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.

OMB No 1545-0052

| - | | rtment of the Treasury | | | social security numbers or rs.gov/Form990PF for inst | | | Open to Public Inspection | | |
|---------|--|---|---|--------------------|--|--|---|--|--|--|
| | | calendar vear 2018 | or tax year beginning | GO to www.i | rs.gov/FormssorF for insi | , and ending | ormation. | Open to Public Inspection | | |
| | | me of foundation | | <u> </u> | | , | A Employer identification | ver identification number | | |
| | | | A. AND LO | IS G. | | | | | | |
| | | RODSKY FO | | | | | 23-2785280 | | | |
| | | | ox number if mail is not de | elivered to street | address) | Room/suite | B Telephone number | | | |
| | 1 | 701 JOHN | F. KENNEDY | BLVD. | , 52ND FL | | (215)665-1 | 700 / | | |
| | City or town, state or province, country, and ZIP or foreign postal code | | | | | | C if exemption application is p | . 1 14 | | |
| | | HILADELPH | | 103 | | | | • | | |
| | GC | Check all that apply: | Initial retur | n | Initial return of a f | ormer public charity | D 1 Foreign organizations | , check here | | |
| | | | Final return | 1 | Amended return | | | | | |
| | | | Addréss ch | ange | Name change | | 2 Foreign organizations me check here and attach co | mputation | | |
| - | H C | check type of organiz | | | kempt private foundation | 04 | E If private foundation stat | us was terminated | | |
| | \perp | |) nonexempt charitable | | Other taxable private found | ation | under section 507(b)(1) | (A), check here | | |
| | | Fair market value of all assets at end of year J Accounti | | - | Accrual | F If the foundation is in a 6 | | | | |
| | | rom Part II, col. (c), li | ne 16) | | ther (specify) | | under section 507(b)(1) | (B), check here | | |
| | | -\$ 2 | 2,644,842. | (Part I, colun | nn (d) must be on cash bas | | | /d\ = . | | |
| | Жs | ——— (The total of amo | evenue and Expenses ounts in columns (b), (c), an | id (d) may not | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net | (d) Disbursements for charitable purposes | | |
| | | | al the amounts in column (a | ·· | 1,558,200. | | N/A | (cash basis only) | | |
| ` | | I — | gifts, grants, etc., rece | | 1,336,200. | | | | | |
| | | nterest on saving | if the foundation is not required t is and temporary | o attach Sch B | 45 157 458 456 1, 145 858 848 458 154 154 154 154 154 154 154 154 154 154 | (%) | 24000 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 | 10.00 m 20.00 m | | |
| | | 4 Dividends and | : interest from securities | , | 516,065. | 516,065. | | STATEMENT 1 | | |
| | | 5a Gross rents | interest nom securities | , | 310,0031 | 310,003. | | | | |
| | | D Net rental income | or (loss) | | 62206.4512.0636.363 | | | | | |
| | | 6a Net gain or (loss) | from sale of assets not on | line 10 | 1,340,525. | | XXX 200 | THE PERSON NAMED IN THE PERSON NAMED IN | | |
| | ure: | b Gross sales price assets on line 6a | | ,093. | | | F | CFIVED | | |
| | Revenue | | come (from Part IV, line 2) | | | 1,340,525. | | | | |
| | Œ | 8 Net short-term | capital gain | | | 元为你不是不知的 | | 6 20 10 10 | | |
| Ŝ | | 9 Income modific | | 1 | | | AM (S) | N. Colonia Colo | | |
| SCANNED | | 10a Gross sales less r | eturns | | | | | | | |
| Ź | | b Less Cost of goo | ds sold | | | | OC | DENTU | | |
| Z | | c Gross profit or | (loss) | | | | | 252470-300000000000000000000000000000000000 | | |
| ö | | 11 Other income | | | 2 414 700 | 1 056 500 | | | | |
| | | 12 Total, Add line | | | 3,414,790. 75,000. | 1,856,590. | | 0. | | |
| JUN | | · · | officers, directors, trustees | s, etc | 75,000. | 0. | | • | | |
| Z | | 14 Other employed | e salaries and wages | | | | , | | | |
| 0 | es | 16a Legal fees | | мт 2 | 6,500. | 0. | <u></u> | 0. | | |
| ಅ | | b Accounting fee | . | MT 3 | 6,477. | 0. | | 0. | | |
| 2019 | Expens | c Other profession | | MT 4 | 39,587. | 39,587. | | 0. | | |
| 9 | ve | 17 Interest | | | | · | | | | |
| | rati | 18 Taxes | ST | MT 5 | 36,207. | 6,207. | | 0. | | |
| | Administrative | 19 Depreciation ar | nd depletion | | | | | 79.57.27.19.74.67.46 | | |
| | Ē | 20 Occupancy | | | 4 | | | | | |
| | ΑĠ | 21 Travel, confere | nces, and meetings | | | | | | | |
| | and | 22 Printing and pu | | _ | , | | | | | |
| | ng | 23 Other expenses | | MT 6 | 5,400. | 5,400. | | 0. | | |
| | Operating | | g and administrative | ٠. | 1.60 4.71 | F1 104 | , | • | | |
| | adc | I | l lines 13 through 23 | | 169,171. | 51,194. | | 0. 1,151,250. | | |
| | _ | 25 Contributions, | | | 1,151,250. | | Carlo | 1,151,250. | | |
| | | | s and disbursements. | | 1 220 421 | E1 10/ | | 1,151,250. | | |
| | _ | Add lines 24 ar | | | 1,320,421. | 51,194. | Section and an experience | 450000000000000000000000000000000000000 | | |
| | | 27 Subtract line 26 | | | 2,094,369. | | | | | |
| | | , | e over expenses and disbu tincome (if negative, ent | | 2,074,303. | 1,805,396. | 1.25.25.25.25.25.25.25.25.25.25.25.25.25. | | | |
| | | | Tillcome (if negative, enter- | | 22.00.00.00.00.00.00.00.00.00.00.00.00.0 | 1,005,550. | N/A | CANAL | | |
| | | 1 - 110,000,00 1101 11 | , | - 1 | Tanan to eminor and property of applications of the control of the | \$ | , | LOCATION OF THE STREET STATE OF THE PARTY OF | | |

823501 12-11-18 LHA For Paperwork Reduction Act Notice, see instructions

Form **990-PF** (2018)

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Form 990-PF (2018)

