

Form **990-PF****Return of Private Foundation**

OMB No 1545-0052

Department of the Treasury
Internal Revenue Service

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

Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf**2016**

Open to Public Inspection

For calendar year 2016 or tax year beginning

, 2016, and ending

, 20

Name of foundation

AVIV FOUNDATION, INC.

Number and street (or P O box number if mail is not delivered to street address)

FOUNDATION SOURCE 501 SILVERSIDE RD

City or town, state or province, country, and ZIP or foreign postal code

WILMINGTON, DE 19809-1377

G Check all that apply

☐

Initial return

☐

Final return

☒

Address change

☐

Initial return of a former public charity

☐

Amended return

☐

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

I Fair market value of all assets at

end of year (from Part II, col (c), line

16) \$ 15,320,705.

J Accounting method

☒

Cash

☐

Accrual

☐ Other (specify)

(Part I, column (d) must be on cash basis)

A Employer identification number

47-4498674

B Telephone number (see instructions)

(800) 839-1754

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.☐**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) (see instructions))

	(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 (attach schedule)	15,220,672.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B.				
3 Interest on savings and temporary cash investments.	2,721.	2,721.		
4 Dividends and interest from securities	24,676.	23,391.		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	3,512.			
b Gross sales price for all assets on line 6a	16,149,211.			
7 Capital gain net income (from Part IV, line 2)		9,642,707.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	15,251,581.	9,668,819.		
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc.	0.			
14 Other employee salaries and wages	121,875.			121,875.
15 Pension plans, employee benefits	17,996.			17,996.
16a Legal fees (attach schedule) ATCH 1	37,411.			37,411.
b Accounting fees (attach schedule) ATCH 2	1,200.			1,200.
c Other professional fees (attach schedule) ATCH 3	44,628.	2,322.		42,306.
17 Interest				
18 Taxes (attach schedule) (see instructions) ATCH 4	192,800.			
19 Depreciation (attach schedule) and depletion				
20 Occupancy	9,577.			9,577.
21 Travel, conferences, and meetings	32,667.			32,667.
22 Printing and publications	372.			372.
23 Other expenses (attach schedule) ATCH 5	30,491.			30,491.
24 Total operating and administrative expenses Add lines 13 through 23.	489,017.	2,322.		293,895.
25 Contributions, gifts, grants paid	1,333,100.			1,333,100.
26 Total expenses and disbursements. Add lines 24 and 25	1,822,117.	2,322.	0.	1,626,995.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	13,429,464.			
b Net investment income (if negative, enter -0-)		9,666,497.		
c Adjusted net income (if negative, enter -0-)				

947 13

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments			1,181,130.	1,181,130.
	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 (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule) ▶				
		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 (attach schedule) [6]			4,725,141.	4,725,000.
	b	Investments - corporate stock (attach schedule) ATCH. 7	931,363.	3,004,556.		2,972,537.
	c	Investments - corporate bonds (attach schedule)				
	11	Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation (attach schedule) ▶					
12	Investments - mortgage loans					
13	Investments - other (attach schedule) ATCH. 8			5,450,000.	6,442,038.	
14	Land, buildings, and equipment basis ▶					
	Less: accumulated depreciation (attach schedule) ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	931,363.	14,360,827.		15,320,705.	
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 (attach schedule)				
	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 ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted	931,363.			
	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				
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds		14,360,827.		
	30	Total net assets or fund balances (see instructions)	931,363.	14,360,827.		
	31	Total liabilities and net assets/fund balances (see instructions)	931,363.	14,360,827.		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	931,363.
2	Enter amount from Part I, line 27a	2	13,429,464.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	14,360,827.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	14,360,827.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., 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.)
1 a SEE PART IV SCHEDULE					
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					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))		
a					
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	9,642,707.	
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) (see instructions) If (loss), enter -0- in Part I, line 8			3	0.	

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 does not qualify under section 4940(e). Do not complete this part.

(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))
2015	90,000.	76,450.	1.177240
2014			
2013			
2012			
2011			
2 Total of line 1, column (d)			2 1.177240
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years.			3 1.177240
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 10,068,575.
5 Multiply line 4 by line 3.			5 11,853,129.
6 Enter 1% of net investment income (1% of Part I, line 27b).			6 96,665.
7 Add lines 5 and 6.			7 11,949,794.
8 Enter qualifying distributions from Part XII, line 4. If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions			8 1,626,995.

