accompanying schedules and sta	atements, and to the	best of my knowledge			
Sign and	d belief, it is true, correct and con	plete Declaration of preparer (other than	n taxpayer) is based on all informati	ion of which preparer	has any knowledge May to return	ne IRS d	scuss the prepare	nis er
Here	/m/~	m - was	06/07/2018	TREASU	RER Snowr	Yes	See ins	No
\$	ignature of officer or trustee		Date	Title		1.03		
	Print/Type preparer's na	ame Preparer's si	gnature of	Date	Check X if PTIN			
	,		MI.	1	self- employed			
Paid	SAUL EISEN	BERG	4V40	6/06/18	P01	382	250	
Prepare	Firm's name > SAU	L EISENBERG			Firm's EIN ► 13-67.			
Use Onl	y							
	Firm's address ▶ 11	1 WOHSEEPEE DRI	VE					
	BA	YSHORE, NY 1170	6		Phone no. 631 660			
					Forr	_n 990	-PF	2017)

Part IV Capital Gains and Lo	osses for Tax on Investment Income	<u> </u>			
(a) List an 2-story b	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)		
1a MORGAN STANLEY	P				
b MORGAN STANLEY		P			
c SANFORD BERNST		P			
d SANFORD BERNST	EIN ACCT # 888-0	08702	P		
<u>e</u>				ļ	
f CASH IN LIEU			P	ļ	
	21-42-001-200453	35	P		
	DIVIDENDS			<u> </u>	
				 	
k			- 		
_ ``				 	
m					
0					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale) Gain or (loss) blus (f) minus (g)	
a 276693.		288510.			<11817.
b 214532.		191258.			23274.
c 56908.		56705.			203.
d 236926.		169077.			67849.
<u>e</u>	 	 			0.
f 50.		02224			50.
g 255097. h 8826.		93324.			161773. 8826.
1	 	 			0020.
- 	 				
k	1				
m					
n					
0	<u> </u>]			
Complete only for assets show	ng gain in column (h) and owned by		(I) Los	sses (from col. (h))	ant (k)
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (I) over col. (J), if any	but n	of col. (h) gain over not less than "-0-")	
a					<11817.
<u>b</u>		 			23274.
<u>c</u>	 	 			203.
<u>d</u>	 	 			67849.
<u>e</u>	 	 			<u>0.</u> 50.
<u>f</u>	 	 			161773.
<u>g</u> h		 	·		8826.
<u>"</u>	 	 			
k					
<u>m</u>					
n	<u> </u>				
0	L				
2 Capital gain net income or (net ca	apital loss) { If gain, also enter "-f	r in Part I, line 7)-" in Part I, line 7	2		250158.
If gain, also enter in Part I, line 8,		nd (6):			
If (loss), enter "-0-" in Part I, line	8	J 1	3	N/A	

FORM 990-PF INTERE	ST ON SAVING	S AND T	EMPORA	RY CASH	INVESTMENT	S STA	ATEMENT	1
SOURCE		VENUE NET INVES		(B) INVESTMENT INCOME	ESTMENT ADJUSTE			
MORGAN STANLEY SMIT 033-061389214 PNC BANK ACCT # 351 SANFORD BERNSTEIN A 888-8702		5	7. 3.	7. 53. 24.				
TOTAL TO PART I, LI	84.		84.					
FORM 990-PF	DIVIDENDS	AND INT	EREST	FROM SEC	CURITIES	STA	ATEMENT	2
SOURCE	GROSS AMOUNT	GAINS REV		(A) REVENUI PER BOOI				
DIVIDEND INCOME PNC BANK AS CUSTODIAN EQUITY DIVIDENDS S.BERNSTEIN	25 4 30. 29763.		112.	2331 2519		318.		
MORGAN STANEY SMITH BARNEY DIVIDENDS	32430.	2	142.	3028	38. 302	288.		
TO PART I, LINE 4	87623.	8	826.	7879	787	797.		
FORM 990-PF		OTHER	INCOM			STA	TEMENT	3
DESCRIPTION			REV	A) ENUE BOOKS	(B) NET INVEST MENT INCOM		(C) ADJUSTEI IET INCOI	
NON DIVIDEND DISTRI	BUTIONS MORG	AN		1605.	160)5.		
TOTAL TO FORM 990-PF, PART I, LINE 11				1605.	160)5.		

FORM 990-PF	ACCOUNTI	NG FEES	STATEMENT 4		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING	4500.	4500.		0.	
TO FORM 990-PF, PG 1, LN 16B	4500.	4500.		0.	
FORM 990-PF	TAXES		STATEMENT 5		
DESCRIPTION	EXPENSES	(B) NET INVEST- MENT INCOME	ADJUSTED	CHARITABLE	
NJ EMPLOYMENT TAX	377.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	377.	0.		0.	
FORM 990-PF	OTHER E	XPENSES	S	FATEMENT 6	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MORGAN STANLEY ADVISORY FEE	13208.	13208.		0.	
SANFORD C BERNSTEIN MGT FEES	9724.			0.	
PNC BANK CUSTODIAL FEE DUES	4000. 85.			0.	
INSURANCE BANK CHARGES	789. 308.	0.		0.	
TO FORM 990-PF, PG 1, LN 23	28114.	27325.		0.	

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A THROUGH 2D

STATEMENT

7

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

RODGER K HERRIGEL 249 MILLBURN AVENUE MILLBURN, NJ 07041

TELEPHONE NUMBER

973- 379-5850

FORM AND CONTENT OF APPLICATIONS

APPLICANTS SHOULD SUBMIT A BRIEF RESUME OF ACTIVITIES FOR WHICH THE GRANT IS DESIRED. THE LATEST FINANCIAL STATEMENT AND COPY OF IRS EXEMPTION LETTER SHOULD BE SENT AT THE SAME TIME.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

NONE