THE JULIAN A. AND LOIS G. BRODSKY FOUNDATION

| Balance Sheets Attached schedules and amounts in the description column should be for end of year amounts only | | | Beginning of year | End o | of year | | |
|--|----------|---|-------------------|--------------------------------|---|--|--|
| * 14 | arπ∘ | column should be for end of year amounts only | (a) Book Value | (b) Book Value | (c) Fair Market Value | | |
| | 1 | Cash - non-interest-bearing | | , | | | |
| | 2 | Savings and temporary cash investments | 1,175,285. | 1,138,647. | 1,138,647. | | |
| | 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 | | | b | | |
| ş | 8 | Inventories for sale or use | | | | | |
| Assets | 9 | Prepaid expenses and deferred charges | | | | | |
| ⋖ | 10a | Investments - U.S. and state government obligations | | | | | |
| | b | Investments - corporate stock STMT 8 | 13,109,580. | 13,657,328. | 20,813,458. | | |
| | C | Investments - corporate bonds | | | | | |
| | 11 | Investments land, buildings, and equipment basis | | | | | |
| | | Less accumulated depreciation | | | | | |
| | 12 | Investments - mortgage loans | 505.404 | 5.14 0.60 | 600 808 | | |
| | 13 | Investments - other STMT 9 | 507,121. | 541,860. | 692,737. | | |
| | 14 | Land, buildings, and equipment basis | | | | | |
| | | Less accumulated depreciation | | | | | |
| | 1 | Other assets (describe) | | | | | |
| | 16. | Total assets (to be completed by all filers - see the | 14 701 006 | 15,337,835. | 22 644 942 | | |
| _ | 17 | instructions. Also, see page 1, item I) | 14,791,986. | 13,337,633. | 22,644,842. | | |
| | 17 18 | Accounts payable and accrued expenses | | | SASSACIA WAS EN AND A | | |
| /A | 19 | Grants payable Deferred revenue | | | P. S. | | |
| Lrabilitres | 20 | Loans from officers, directors, trustees, and other disqualified persons | | | | | |
| Ē | 21 | Mortgages and other notes payable | | | | | |
| ڐ | l | 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. | | | | | |
| ances | 24 | Unrestricted | | | | | |
| | 25 | Temporarily restricted | | | | | |
| Ba | 26 | Permanently restricted | | | | | |
| Fund Ba | | Foundations that do not follow SFAS 117, check here | | | | | |
| | | and complete lines 27 through 31. | | | | | |
| ts | 27 | Capital stock, trust principal, or current funds | 0. | 0. | | | |
| Net Assets or | 28 | Paid-in or capital surplus, or land, bldg., and equipment fund | 0. | 0. | | | |
| Ϋ́ | 29 | Retained earnings, accumulated income, endowment, or other funds | 14,791,986. | 15,337,835. | | | |
| ž | 30 | Total net assets or fund balances | 14,791,986. | 15,337,835. | 87777 87724 1971 PR 157 1984 Sales Sales S | | |
| | | - | 14,791,986. | 15 227 025 | | | |
| _ | 31 | Total liabilities and net assets/fund balances | 15,337,835. | BEESE 1882 16 22 (BEE) 23/48/1 | | | |
| = | ärt | | | | | | |
| | | net assets or fund balances at beginning of year - Part II, column (a), line | 30 | | 14 504 005 | | |
| | • | st agree with end-of-year figure reported on prior year's return) | | 1 | 14,791,986. | | |
| | | r amount from Part I, line 27a | | 2 | 2,094,369. | | |
| | | r increases not included in line 2 (itemize) TIMING DIFF | ERENCES | 3 | 49,152. | | |
| | | lines 1, 2, and 3 | ann am | AMEMENTO 7 | 16,935,507. | | |
| | | eases not included in line 2 (itemize) I net assets or fund balances at end of year (line 4 minus line 5) - Part II, c | | $\frac{\text{ATEMENT 7}}{6}$ | 1,597,672. | | |
| 0 | rota | Form QQD-DF (2018) | | | | | |

Form 990-PF (2018)

