

Form **990-PF**

**Return of Private Foundation**

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

OMB No 1545-0052

**2018**

Department of the Treasury  
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

Open to Public Inspection

For calendar year 2018 or tax year beginning , and ending

Name of foundation: **W.H. GREENE FOUNDATION**

Number and street (or P O box number if mail is not delivered to street address): **400 QUAKER ROAD**

Room/suite: \_\_\_\_\_

City or town, state or province, country, and ZIP or foreign postal code: **EAST AURORA, NY 14052**

A Employer identification number: **33-1049504**

B Telephone number: **716-805-1090**

C If exemption application is pending, check here

D 1 Foreign organizations, check here   
2. Foreign organizations meeting the 85% test, check here and attach computation

E If private foundation status was terminated under section 507(b)(1)(A), check here

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

G Check all that apply:  Initial return  Initial return of a former public charity  
 Final return  Amended return  
 Address change  Name change

H Check type of organization:  Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundation **04**

I Fair market value of all assets at end of year (from Part II, col. (c), line 16): **\$ 4,997,702.** (Part I, column (d) must be on cash basis.)

J Accounting method:  Cash  Accrual  
 Other (specify) \_\_\_\_\_

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	955,831.		N/A	
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	3,982.	3,982.		STATEMENT 1
	4 Dividends and interest from securities	32,391.	32,391.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	40.			
	b Gross sales price for all assets on line 6a	40.			
	7 Capital gain net income (from Part IV, line 2)		40.		
	8 Net short-term capital gain				
	9 Income modification				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11	992,244.	36,413.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees				
	c Other professional fees				
	17 Interest				
	18 Taxes <b>STMT 3</b>	367.	367.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
23 Other expenses <b>STMT 4</b>	20,704.	15,050.		1,250.	
24 Total operating and administrative expenses. Add lines 13 through 23	21,071.	15,417.		1,250.	
25 Contributions, gifts, grants paid	210,528.			210,528.	
26 Total expenses and disbursements. Add lines 24 and 25	231,599.	15,417.		211,778.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	760,645.				
b Net investment income (if negative, enter -0-)		20,996.			
c Adjusted net income (if negative, enter -0-)			N/A		

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	1,447,867.	1,186,664.	1,186,664.
	2 Savings and temporary cash investments	1,107,984.	1,111,185.	1,111,185.
	3 Accounts receivable			
	Less: allowance for doubtful accounts			
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 5	1,510,738.	2,527,284.	2,699,853.
	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)	4,066,589.	4,825,133.	4,997,702.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	1,398,175.	1,398,175.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds	2,668,414.	3,426,958.		
30 Total net assets or fund balances	4,066,589.	4,825,133.		
31 Total liabilities and net assets/fund balances	4,066,589.	4,825,133.		

Part III Analysis of Changes in Net Assets or Fund Balances	
1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1 4,066,589.
2 Enter amount from Part I, line 27a	2 760,645.
3 Other increases not included in line 2 (itemize)	3 0.
4 Add lines 1, 2, and 3	4 4,827,234.
5 Decreases not included in line 2 (itemize) <b>TIMING DIFFERENCE</b>	5 2,101.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6 4,825,133.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a CAPITAL GAINS DIVIDENDS</b>			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a <b>40.</b>			<b>40.</b>
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			<b>40.</b>
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	<b>40.</b>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	<b>N/A</b>

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
 If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	<b>189,171.</b>	<b>3,303,938.</b>	<b>.057256</b>
2016	<b>141,410.</b>	<b>2,290,517.</b>	<b>.061737</b>
2015	<b>110,571.</b>	<b>1,901,863.</b>	<b>.058138</b>
2014	<b>88,904.</b>	<b>1,704,173.</b>	<b>.052168</b>
2013	<b>123,328.</b>	<b>1,397,993.</b>	<b>.088218</b>

2 Total of line 1, column (d)	2	<b>.317517</b>
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	<b>.063503</b>
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	<b>4,235,710.</b>
5 Multiply line 4 by line 3	5	<b>268,980.</b>
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	<b>210.</b>
7 Add lines 5 and 6	7	<b>269,190.</b>
8 Enter qualifying distributions from Part XII, line 4	8	<b>211,778.</b>

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	420.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0.
3	Add lines 1 and 2	3	420.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0.
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	5	420.
6	Credits/Payments:		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	692.
b	Exempt foreign organizations - tax withheld at source	6b	0.
c	Tax paid with application for extension of time to file (Form 8868)	6c	0.
d	Backup withholding erroneously withheld	6d	0.
7	Total credits and payments. Add lines 6a through 6d	7	692.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0.
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	272.
11	Enter the amount of line 10 to be: <b>Credited to 2019 estimated tax</b> <input type="checkbox"/> <b>272.</b> <b>Refunded</b> <input type="checkbox"/>	11	0.