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)		1	193,330.
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			
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	
3 Add lines 1 and 2		3	193,330.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	193,330.
6 Credits/Payments			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a	192,800.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	530.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	193,330.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> 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		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2017 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

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 Instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
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		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <u>ATCH 9</u> If "Yes," attach the statement required by General Instruction T	X	
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> MD,		
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	X	
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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

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).	11	Yes	No
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).	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	X	
14	The books are in care of ▶ FOUNDATION SOURCE Telephone no ▶ 800-839-1754 Located at ▶ 501 SILVERSIDE ROAD, SUITE 123 WILMINGTON, DE ZIP+4 ▶ 19809-1377			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year. ▶ 15			
16	At any time during calendar year 2016, 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	Yes	No
				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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
(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 checked="" type="checkbox"/>	Yes	<input 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. ▶ <input type="checkbox"/>	1b		X
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 2016?	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 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If "Yes," list the years ▶		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶			
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 2016 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 2016)	3b		
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 2016?	4b		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**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))? ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). ☐ Yes ☒ 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? ☐ Yes ☒ 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)? ☐ **5b**Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ **6b** X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ **7b****Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(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
ATCH 10		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1 - see instructions). 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
ATCH 11		121,875.	8,186.	0.

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

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."

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

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

	Amount
1 NONE	
2	
All other program-related investments See instructions	
3 NONE	

Total. Add lines 1 through 3 ▶

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	2,475,472.
b	Average of monthly cash balances	1b	4,507,812.
c	Fair market value of all other assets (see instructions).	1c	3,238,620.
d	Total (add lines 1a, b, and c)	1d	10,221,904.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	10,221,904.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	153,329.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	10,068,575.
6	Minimum investment return. Enter 5% of line 5	6	503,429.

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	503,429.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	193,330.
b	Income tax for 2016 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	193,330.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	310,099.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	310,099.
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	310,099.

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	1,626,995.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,626,995.
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 (see instructions)	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,626,995.

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 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				310,099.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.				
b Total for prior years 20 <u>14</u> , 20 <u>13</u> , 20 <u>12</u>				
3 Excess distributions carryover, if any, to 2016				
a From 2011				
b From 2012				
c From 2013				
d From 2014				
e From 2015 86,177.				
f Total of lines 3a through e	86,177.			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>1,626,995.</u>				
a Applied to 2015, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions).				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2016 distributable amount.				310,099.
e Remaining amount distributed out of corpus.	1,316,896.			
5 Excess distributions carryover applied to 2016 . (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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,403,073.			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount - see instructions.				
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017.				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	1,403,073.			
10 Analysis of line 9				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014				
d Excess from 2015 86,177.				
e Excess from 2016 1,316,896.				

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

NOT APPLICABLE

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 2016, 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) 2016	(b) 2015	(c) 2014	(d) 2013	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see instructions.)**1 Information Regarding Foundation Managers:**

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

ATTACHMENT 12

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

N/A

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. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

b The form in which applications should be submitted and information and materials they should include

c Any submission deadlines

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

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

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

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)				
a Paid during the year				
<p>ATCH 13</p>				
Total			▶ 3a	1,333,100.
b Approved for future payment				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments .			14	2,721.		
4 Dividends and interest from securities			14	24,676.		
5 Net rental income or (loss) from real estate						
a Debt-financed property						
b Not debt-financed property						
6 Net rental income or (loss) from personal property. .						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory			18	3,512.		
9 Net income or (loss) from special events . . .						
10 Gross profit or (loss) from sales of inventory . .						
11 Other revenue a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)				30,909.		
13 Total. Add line 12, columns (b), (d), and (e)				30,909.		

[illegible]

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.

▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990

OMB No 1545-0047

2016

Name of the organization

AVIV FOUNDATION, INC.

Employer identification number

47-4498674

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, 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).