BRODSKY FOUNDATION

23-2785280

Page 3

| 2-Story Drick wa | | of property sold (for exar or common stock, 200 shs | | te, | (6) F | low ac - Purc - Dona | quired hase ation | | acquired ay, yr.) | (d) Date sold (mo., day, yr) |
|--|--|---|---|--------------------------------------|--------------------------------------|--------------------------------|----------------------------------|-------------|--------------------------|--|
| 1a | | | | | Ħ | | | | | |
| b SEE ATTACHED | STAT | TEMENT | | | | | | | | |
| С | | | | | | | | | | |
| d | | | | | | | | | | |
| е | | | | | | | · | | | |
| (e) Gross sales price | (e) Gross sales price (f) Depreciation allowed (or allowable) (g) Cost or other basis plus expense of sale | | | | | ain or (loss s (f) minus | | | | |
| <u>a</u> | | | | | | | | | | |
| b | — | | | | | | | | | |
| <u>C</u> | | | | | | | | | | |
| d 5,258,093. | | | | 3,917,56 | R | | | | | 1,340,525. |
| e 5,258,093. | no dain in i | column (h) and owned by | | | - | | |) Gains (C | oi. (h) gain | |
| Complete only for access one will | 1 | (j) Adjusted basis | | cess of col. (i) | | | | (k), but r | not less tha | n -0-) or |
| (i) FMV as of 12/31/69 | ۱ ' | as of 12/31/69 | | col. (j), if any | | | | Losses | (from col. (| h)) |
| a | | | | | \rightarrow | | | | | |
| <u> </u> | | | | | | | | | | |
| c | - | | | | _ | | | | | * |
| - d | | | | | | | | | | |
| e | | | | | \neg | | | | | 1,340,525. |
| | | C If goin, also enter | ın Dart I line | 7 | T | | | | | <u> </u> |
| 2 Capital gain net income or (net ca | apital loss) | $ \begin{cases} \text{If gain, also enter} \\ \text{If (loss), enter -0-} \end{cases} $ | - in Part I, line | , 7 | <u>}</u> | 2 | | | | 1,340,525. |
| 3 Net short-term capital gain or (los | ss) as defii | ` | | | 1 | | | | | |
| If gain, also enter in Part 1, line 8, | | | iu (0). | | ال | | | | | |
| If (loss), enter -0- in Part I, line 8 | - | | | | Ŋ | 3 | | | N/A | |
| Part Va Qualification U | Inder S | ection 4940(e) for | Reduced | Tax on Net | Inv | estn | nent Inc | ome | | |
| If section 4940(d)(2) applies, leave the Was the foundation liable for the sect If "Yes," the foundation doesn't qualified. Enter the appropriate amount in the section of | tion 4942 fy under se | tax on the distributable amection 4940(e). Do not com | nplete this part | t · | rod? | | | | | Yes X No |
| (a) | T T | ini for each year, see the ii | | fore makino anv e | ntries | | | | | 103 (22) 110 |
| Base periód years Calendar year (or tax year beginnii | ing in) | /h\ | | fore making any e | | • | | | | |
| | | (b) Adjusted qualifying dist | | fore making any e Net value of no | (c) | | use assets | <u> </u> | Distrit | (d) |
| 2017 | ···g ···/ | Adjusted qualifying dist | tributions | Net value of no | (c) nchar | ıtable- | | | Distrit (col. (b) div | (d) oution ratio rided by col. (c)) |
| 2017 | | Adjusted qualifying dis | tributions | Net value of no | (c) nchar | itable- | 3,669 | • | Distrit (col. (b) div | (d) oution ratio rided by col (c)) • 0 4 6 5 4 9 |
| 2016 | | Adjusted qualifying dist | tributions 3,521. 5,312. | Net value of no | (c) nchar 21 | itable- , 34 | 3,669 1,791 | • | Distrit (col. (b) div | (d) Sultion ratio rided by col (c)) . 0 4 6 5 4 9 . 0 4 4 1 3 8 |
| 2016 2015 | | Adjusted qualifying disi 99 81 67 | tributions 3,521. 5,312. 7,160. | Net value of no | (c) nchar 21 18 | table- , 34 , 47 | 3,669 1,791 5,155 | • | Distrit (col. (b) div | (d) pution ratio rided by col (c)) |
| 2016 | | Adjusted qualifying disi 99 81 67 57 | tributions 3,521. 5,312. 7,160. 6,725. | Net value of no | (c) nchar 21 18 18 | table- , 34 , 47 , 65 | 3,669 1,791 5,155 4,224 | • | Distrit (col. (b) div | (d) Dution ratio Inded by col (c)) I 0 4 6 5 4 9 I 0 4 4 1 3 8 I 0 3 6 2 9 9 I 0 3 1 1 5 0 |
| 2016 2015 2014 | | Adjusted qualifying disi 99 81 67 57 | tributions 3,521. 5,312. 7,160. | Net value of no | (c) nchar 21 18 18 | table- , 34 , 47 , 65 | 3,669 1,791 5,155 | • | Distrit (col. (b) div | (d) Dution ratio Inded by col (c)) I 0 4 6 5 4 9 I 0 4 4 1 3 8 I 0 3 6 2 9 9 I 0 3 1 1 5 0 |
| 2016 2015 2014 2013 | | Adjusted qualifying disi 99 81 67 57 | tributions 3,521. 5,312. 7,160. 6,725. | Net value of no | (c) nchar 21 18 18 | table- , 34 , 47 , 65 | 3,669 1,791 5,155 4,224 | • | Distrit (col. (b) div | (d) Sultion ratio Fided by col (c)) . 0 4 6 5 4 9 . 0 4 4 1 3 8 . 0 3 6 2 9 9 . 0 3 1 1 5 0 . 0 3 6 9 6 2 |
| 2016 2015 2014 | | Adjusted qualifying disi 99 81 67 57 54 | 3,521. 5,312. 7,160. 6,725. 0,474. | Net value of no | (c) nchar 21 18 18 18 | , 34 , 47 , 65 , 51 | 3,669 1,791 5,155 4,224 | • | Distrit (col. (b) div | (d) Sultion ratio Fided by col (c)) . 0 4 6 5 4 9 . 0 4 4 1 3 8 . 0 3 6 2 9 9 . 0 3 1 1 5 0 . 0 3 6 9 6 2 |
| 2016 2015 2014 2013 2 Total of line 1, column (d) | 5-year bas | Adjusted qualifying disi 99 81 67 57 54 se period - divide the total of | 3,521. 5,312. 7,160. 6,725. 0,474. | Net value of no | (c) nchar 21 18 18 18 | , 34 , 47 , 65 , 51 | 3,669 1,791 5,155 4,224 | • | Distrit (col. (b) div | (d) Sultion ratio Inded by col (c)) . 046549 . 044138 . 036299 . 031150 . 036962 |
| 2016 2015 2014 2013 2 Total of line 1, column (d) 3 Average distribution ratio for the | 5-year bas | Adjusted qualifying disi 99 81 67 57 54 se period - divide the total of | 3,521. 5,312. 7,160. 6,725. 0,474. | Net value of no | (c) nchar 21 18 18 18 | , 34 , 47 , 65 , 51 | 3,669 1,791 5,155 4,224 | 2 | Distrib (col. (b) div | (d) Sultion ratio Inded by col (c)) . 046549 . 044138 . 036299 . 031150 . 036962 |
| 2016 2015 2014 2013 2 Total of line 1, column (d) 3 Average distribution ratio for the state foundation has been in exister | 5-year bas | Adjusted qualifying disi 99 81 67 57 54 se period - divide the total of than 5 years | tributions 3,521. 5,312. 7,160. 6,725. 0,474. on line 2 by 5.4 | Net value of no | (c) nchar 21 18 18 18 | , 34 , 47 , 65 , 51 | 3,669 1,791 5,155 4,224 | 2 | (col. (b) div | (d) Pution ratio rided by col (c)) . 046549 . 044138 . 036299 . 031150 . 036962 . 195098 |
| 2016 2015 2014 2013 2 Total of line 1, column (d) 3 Average distribution ratio for the state foundation has been in exister | 5-year bas | Adjusted qualifying disi 99 81 67 57 54 se period - divide the total of than 5 years | tributions 3,521. 5,312. 7,160. 6,725. 0,474. on line 2 by 5.4 | Net value of no | (c) nchar 21 18 18 18 | , 34 , 47 , 65 , 51 | 3,669 1,791 5,155 4,224 | 2 | (col. (b) div | (d) Pution ratio Inded by col (c)) . 046549 . 044138 . 036299 . 031150 . 036962 . 195098 . 039020 2,725,108. |
| 2016 2015 2014 2013 2 Total of line 1, column (d) 3 Average distribution ratio for the the foundation has been in exister | 5-year bas | Adjusted qualifying disi 99 81 67 57 54 se period - divide the total of than 5 years | tributions 3,521. 5,312. 7,160. 6,725. 0,474. on line 2 by 5.4 | Net value of no | (c) nchar 21 18 18 18 | , 34 , 47 , 65 , 51 | 3,669 1,791 5,155 4,224 | 2 | (col. (b) div | (d) Pution ratio Inded by col (c)) . 046549 . 044138 . 036299 . 031150 . 036962 . 195098 . 039020 2,725,108. |
| 2016 2015 2014 2013 2 Total of line 1, column (d) 3 Average distribution ratio for the the foundation has been in exister | 5-year bas | Adjusted qualifying disi 99 81 67 57 54 se period - divide the total of than 5 years | tributions 3,521. 5,312. 7,160. 6,725. 0,474. on line 2 by 5.4 | Net value of no | (c) nchar 21 18 18 18 | , 34 , 47 , 65 , 51 | 3,669 1,791 5,155 4,224 | 2 3 | (col. (b) div | (d) pution ratio rided by col (c)) |
| 2016 2015 2014 2013 2 Total of line 1, column (d) 3 Average distribution ratio for the the foundation has been in exister 4 Enter the net value of noncharitab 5 Multiply line 4 by line 3 | 5-year bas ince if less ble-use ass | Adjusted qualifying dist 99 81 67 57 54 se period - divide the total of than 5 years sets for 2018 from Part X, I | tributions 3,521. 5,312. 7,160. 6,725. 0,474. on line 2 by 5.4 | Net value of no | (c) nchar 21 18 18 18 | , 34 , 47 , 65 , 51 | 3,669 1,791 5,155 4,224 | 2 3 | (col. (b) div | (d) pution ratio rided by col (c)) |
| 2016 2015 2014 2013 2 Total of line 1, column (d) 3 Average distribution ratio for the | 5-year bas ince if less ble-use ass | Adjusted qualifying dist 99 81 67 57 54 se period - divide the total of than 5 years sets for 2018 from Part X, I | tributions 3,521. 5,312. 7,160. 6,725. 0,474. on line 2 by 5.4 | Net value of no | (c) nchar 21 18 18 18 | , 34 , 47 , 65 , 51 | 3,669 1,791 5,155 4,224 | 2 3 4 5 | (col. (b) div | (d) Putton ratio rided by col (c)) . 046549 . 044138 . 036299 . 031150 . 036962 . 195098 . 039020 2,725,108. 886,734. 18,054. |
| 2016 2015 2014 2013 2 Total of line 1, column (d) 3 Average distribution ratio for the the foundation has been in exister 4 Enter the net value of noncharitab 5 Multiply line 4 by line 3 | 5-year bas ince if less ble-use ass | Adjusted qualifying dist 99 81 67 57 54 se period - divide the total of than 5 years sets for 2018 from Part X, I | tributions 3,521. 5,312. 7,160. 6,725. 0,474. on line 2 by 5.4 | Net value of no | (c) nchar 21 18 18 18 | , 34 , 47 , 65 , 51 | 3,669 1,791 5,155 4,224 | 2 3 4 5 | (col. (b) div | (d) |
| 2016 2015 2014 2013 2 Total of line 1, column (d) 3 Average distribution ratio for the street foundation has been in exister 4 Enter the net value of noncharitab 5 Multiply line 4 by line 3 6 Enter 1% of net investment incom | 5-year bas ince if less ple-use ass | Adjusted qualifying dist 99 81 67 57 54 se period - divide the total of than 5 years sets for 2018 from Part X, I | tributions 3,521. 5,312. 7,160. 6,725. 0,474. on line 2 by 5.4 | Net value of no | (c) nchar 21 18 18 18 | , 34 , 47 , 65 , 51 | 3,669 1,791 5,155 4,224 | 2 3 4 5 6 | (col. (b) div | (d) pution ratio rided by col (c)) |