**Part VII-A Statements Regarding Activities**

	Yes	No
1a		X
1b		X
1c		X
d		
e		
2		X
3		X
4a		X
4b	N/A	
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10	X	

**Part VII-A Statements Regarding Activities** (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	X	
14 The books are in care of ► <u>TERRENCE G. GREENE</u> Telephone no. ► <u>716-805-1090</u> Located at ► <u>400 QUAKER ROAD, EAST AURORA, NY</u> ZIP+4 ► <u>14052</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	15	N/A
16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here		
	N/A	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____, _____, _____		
b Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)		
	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018.)		
	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b	X

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

		Yes	No
5a During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here	N/A <input type="checkbox"/>	5b	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		6b	X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ...	N/A	7b	
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

**1** List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 7		0.	0.	0.

**2** Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000 0

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services ▶ 0

**Part IX-A** Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
3 All other program-related investments. See instructions.	

Total, Add lines 1 through 3 ▶ 0.

**Part X** Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	2,388,555.
b	Average of monthly cash balances	1b	1,911,658.
c	Fair market value of all other assets	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	4,300,213.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	4,300,213.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	64,503.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,235,710.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	211,786.

**Part XI** Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here  and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	211,786.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	420.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	420.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	211,366.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	211,366.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	211,366.

**Part XII** Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	211,778.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	211,778.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	211,778.

**Note:** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.



**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				211,366.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013	53,948.			
b From 2014	5,130.			
c From 2015	16,018.			
d From 2016	26,884.			
e From 2017	24,157.			
f Total of lines 3a through e	126,137.			
4 Qualifying distributions for 2018 from Part XII, line 4: ▶ \$ 211,778.				
a Applied to 2017, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2018 distributable amount				211,366.
e Remaining amount distributed out of corpus	412.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	126,549.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				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 2013 not applied on line 5 or line 7	53,948.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	72,601.			
10 Analysis of line 9:				
a Excess from 2014	5,130.			
b Excess from 2015	16,018.			
c Excess from 2016	26,884.			
d Excess from 2017	24,157.			
e Excess from 2018	412.			

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

N/A

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

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

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

- 1 **Information Regarding Foundation Managers:**
- a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)
- NONE**
- b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.
- NONE**

- 2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**
- Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d.

- a The name, address, and telephone number or email address of the person to whom applications should be addressed:
- SEE STATEMENT 8**
- 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:

**Part XV** Supplementary Information *(continued)*

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
SEE ATTACHED SCHEDULE	NONE	PUBLIC CHARITY	SEE ATTACHED SCHEDULE	210,528.
<b>Total</b>			<b>▶ 3a</b>	210,528.
<b>b</b> Approved for future payment				
NONE				
<b>Total</b>			<b>▶ 3b</b>	0.





**Schedule B**

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

Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

**2018**

Name of the organization

**W.H. GREENE FOUNDATION**

Employer identification number

**33-1049504**

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

 501(c)( ) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization

Form 990-PF

 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundationCheck 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 contributions.

**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.

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

Name of organization

Employer identification number

**W.H. GREENE FOUNDATION**

**33-1049504**

**Part I Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	W.H. GREENE \$ ASSOCIATES, INC. 400 QUAKER ROAD EAST AURORA, NY 14052	\$ 550,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
2	WILLIAM H. GREENE III 33 ORCHARD TERRACE ORCHARD PARK, NY 14127	\$ 400,000.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

Employer identification number

**W.H. GREENE FOUNDATION**

**33-1049504**

**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
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____



Name of organization <b>W.H. GREENE FOUNDATION</b>	Employer identification number <b>33-1049504</b>
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**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
AXA ADVISORS	781.	781.	
M&T BANK	3,201.	3,201.	
TOTAL TO PART I, LINE 3	3,982.	3,982.	

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
AXA ADVISORS	32,283.	40.	32,243.	32,243.	
CIGNA	148.	0.	148.	148.	
TO PART I, LINE 4	32,431.	40.	32,391.	32,391.	

## FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	367.	367.		0.
TO FORM 990-PF, PG 1, LN 18	367.	367.		0.

## FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	14,050.	14,050.		0.
NEW YORK STATE FILING FEE	250.	0.		250.
NONDEDUCTIBLE CONTRIBUTION	4,404.	0.		0.
ACCOUNTING	2,000.	1,000.		1,000.
TO FORM 990-PF, PG 1, LN 23	20,704.	15,050.		1,250.



FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 7

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
WILLIAM H. GREENE III 33 ORCHARD TERRACE ORCHARD PARK, NY 14127	PRESIDENT & TRUSTEE 3.00		0.	0. 0.
MARY JANE GREENE 33 ORCHARD TERRACE ORCHARD PARK, NY 14127	SECRETARY & TRUSTEE 0.01		0.	0. 0.
TERRENCE G. GREENE 3443 S. CREEK RD. HAMBURG, NY 14075	TREASURER & TRUSTEE 2.00		0.	0. 0.
JENNIFER L. GREENE 15 WINTERHALL DR. ORCHARD PARK, NY 14127	TRUSTEE 1.00		0.	0. 0.
KRISTIE A. GREENE 2311 W MORRISON AVENUE, UNIT 15 TAMPA, FL 33629	TRUSTEE 0.01		0.	0. 0.
CAITLIN E. GREENE 145 CHAUNCEY LANE ORCHARD PARK, NY 14127	TRUSTEE 0.01		0.	0. 0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII			0.	0. 0.

FORM 990-PF

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

STATEMENT 8

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

WILLIAM H. GREENE III, C/O W.H. GREENE & ASSOCIATES, INC.  
400 QUAKER ROAD  
EAST AURORA, NY 14052

TELEPHONE NUMBER

716-805-1090

EMAIL ADDRESS

BGREENE@WHGREENE.COM

FORM AND CONTENT OF APPLICATIONS

NO SPECIFIC FORM

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

APPROVAL OF AWARDS REQUIRES MAJORITY VOTE OF THE TRUSTEES

	<u>Recipient Name &amp; Address</u>	<u>Relationship</u>	<u>Purpose of Contribution</u>	<u>Dollar Amount</u>
1)	Women's and Children's Hospital of Buffalo Foundation 1028 Main St, Fl 4 Buffalo NY 14202	none	Support children's emergency room	\$2,500
2)	Hospice Foundation 225 Como Park Blvd Cheektowaga, NY 14227-1480	none	Support patients suffering from advanced illnesses	\$2,500
3)	Response for Love Center 130 Kosciuszko St Buffalo NY 14212	none	Support those people in need that attend St. Adelbert's	\$2,500
4)	Churches in Action 144 Long Ave Hamburg, NY 14075	none	Community Mission Work for the needy	\$1,500
5)	Villa Marie Convent 600 Doat St. Buffalo NY 14211	none	Support the Felician Nuns	\$1,500
6)	Community Health - Loyola 2611 W Chicago Ave Chicago, IL 60622	none	Support medical projects in the Chicago inner city	\$1,500
7)	WNY United Against Drug & Alcohol Abuse 1067 Harlem Road Cheektowaga, NY 14227	none	Support to WNY high school students who have abused drugs and alcohol	\$398
8)	Buffalo City Mission 100 East Tupper Buffalo, NY 14203	none	Support for Homeless of Buffalo	\$1,500
9)	Harvest House 1782 Seneca St Buffalo, NY 14210-1895	none	Support for Unwed Mothers	\$1,500
10)	Dunkirk Conference Center 3602 East Lake Road Dunkirk NY 14048	none	Support for UCC Church Camp	\$1,000
11)	Vanety Club Telethon 193 Delaware Ave Buffalo, NY 14202	none	Support medical research for children's illnesses	\$4,000
12)	Foundation of the Roman Catholic Diocese of Buffalo - Make A Difference Dinner 795 Main St Buffalo NY 14203-1250	none	Support for Catholic Education for the inner city people	\$2,750
13)	Roswell Park Alliance Foundation Elm and Carlton Sts Buffalo, NY 14263	none	Small Cell Lung Cancer Research	\$30,000
14)	St Francis High School 4129 Lake Shore Road Athol Springs, NY 14010	none	Support Catholic Education High School	\$40,500
15)	Retirement Fund for Religious 795 Main St Buffalo NY 14203-1250	none	Support of the retired religious in Buffalo	\$3,000
16)	Catholic Charities of Buffalo 525 Washington St Buffalo NY 14203	none	Support the needs for the poor in Buffalo NY	\$21,000
17)	St. Luke's Mission of Mercy 325 Walden Ave Buffalo NY 14211	none	Support the Corporal and Spiritual works of the Mercy	\$2,500
18)	St Bonaventure University 3261 W State Rd St. Bonaventure, NY 14778	none	Support the college fund raiser	\$6,650
19)	PUNT Foundaton 3859 North Buffalo Road Orchard Park, NY 14127	none	Fighting Pediatric Cancer	\$1,750
20)	Kathleen Mary House PO Box 2142 Blasdell, NY 14219	none	Support the charity in the assistance to abused mothers	\$3,000