Name of organization **AVIV FOUNDATION, INC.**Employer identification number
47-4498674**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	LAUFER, CHANI 15 W. LENOX CHEVY CHASE, MD 20815	\$ 15,220,672.	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)
		\$	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 **AVIV FOUNDATION, INC.**

Employer identification number

47-4498674

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	VANGUARD INSTITUTIONAL INDEX FUND INSTI VIII, 39966.483 SH.	\$ 7,731,117.	06/06/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	ADOBE SYSTEMS, INC ADBE, 3112 SH.	\$ 309,706.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	ALLEGION PLC ALLE, 709 SH.	\$ 48,286.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	ALLERGAN PLC AGN, 1 SH.	\$ 234.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	ALPHABET INC CL A GOOGL, 438 SH.	\$ 325,197.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	ALPHABET INC CL C GOOG, 439 SH.	\$ 320,017.	05/27/2016

Name of organization **AVIV FOUNDATION, INC.**

Employer identification number

47-4498674

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	ANTHEM INC ANTM, 630 SH.	\$ 82,061.	05/27/2016
1	APPLIED MATERIALS INC AMAT, 3633 SH.	\$ 87,882.	05/27/2016
1	AUTOMATIC DATA PROCESSING INC ADP, 201 SH.	\$ 17,649.	05/27/2016
1	AUTOZONE INC AZO, 122 SH.	\$ 93,751.	05/27/2016
1	BECTON DICKINSON & CO BDX, 539 SH.	\$ 89,954.	05/27/2016
1	BOSTON SCIENTIFIC BSX, 4667 SH.	\$ 105,334.	05/27/2016

Name of organization AVIV FOUNDATION, INC.

Employer identification number

47-4498674

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	BRISTOL-MYERS SQUIBB CO BMY, 5477 SH.	\$ 389,552.	05/27/2016
1	CINTAS CRP CTAS, 2381 SH.	\$ 224,695.	05/27/2016
1	COSTCO WHOLESALE CORPORATION COST, 113 SH.	\$ 16,887.	05/27/2016
1	CVS CAREMARK CORP CVS, 3830 SH.	\$ 371,453.	05/27/2016
1	DANAHER CORP DHR, 199 SH.	\$ 19,722.	05/27/2016
1	DOLLAR TREE INC DLTR, 146 SH.	\$ 12,919.	05/27/2016

Name of organization **AVIV FOUNDATION, INC.**

Employer identification number

47-4498674

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	DOW CHEMICAL PV DOW, 150 SH.	\$ 7,801.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	FACEBOOK INC FB, 4692 SH.	\$ 560,366.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	FISERV INC FISV, 303 SH.	\$ 31,735.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	GEN DYNAMICS CP GD, 2101 SH.	\$ 300,674.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	HONEYWELL INTL HON, 83 SH.	\$ 9,483.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	KRAFT HEINZ CO KHC, 1 SH.	\$ 84.	05/27/2016

Name of organization **AVIV FOUNDATION, INC.**

Employer identification number

47-4498674

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	KROGER CO KR, 5900 SH. 	\$ 209,745.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	L-3 COMMUNICATIONS CORP LLL123116, 180 SH. 	\$ 24,797.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	LAM RESEARCH CORP LRCX, 724 SH. 	\$ 59,574.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	LOCKHEED MARTIN CORP LMT, 1616 SH. 	\$ 387,864.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	LOWES COMPANIES INC LOW, 1820 SH. 	\$ 146,201.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	MCCORMICK & CO MKC, 292 SH. 	\$ 28,517.	05/27/2016

Name of organization **AVIV FOUNDATION, INC.**

Employer identification number

47-4498674

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	MICROSOFT CORP MSFT, 9668 SH.	\$ 503,171.	05/27/2016
1	MONDELEZ INTERNATIONAL INC MDLZ, 681 SH.	\$ 30,335.	05/27/2016
1	MOODYS CORP MCO, 1137 SH.	\$ 111,773.	05/27/2016
1	NEXTERA ENERGY, INC NEE, 168 SH.	\$ 20,101.	05/27/2016
1	NIKE INC-CL B NKE, 1160 SH.	\$ 65,256.	05/27/2016
1	PFIZER INC PFE, 557 SH.	\$ 19,253.	05/27/2016