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THE JULIAN A. AND LOIS G.

BRODSKY FOUNDATION 23-2785280 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 and onter "N/A" on line 1 (attach copy of letter if necessary-see instructions) Date of ruling or determination letter: 18,054 b Domestic foundations that meet the section 4040(c) requirements in Part V, check here X and enter 1% c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, onter 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 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 18,054 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-6 Credits/Payments. 11,738 a 2018 estimated tax payments and 2017 overpayment credited to 2018 0. b Exempt foreign organizations - tax withheld at source 6b 0 c Tax paid with application for extension of time to file (Form 8868) 6c 0. d Backup withholding erroneously withheld 44,738 7 Total credits and payments Add lines 6a through 6d 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 26,684. 10 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 26,684. Refunded 11 Enter the amount of line 10 to be: Credited to 2019 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? X b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition 1b Х 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. c Did the foundation file Form 1120-POL for this year? 1c d Enter the amount (if any) of tax on political exponditures (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 exponditure tax imposed on foundation managers. ► \$ X 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? N/A 4b b if "Yes," has it filed a tax return on Form 990-T for this year? 5 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T 6 Arc the requirements of section 508(e) (relating to sections 4041 through 4045) satisfied either: By language in the governing instrument, or By state legislation that offectively amends the governing instrument so that no mandatory directions that conflict with the state law. X remain in the governing instrument? 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 8a Enter the states to which the foundation reports or with which it is registered. See instructions. PA b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation 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 calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10

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Form 990-PF (2018)