FORM 990 PF  
**W H GREENE FOUNDATION**

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21)	NYS Right to Life Committee / Education Trust 41 State Street Suite M-100 Albany, NY 12207	none	Support to the education of people on right to life	\$1,000
22)	WNY Physically Challenged Youth Sports c/o Daniel P Murray / Lawley Services 701 Parkside Ave Buffalo, NY 14216	none	Support to physically challenged children	\$250
23)	Nativity of Our Lord School 4414 South Buffalo St Orchard Park NY 14127	none	Support to an Catholic elementary school	\$3,000
24)	American Lung Association 1595 Elmwood Ave Rochester, NY 14620	none	Support fight against lung cancer	\$1,000
25)	AVM Foundation 12 Halladay Lane Suite A Tonawanda, NY 14150	none	Supporting Young Adults in their fight Against Cancer	\$0
26)	St Vincent de Paul Society 4737 Lake Shore Rd Hamburg NY 14075	none	Donation to support this charities goals to help the poor	\$1,000
27)	Storehouse Mission PO Box 615 Orchard Park, NY 14127	none	Children's orphanage in Honduras	\$1,500
28)	Hand in Hand for Haiti 100 United Nations Plaza, Suite 43D New York, NY 10017	none	Education in Haiti	\$1,500
29)	Ballers For Jesus 4716 Whispering Wind Ave Tampa, FL 33614	none	Support youth sports program	\$2,000
30)	Hamburg Alumni Program PO Box 174 Hamburg NY 14075	none	Provide support for the enrichment of Hamburg central school district	\$300
31)	Friends of the Night People 394 Hudson St Buffalo NY 14201	none	Support a Buffalo charity who provides meals, clothing to the homeless	\$2,500
32)	SMART 28 S Shore Blvd Lackawanna, NY 14218	none	Spinal Muscular Atrophy Research Team	\$1,000
33)	Bison Children's Scholarship Fund PO Box 1134 Buffalo, NY 14205	none	Support children's early education	\$1,000
34)	Ride For Roswell Elm & Carlton Streets Buffalo, NY 14263	none	Support fight against cancer	\$4,782
35)	Sisters of St Francis 201 Rest Street Williamsville, NY 14221	none	Ministries and future needs of sisters	\$0
36)	Orchard Park Police Foundation PO Box 484 Orchard Park, NY 14127	none	Golf Tournament	\$1,000
37)	Canesus Fest for Charity, Inc PO Box 400 Buffalo, NY 14205	none	Children with Cancer	\$1,000
38)	Our Little Roses Foreign Mission Society PO Box 530947 Miami Shores, FL 33153-0947	none	Empowering and care for girls in Honduras	\$1,000
39)	Hilbert College 5200 South Park Ave Hamburg, NY 14075	none	Risk Management Program	\$25,000
40)	St. Francis DeSales Catholic Church 814 South Oakwood Ave Beckley, WV 25801-5928	none	Support corporal and spiritual works of St. Francis	\$1,000
41)	St Benedict Abbey 252 Still River Rd Harvard, MA 01451	none	Support the sharing of the Catholic Faith	\$1,000
42)	The Service Collaborative of WNY 173 Elm St Buffalo, NY 14203	none	Beds For Buffalo	\$0
43)	National Child Safety Council P O Box 16259 Rochester, NY 14616-0259	none	Safety Education Supplies for children	\$200
44)	Boys & Gns Club 1275 Peachtree Street NE Atlanta, GA 30309-3506	none	Supplies	\$250

FORM 990 PF  
W H GREENE FOUNDATION

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45)	St. Mary of the Lake 4737 Lake Shore Rd Hamburg, NY 14075	none	Support the church	\$200
46)	Girls Education Collaborative 640 Ellicott St Buffalo, NY 14203	none	Empowerng girls education	\$500
47)	Misencordia Heart of Mercy 6300 North Ridge Ave Chicago, IL 60660-1017	none	Care for special needs children	\$1,000
48)	US Foundation - New Fund for Global Health 4202 E Fowler Ave , ALC 100 Tampa, FL 33620	none	Global Health care for ones in need	\$25,000
49)	VA WNY Health Care System 3495 Bailey Ave Buffalo, NY 14215	none	Honor American Veterans with Healthcare	<u>\$1,000</u>
			Total	<u>\$210,528</u>