Name of organization **AVIV FOUNDATION, INC.**

Employer identification number

47-4498674

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	PHILLIPS 66 PSX, 1 SH.	\$ 80.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	REYNOLDS AMERICAN INC RAI, 5408 SH.	\$ 271,833.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	S&P GLOBAL INC COM SPGI, 1014 SH.	\$ 112,625.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	SALESFORCE.COM CRM, 317 SH.	\$ 26,439.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	ST. JUDE MED INC STJ, 1518 SH.	\$ 118,419.	05/27/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	STARBUCKS CORP COM SBUX, 2556 SH.	\$ 141,411.	05/27/2016

Name of organization **AVIV FOUNDATION, INC.**

Employer identification number

47-4498674

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	STRYKER CORPORATION SYK, 711 SH.	\$ 79,404.	05/27/2016
1	TEXAS INSTRUMENTS INC TXN, 2315 SH.	\$ 140,902.	05/27/2016
1	THERMO FISHER SCIENTIFIC INC TMO, 2312 SH.	\$ 349,713.	05/27/2016
1	TOTAL SYSTEMS SERVICES INC TSS, 1786 SH.	\$ 95,855.	05/27/2016
1	TYCO INTERNATIONAL LTD TYC, 64 SH.	\$ 2,732.	05/27/2016
1	UNITEDHEALTH GROUP INC UNH, 5062 SH.	\$ 677,017.	05/27/2016

Name of organization **AVIV FOUNDATION, INC.**

Employer identification number

47-4498674

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	WALGREENS BOOTS ALLIANCE WBA, 1547 SH.	\$ 119,026.	05/27/2016
1	WALT DISNEY HOLDINGS CO DIS, 2929 SH.	\$ 293,398.	05/27/2016
1	ZIMMER BIOMET HOLDINGS ZBH, 179 SH.	\$ 21,971.	05/27/2016
1	STRYKER CORPORATION SYK, 60 SH.	\$ 6,701.	05/27/2016
		\$	
		\$	

Name of organization **AVIV FOUNDATION, INC.**

Employer identification number

47-4498674

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 information once See instructions.) ► \$ _____

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

ATTACHMENT 1

FORM 990PF, PART I - LEGAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
GENERAL CONSULTATIONS	37,411.			37,411.
TOTALS	<u>37,411.</u>			<u>37,411.</u>

ATTACHMENT 2

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX RETURN PREPARATION/REVIEW	1,200.			1,200.
TOTALS	<u>1,200.</u>			<u>1,200.</u>

ATTACHMENT 3

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>CHARITABLE PURPOSES</u>
ADMINISTRATION OF FOUNDATION	4,611.		4,611.
EMPLOYEE RECRUITING	3,623.		3,623.
INVESTMENT MANAGEMENT SERVICES	2,322.	2,322.	
PHILANTHROPIC CONSULTING SRVCS	28,500.		28,500.
LEADERSHIP COACHING/CONSULTING	5,572.		5,572.
TOTALS	<u>44,628.</u>	<u>2,322.</u>	<u>42,306.</u>

ATTACHMENT 4FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
990-PF ESTIMATED TAX FOR 2016	192,800.
TOTALS	<u>192,800.</u>

ATTACHMENT 5

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	CHARITABLE PURPOSES
ADMINISTRATIVE FEES	9,791.	9,791.
ADMINISTRATIVE SET-UP FEE	7,500.	7,500.
CELL PHONE FEES	843.	843.
COMPUTERS/ELECTRONIC DEVICES	3,538.	3,538.
EQUIPMENT MAINTENANCE	518.	518.
EQUIPMENT/FURNITURE PURCHASE	661.	661.
FOUNDATION DUES & MEMBERSHIPS	750.	750.
INDEMNIFICATION INSURANCE	2,250.	2,250.
OFFICE SUPPLIES	3,096.	3,096.
PAYROLL PROCESSING FEES	1,175.	1,175.
POSTAGE/DELIVERY SERVICE	27.	27.
REGISTERED AGENT FEE	342.	342.
TOTALS	<u>30,491.</u>	<u>30,491.</u>