| 11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of sections 12(b) (13) P1 P142, attach schedule. See instructions 1 D of the foundation make a dictribution to a doner advised fund over which the foundation or a dequalified person had advisery privileges? 1 P142, attach statement, See instructions 1 D off the foundation comply with the public inspection requirements for its annual returns and exemption application? Whoste address: N/A 1 The blooks are navire of N/A 2 The blooks are navire of N/A 3 The blooks are n | | Statements Regarding Activities (continued) | | | |
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| If Yes, a table hatements See instructions Iz X X Website address N/A Nebute address N/A The books are in care of BOARD OF DIRECTORS Telephone No (215) 655 - 170 The Control of Section 4947(a)(1) nonexempt characteristic string from 990 Pri inley of Form 141 - Check here and enter the amount of tax-exempt interest received on accrete during the year 15 N/A 15 No No No No No No No N | | section 512(b)(13)? If "Yes," attach schedule. See instructions | 11 | | X |
| 13 Did the foundation comply with the public respection requirements for its annual returns and exemption application? 13 X Webste address N/A | 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? | | : | |
| Whosts address ► N/A The books are in care of ► BOARD OF DIRECTORS Located at ► 1701 JOHN F. KENNEDY BLVD., 52ND FL., PHILA., PA 21P-4 ► 19103 15 Section 4947(a)(1) nonexempt characteristic trusts fining form 990-PF in less of Form 1041 - check here and enter the amount of tax-exempt interest received or accreed furning they year 16. Alary time during calendar year 2016, dot 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 foundation for the securities, or other financial account in a foreign country? PART VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is chacked 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 otherwise extend credit to (or accept them 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) Transfer any income or assets to a disqualified person or less of the foundation agreed to make a girant to or to employ the official for a period after termination of government sequalified person or less than the foundation engage in a prior year in any of the acts fal to qualify under the exceptions described in Regulations section 53.94 (1)(1) or an accurrent, other termination of government service, it externment years with 190 days.) 1 If any answer is "Yes" to 14(1)-(6), did any of the acts described in Tay, other than excepted acts, that were not corrected before the list did of the law exercity of the | | If "Yes," attach statement. See instructions | 12 | | X |
| 14. The books are in care of ▶ BOARD OF DIRECTORS Located at ▶ 1701 JOHN F. KENNEDY BLVD., 52ND FL., PHILA. PA 21P-4 ▶ 19103 15. Section 497(a)() nonecempt charitable trusts thing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year 6. At any time during clainedry sery 2016, do 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 regularements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶ Paid: VIFE 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 bases) of property with a disqualified person? (2) Biorrow money fron, lend money to, or otherwise extend credit to (or accept it from) a disqualided person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to 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? (6) Agree to be ay money or property to a government official? (Exception, Check 'No' if the foundation engage in a goor year in any of the acts fat to qualify under the exceptions described in Regulations section 53 4941(0)-3 or in a currient notice regarding dissets assistance? See instructions 2) Agree to b | 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | 13 | Х | |
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| 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 390-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year 16. All any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and fining requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country. See the instructions for exceptions and fining requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country. Part VIII-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): (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) Furnish quods, 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 assess to 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 boundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) If yes yes a lid year is yes to 14 (1)-6, did any of the acts falls to quality under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance? See instructions If yes in the exception of the tax year beginning in 2018 or in a current produce regarding disaster assistance? See instructions If yes in the | | Located at ▶ 1701 JOHN F. KENNEDY BLVD., 52ND FL., PHILA., PA ZIP+4 ▶19 | 103 | | |
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| had not been removed from jeopardy before the first day of the tax year beginning in 2018? | | | \$\$\$\$\frac{1}{2}\$\f | F. 10 F. 13 | |
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Form 990-PF (2018)

BRODSKY FOUNDATION

| Part VII-B | Statements Regarding Activities for Which | Form 4720 May Be F | Required (continu | 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))? | Ye | es 🗶 No | , | | , |
| (2) Influer | nce the outcome of any specific public election (see section 4955); o | or to carry on, directly or indire | | | | 1 | |
| any vo | ter registration drive? | , | | es X No | | 1 | |
| (3) Provid | e a grant to an individual for travel, study, or other similar purposes | ? | Ye | es X No | | - | ; |
| (4) Provid | e a grant to an organization other than a charitable, etc., organizatio | n described in section | | | | | 1 |
| 4945(| d)(4)(A)? See instructions | | Ye | s X No | | | |
| (5) Provid | e for any purpose other than religious, charitable, scientific, literary, | or educational purposes, or f | | | | 1 | |
| • | evention of cruelty to children or animals? | | | es X No | | | 1 |
| | er is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un | | in Regulations | | | | |
| section 53. | 4945 or in a current notice regarding disaster assistance? See instr | uctions | | N/A | 5b | <u> </u> | |
| • | ins relying on a current notice regarding disaster assistance, check | | | | | | |
| c If the answ | er is "Yes" to question 5a(4), does the foundation claim exemption f | | | | | | |
| expenditur | e responsibility for the grant? | N | I/A | es L 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? | | Ye | s X No | | | |
| | ndation, during the year, pay premiums, directly or indirectly, on a p | personal benefit contract? | | | 6b | | Х |
| | 6b, file Form 8870. | | — | (TE) | | | |
| - | during the tax year, was the foundation a party to a prohibited tax s | | Ye | s X No | | <u> </u> | |
| • | the foundation receive any proceeds or have any net income attribi | | | N/A | 7b | ļ | |
| | dation subject to the section 4960 tax on payment(s) of more than \$ | 61,000,000 in remuneration of | | ₩ | | ĺ | |
| | achute payment(s) during the year? | F | | es X No | L | l | |
| Part VIII | Information About Officers, Directors, Trust Paid Employees, and Contractors | ees, Foundation Ma | inagers, Higniy | / | | | |
| 1 List all offic | cers, directors, trustees, and foundation managers and t | heir compensation. | | | | | |
| | | | (c) Compensation | (d) Contributions to | 1 | (e) Exp | ense |
| | (a) Name and address | (b) Title, and average hours per week devoted to position | (If not paid, enter -0-) | (d) Contributions to employee benefit plan and deferred | ıs a | (e) Exp ccount allowa | , other nces |
| | | to position | Circi o j | compensation | + | 4.10114 | |
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| SEE STA | FEMENT 10 | 1 | 75,000. | 0 | | | 0. |
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| | | | | | | | |
| 2 Compensa | tion of five highest-paid employees (other than those inc | | enter "NONE." | | | | |
| (a) Nar | ne and address of each employee paid more than \$50,000 | (b) Title, and average hours per week | (c) Compensation | (d) Contributions to employee benefit plan and deferred | s a | (e) Exp ccount | ense other |
| (4) 1141 | | devoted to position | (c) compensus | compensation_ | | allowa | nces |
| N | ONE | | | | | | |
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| Cotal number o | f other employees paid over \$50,000 | | | • | Ī | | 0 |

| Form 990-PF (2018) BRODSKY FOUNDATION | 23-2 | 2785280 Page 7 |
|--|--|--------------------|
| Part VIII Information About Officers, Directors, Trustees, Foundary Paid Employees, and Contractors (continued) | | |
| 3 Five highest-paid independent contractors for professional services. If none, enter | r "NONE." | |
| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
| NONE | | |
| | | |
| | | |
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| | | |
| = 1.1 | | ▶ 0 |
| Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities | | |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statis number of organizations and other beneficiaries served, conferences convened, research papers pro | stical information such as the duced, etc. | Expenses |
| 1 N/A | | |
| | | <u> </u> |
| 2 | | |
| 3 | | |
| | | |
| 4 | | |
| | | |
| Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on | lines 1 and 2. | Amount |
| 1 N/A | | |
| | | |
| 2 | | |
| All other program-related investments. See instructions. | | |
| 3 | | |
| | | |
| | | |
| Total. Add lines 1 through 3 | > | 0. |
| | | Form 990-PF (2018) |

Form 990-PF (2018)

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: 21,710,227. a Average monthly fair market value of securities 1a 649,311. 1b b Average of monthly cash balances 711,638. 1c c Fair market value of all other assets 071,176. 1d d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) 1e 2 Acquisition indebtedness applicable to line 1 assets 23,071,176. 3 Subtract line 2 from line 1d 346,068. Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 5 22,725,108. Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 1,136,255. Minimum investment return. Enter 5% of line 5 Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here
and do not complete this part.) 1,136,255. Minimum investment return from Part X, line 6 18,054 2a Tax on investment income for 2018 from Part VI, line 5 2a 2b b Income tax for 2018. (This does not include the tax from Part VI.) 18.054. 2c c Add lines 2a and 2b 1,118,201. 3 Distributable amount before adjustments. Subtract line 2c from line 1 4 Recoveries of amounts treated as qualifying distributions 1,118,201 5 5 Add lines 3 and 4 6 Deduction from distributable amount (see instructions) 1,118,201. Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes 1,151,250. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a 1b b Program-related investments - total from Part IX-B 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) 3b b Cash distribution test (attach the required schedule) 1,151,250. Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment 18,054. income. Enter 1% of Part I, line 27b 5 1,133,196. 6 Adjusted qualifying distributions. Subtract line 5 from line 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

Form **990-PF** (2018)

4940(e) reduction of tax in those years.

THE JULIAN A. AND LOIS G.

23-2785280 Form 990-PF (2018) BRODSKY FOUNDATION Page 9 Part XIII Undistributed Income (see instructions) (d) (b) (c) Corpus Years prior to 2017 2017 2018 1 Distributable amount for 2018 from Part XI. 1,118,201. line 7 2 Undistributed income, if any, as of the end of 2018 930,037. a Enter amount for 2017 only b Total for prior years: 0. 3 Excess distributions carryover, if any, to 2018: a From 2013 **b** From 2014 c From 2015 dFrom 2016 eFrom 2017 0. f Total of lines 3a through e 4 Qualifying distributions for 2018 from Part XII, line 4: \triangleright \$ 1,151,250. 930,037 a Applied to 2017, but not more than line 2a b Applied to undistributed income of prior 0. years (Election required - see instructions) c Treated as distributions out of corpus 0. (Election required - see instructions) 221,213. d Applied to 2018 distributable amount 0. e Remaining amount distributed out of corpus 0. 0. Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a)) 6 Enter the net total of each column as indicated below: 0 a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract 0. 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 0. assessed d Subtract line 6c from line 6b. Taxable 0. amount - see instructions e Undistributed income for 2017. Subtract line 0. 4a from line 2a. Taxable amount - see instr f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must 896,988. be distributed in 2019 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election 0. may be required - see instructions) 8 Excess distributions carryover from 2013 0. not applied on line 5 or line 7 9 Excess distributions carryover to 2019. 0. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2014 b Excess from 2015 c Excess from 2016

dExcess from 2017 e Excess from 2018

THE JULIAN A. AND LOIS G. 23-2785280 BRODSKY FOUNDATION 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 2018, enter the date of the ruling 4942(j)(5) 4942(j)(3) or b Check box to indicate whether the foundation is a private operating foundation described in section Prior 3 years 2 a Enter the lesser of the adjusted net Tax year (d) 2015 (b) 2017 (c) 2016 (e) Total (a) 2018 income from Part I or the minimum investment return from Part X for each year listed **b** 85% of line 2a c Qualifying distributions from Part XII, line 4 for each year listed d Amounts included in line 2c not used directly for active conduct of exempt activities e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c 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 (4) Gross investment income Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets Part XV 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).) SEE STATEMENT 11 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 X 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: SEE STATEMENT 12 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 (2018) BRODSKY FOUNDATION
Part XV Supplementary Information (continued)

23-2785280 Page 11

| Recipient If recipient is an individual show any relationship to any foundation status of recipient Purpose of grant or substantial contributor To Help Fund The Operating Budgets To Help Fund The Operating Budgets The Various To Help Fund The Operating Budgets The Various To Help Fund The Operating Budgets The Various See Attached Statement None 501(c)(3) Charitable Organizations. | Amount |
|---|--------------|
| TO HELP FUND THE OPERATING BUDGETS OF THE VARIOUS 501(C)(3) SEE ATTACHED STATEMENT NONE 501(C)(3) CHARITABLE | Amount |
| a Paid during the year TO HELP FUND THE OPERATING BUDGETS OF THE VARIOUS 501(C)(3) SEE ATTACHED STATEMENT NONE 501(C)(3) CHARITABLE | |
| OPERATING BUDGETS OF THE VARIOUS 501(C)(3) SEE ATTACHED STATEMENT NONE 501(C)(3) CHARITABLE | |
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| Unrelated b | usiness income | | by section 512, 513, or 514 | (e) |
| (a) | (b) | (C) Exclu- | (d) | Related or exempt |
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| to the Accom | plishment of | Exempt F | Purposes | |
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| | | | ed importantly to the accomp | disnment of |
| i by providing funds | for such purposes). | • | | |
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| | to the Accom | to the Accomplishment of | Business Code Amount Exclusion Code 1 14 18 18 | (a) Business Amount Exempt Purposes (b) Exclusion Code Amount (d) Amount 14 516,065. 18 1,340,525. |

| Form 990-PF Part XVI | • | KY FOUNDATION | to and Transactions ar | | 3-2785280 | |
|-------------------------|---|---|---|-------------------------------------|------------------------------------|--------------|
| · dic /coi | Exempt Organ | | o and Transactions at | d Heladonships With | Hononantable | |
| | - • | | lowing with any other organization | described in section 501(c) | | Yes |
| • | | • | lating to political organizations? | | | |
| a Transfer (1) Cas | | ation to a noncharitable exem | pt organization of: | | 1a(1) | |
| . , | er assets | | | | 1a(1) | <u> </u> |
| b Other tra | | | | | | |
| (1) Sale | es of assets to a noncharita | ble exempt organization | | | 1b(1) | |
| | | ncharitable exempt organizati | on | | 1b(2) | <u> </u> |
| ` ' | ital of facilities, equipment, | | | | 1b(3) 1b(4) | |
| • • | mbursement arrangements Ins or loan guarantees | | | | 1b(5) | |
| | - | embership or fundraising solic | itations | | 1b(6) | |
| | | uling lists, other assets, or pai | | | 1c | |
| d If the an | swer to any of the above is | "Yes," complete the following | schedule. Column (b) should alw | ays show the fair market value of | the goods, other ass | ets, |
| | | | eceived less than fair market value | in any transaction or sharing arr | angement, show in | |
| (a)Line no | (a) the value of the goods, (b) Amount involved | other assets, or services rece | itable exempt organization | (d) Description of transfers, tran | reactions, and sharing ar | rangem |
| (a)cine no | (b) Amount involved | N/ | | (u) Description of transfers, trans | sactions, and sharing a | angeni |
| | | *17 | ** | | | |
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| 2a Is the fo | undation directly or indirec | tly affiliated with, or related to | , one or more tax-exempt organiza | ations described | | |
| | * * * | n 501(c)(3)) or in section 527 | ?? | | Yes | |
| b If "Yes," | complete the following sch | | (h) Tuna of accompation | (a) Departmen | of relationable | |
| | (a) Name of org N/A | janization | (b) Type of organization | (c) Description | of relationship | |
| | 14,721 | | | **** | | |
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| | | | cluding accompanying schedules and s er than taxpayer) is based on all informa | | dge May the IRS of return with the | e prepa |
| Here | (/10) | 1-201 | 14/6/19 | CHAIR | shown below X Yes | ? See 1 |
| | gnature of officer or trustee | 1000 | Date / | Title | res | |
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Schedule B

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

Department of the Treasury Internal Revenue Service

Name of the organization

Schedule of Contributors

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

OMB No 1545-0047

2018

Employer identification number

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

THE JULIAN A. AND LOIS G. BRODSKY FOUNDATION 23-2785280 Organization type (check one) Filers of: Section: J 501(c)(Form 990 or 990-EZ) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization X 501(c)(3) exempt private foundation Form 990-PF 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions **General Rule** For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributors **Special Rules** For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III 🔟 For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose Don't complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

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

Name of organization
THE JULIAN A. AND LOIS G.
BRODSKY FOUNDATION

Employer identification number

23-2785280

| Part I | Contributors (see instructions) Use duplicate copies of Part I if additional | al space is needed | |
|------------|--|----------------------------|---|
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 1 | JULIAN AND LOIS BRODSKY 1004 SWALLOW DRIVE CHERRY HILL, NJ 08003 | \$1,558,200. | Person X Payroll |
| (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 Noncash (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 Noncash (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 JULIAN A. AND LOIS G.
BRODSKY FOUNDATION

Employer identification number

23-2785280

| Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed | | | | | | |
|---|--|--|----------------------|--|--|--|
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions) | (d) Date received | | | |
| 1 | 40,000 SHARES OF COMCAST CORP. STOCK | *** | | | | |
| | | \$1,558,200. | 12/03/18 | | | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions) | (d) Date received | | | |
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| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions) | (d) Date received | | | |
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| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions) | (d) Date received | | | |
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Name of organization

THE JULIAN A. AND LOIS G.

Employer identification number

| BRODS | KY FOUNDATION | | | 23-2785280 | | | | | |
|---------------------------|--|---|--|--|--|--|--|--|--|
| Part III | Exclusively religious, charitable, etc., contrib from any one contributor. Complete columns | utions to organizations described in | section 501(c)(7), (8), o | or (10) that total more than \$1,000 for the yea | | | | | |
| | completing Part III, enter the total of exclusively religiou | s, charitable, etc., contributions of \$1,000 o | r less for the year (Enter this | info once) > \$ | | | | | |
| 7.33. | Use duplicate copies of Part III if addition | al space is needed | — т | | | | | | |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) | Description of how gift is held | | | | | |
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| | | (e) Transfer of g | ft | | | | | | |
| | Transferee's name, address, | and ZIP + 4 | Relationship | of transferor to transferee | | | | | |
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| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) | Description of how gift is held | | | | | |
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| | (e) Transfer of gift | | | | | | | | |
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| | Transferee's name, address, | and ZIP + 4 | Relationship of transferor to transferee | | | | | | |
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| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) | Description of how gift is held | | | | | |
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| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) | Description of how gift is held | | | | | |
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| |] | | | | | | | | |

N/A

Part IV | Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (d) Date sold (a) List and describe the kind(s) of property sold, e.g., real estate, (c) Date acquired 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) (mo, day, yr.) 12/31/18 1a MERRILL LYNCH #4000 -SEE ATTACHED P VARIOUS b MERRILL LYNCH #4000 - SEE ATTACHED 12/31/18 P VARIOUS 12/31/18 c JP MORGAN #0003 - SEE ATTACHED P VARIOUS MORGAN #0003 -SEE ATTACHED P VARIOUS 12/31/18 d JP 12/31/18 MORGAN #5004 -SEE ATTACHED P VARIOUS e JP MORGAN #5004 -P 12/31/18 SEE ATTACHED VARIOUS f JP gJP 12/31/18 MORGAN #5004 -SEE ATTACHED P VARIOUS h BROWN BROTHERS HARRIMAN #7891 -SEE ATTACHED P VARIOUS 12/31/18 BROWN BROTHERS HARRIMAN #7891 SEE ATTACHED P VARIOUS 12/31/18 | BBH ALTAROCK SEE ATTACHED P VARIOUS 12/31/18 k BBH ALTAROCK -SEE ATTACHED P VARIOUS 12/31/18 P VARIOUS 12/31/18 | BBH BARES - SEE ATTACHED m BBH BARES SEE ATTACHED P VARIOUS 12/31/18 n CAPITAL GAINS DIVIDENDS 0 (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price (e) plus (f) minus (g) (or allowable) plus expense of sale 145,440. 112,745. 258,185 a 957,938. <34,281.> 967,946 10,008. b 259,208 293,489. C 565,914. 552,956. 12,958. d < 8, 177.>1,029,435. 1,037,612. е 1,771,133. 1,611,933. 159,200. f 8.836. 82,050. 73,214. g <14,719.> 53,414. 68,133. h 167,096. 123,247. 43,849. 1,536. <1,536.> 8,835. 8,835. ī 602. 602. 28,666. 28,666. m 65,609. 65,609. n 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 but not less than "-0-") over col (j), if any as of 12/31/69 112,745. а 957.938. b <34,281.> 12,958. <8,177.> е 159,200. 8,836. g $\overline{<14.719.}>$ h 43,849. <1,536.> 8,835. k 602. -28,666. m 65,609. n 0 { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } 1,340,525. Capital gain net income or (net capital loss) 2 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c).

If (loss), enter "-0-" in Part I, line 8

| FORM 990-PF | DIVIDENDS | S AND INT | EREST | FROM SECUF | RITIES S' | PATEMENT | 1 |
|---|---|-----------------------------|------------------------------|---|-----------------------------------|----------------------------|-------|
| SOURCE | GROSS AMOUNT | CAPIT. GAIN: DIVIDE: | 3 | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTE NET INCO | |
| BBH ALTAROCK K-1 BBH BARES K-1 BROWN BROTHERS | 1,410, 2,162. | • | 0. | 1,410. 2,162. | 2,162. | , | |
| HARRIMAN JP MORGAN #10003 JP MORGAN #75004 MERRILL LYNCH | 55,749. 163,965. 220,096. 138,292. | 37, 13, | 986. 987. 551. 385. | 42,763. 126,878. 206,445. 136,407. | 126,878. 206,445. | | |
| TO PART I, LINE 4 | 581,674. | 65, | 509. | 516,065. | 516,065. | | |
| FORM 990-PF | | LEG | AL FE | ES | S | FATEMENT | 2 |
| DESCRIPTION | | (A) EXPENSES PER BOOK | | (B) T INVEST- NT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITAE PURPOSE | |
| LEGAL AND PROFESSION | NAL FEES | 6,50 | | 0. | | | 0. |
| TO FM 990-PF, PG 1, | LN 16A | 6,50 | | 0. | | | 0. |
| FORM 990-PF | | ACCOUN' | ring | FEES | S | PATEMENT | 3 |
| DESCRIPTION | | (A) EXPENSES PER BOOK | | (B) T INVEST- NT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITAE PURPOSE | |
| ACCOUNTING FEES | _ | 6,47 | 7. | 0. | | | 0. |
| TO FORM 990-PF, PG | 1, LN 16B | 6,47 | 7. | 0. | - | | 0. |

| FORM 990-PF C | THER PROFES | SIONAL FEES | STATEMENT 4 | | | |
|---|------------------------------|-----------------------------------|-------------------------------|-------------------------------|--|--|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | | (D) CHARITABLE PURPOSES | | |
| INVESTMENT MANAGEMENT FEES | 39,587. | 39,587. | | 0. | | |
| TO FORM 990-PF, PG 1, LN 16C | 39,587. | 39,587. | | 0. | | |
| FORM 990-PF | TAX | ES | S | ratement 5 | | |
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | | | | |
| FOREIGN TAXES 2018 FEDERAL ESTIMATED TAXES | 6,207. | | | 0. | | |
| TO FORM 990-PF, PG 1, LN 18 | 36,207. | 6,207. | | 0. | | |
| FORM 990-PF | OTHER E | XPENSES | S | ratement 6 | | |
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | | |
| BBH ALTAROCK - PORTFOLIO (2% FLOOR) BBH BARES - PORTFOLIO (2% | 3,440. | 3,440. | | 0. | | |
| FLOOR) | 1,960. | 1,960. | | 0. | | |
| TO FORM 990-PF, PG 1, LN 23 | 5,400. | 5,400. | | 0. | | |

| FORM 990-PF OTHER DECREASES IN NET | ASSETS OR F | UND BALANCES | STATEMENT ' | 7 — |
|---|--|--|----------------------|-------------|
| DESCRIPTION | | | AMOUNT | |
| UNREALIZED GAIN ON STOCK CONTRIBUTED TO DIVIDEND TIMING ADJUSTMENT SCHEDULE K-1 TIMING ADJUSTMENT | 1,558,113 4,854 34,705 | | | |
| TOTAL TO FORM 990-PF, PART III, LINE 5 | | | 1,597,672 | - - |
| FORM 990-PF CORPOR | ATE STOCK | | STATEMENT 8 | = 8 - |
| DESCRIPTION | | BOOK VALUE | FAIR MARKET VALUE | |
| MERRILL LYNCH PORTFOLIO EQUITIES JP MORGAN 5004- VARIOUS PORTFOLIO EQUI JP MORGAN 1003- VARIOUS PORTFOLIO EQUI BBH - VARIOUS PORTFOLIO EQUITIES | 1,233,389. 7,715,941. 2,615,279. 2,092,719. | 4,060,080. 7,999,598. 6,576,831. 2,176,949. | | |
| TOTAL TO FORM 990-PF, PART II, LINE 10 | B : | 13,657,328. | 20,813,458 | - - |
| FORM 990-PF OTHER I | NVESTMENTS | | STATEMENT S | = 9 - |
| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE | |
| BBH ALTAROCK K-1 BBH BARES K-1 | COST COST | 267,552. 274,308. | 349,615 343,122 | |
| TOTAL TO FORM 990-PF, PART II, LINE 13 | | 541,860. | 692,737 | • |

| | LIST OF OFFICERS, DIRECTORS STATEMENT 1 AND FOUNDATION MANAGERS | | | | |
|--|---|---------|---------------------------------|---------------------------------------|--|
| NAME AND ADDRESS | TITLE AND AVRG HRS/WK | | EMPLOYEE BEN PLAN CONTRIB | | |
| JULIAN A. BRODSKY | DIRECTOR | | | · · · · · · · · · · · · · · · · · · · | |
| C/O 1701 JOHN F. KENNEDY BLVD, 52ND FLOOR PHILADELPHIA, PA 19103 | 1.00 | 0. | 0. | 0. | |
| LOIS G. BRODSKY | DIRECTOR | | | | |
| C/O 1701 JOHN F. KENNEDY BLVD, 52ND FLOOR PHILADELPHIA, PA 19103 | 1.00 | 0. | 0. | 0. | |
| DEBRA G. BRODSKY 205 OAK AVENUE HADDONFIELD, NJ 08033 | DIRECTOR 1.00 | 25,000. | 0. | 0 . | |
| ELLEN G. BRODSKY 34 SHERMAN STREET CAMBRIDGE, MA 02138 | DIRECTOR 1.00 | 25,000. | 0. | 0 . | |
| LAURA G. BRODSKY 223 BELAIRE TERRACE MT LAUREL, NJ 08054 | DIRECTOR 1.00 | 25,000. | 0. | 0 . | |
| TOTALS INCLUDED ON 990-PF, PAGE 6 | 5, PART VIII | 75,000. | 0. | 0 | |
| | T XV - LINE 1A FOUNDATION MANAGE | ers | STATE | EMENT 11 | |

NAME OF MANAGER

JULIAN A. BRODSKY LOIS G. BRODSKY FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 12

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JULIAN A. BRODSKY 1701 JOHN F. KENNEDY BLVD., 52ND FL PHILADELPHIA, PA 19103

)

FORM AND CONTENT OF APPLICATIONS

ORGANIZATIONS SEEKING CONTRIBUTIONS SHOULD SUBMIT A REQUEST STATING PURPOSE FOR REQUEST.

ANY SUBMISSION DEADLINES

RESTRICTIONS AND LIMITATIONS ON AWARDS