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

ATTACHMENT 6

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
BAY AREA TOLL AUTH CALIF BDS -	400,013.	400,000.
CALIFORNIA ST VAR REV BDS - 0.	275,008.	275,000.
CLARK CNTY NEV ARPT BOND - 0.5	300,009.	300,000.
COLORADO SPRINGS BDS - 0.570%	350,009.	350,000.
EAST BAY CALIF MUN UTIL DIST W	300,009.	300,000.
JEA FLA WTR & SWR BDS - 0.006%	400,012.	400,000.
LOS ANGELES CALIF DEPT WTR & P	300,009.	300,000.
MASSACHUSETTS BAY TRANSN AUTH	300,009.	300,000.
MASSACHUSETTS ST WTRRES BOND -	300,009.	300,000.
NEW YORK N Y CITY MUN WTR FIN	400,012.	400,000.
NEW YORK N Y GO BDS SER - 0.00	300,009.	300,000.
NEW YORK ST REF BDS - 0.570% -	300,009.	300,000.
OHIO ST UNIV BDS - 0.520% - 06	400,012.	400,000.
UNIVERSITY MICHIGAN BDS - 0.00	400,012.	400,000.
STATE OBLIGATIONS TOTAL	<u>4,725,141.</u>	<u>4,725,000.</u>

FORM 990PF, PART II - CORPORATE STOCK

ATTACHMENT 7

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
BLACKROCK TOTAL RETURN CL INST	891,692.	864,188.
BUFFALO DISCOVERY FUND	46,118.	44,637.
DIAMOND HILL LONG SHORT FUND C	82,812.	84,547.
EVERMORE GLOBAL VALUE INST	101,245.	110,504.
FPA CAPITAL FUND	140,061.	149,990.
JP MORGAN CORE BOND FUND	895,469.	859,122.
MATTHEWS ASIA PACIFIC INST'L	101,142.	91,026.
MUTUAL EUROPEAN FD CL Z	102,351.	104,901.
POLEN GROWTH FUND INSTITUTIONA	80,077.	78,525.
SPDR S&P 500 ETF TRUST	301,942.	310,707.
TOUCHSTONE FDS GROUP TR SMLCAP	135,557.	142,773.
VICTORY GLOBAL NATURAL RESOURC	44,965.	48,249.
VULCAN VALUE PARTNERS FD	81,125.	83,368.
TOTALS	<u>3,004,556.</u>	<u>2,972,537.</u>

ATTACHMENT 8

FORM 990PF, PART II - OTHER INVESTMENTS

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
MEDALLION CAPITAL INVESTMENTS	5,450,000.	6,442,038.
TOTALS	<u>5,450,000.</u>	<u>6,442,038.</u>

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
16149211.		PUBLICLY-TRADED SECURITIES 6,506,504.					9,642,707.	
TOTAL GAIN(LOSS)					<u>9,642,707.</u>	

ATTACHMENT 9FORM 990PF, PART VII-A - LIQUIDATION, TERMINATION, ETC. STATEMENT

AS EXPLAINED BELOW, THE FOUNDATION HAS NO PLANS FOR DISSOLUTION.

THIS STATEMENT IS SUBMITTED TO REPORT THE DISTRIBUTION OF CERTAIN ASSETS DURING THE YEAR. THE DISTRIBUTIONS RESULTED IN A SUBSTANTIAL CONTRACTION OF ASSETS.

THE FOLLOWING INFORMATION IS SUBMITTED IN ACCORDANCE WITH TREASURY REGULATION SECTION 1.6043-3(A)(1) AND THE FORM 990-PF INSTRUCTIONS: DURING THE TAXABLE YEAR ENDING DECEMBER 31, 2016, THE FOUNDATION MADE DISTRIBUTIONS FROM ASSETS FROM SOURCES OTHER THAN CURRENT INCOME. COLLECTIVELY, THE DISTRIBUTIONS IN EXCESS OF CURRENT INCOME TOTALED \$1,333,100. THIS AMOUNT REPRESENTS OVER 25% OF THE FOUNDATION'S NET ASSETS OF \$931,363 (AS MEASURED BY FAIR MARKET VALUE) AT THE BEGINNING OF THE FOUNDATION'S TAXABLE YEAR ENDING DECEMBER 31, 2016. ALTHOUGH THE FOUNDATION TECHNICALLY EXPERIENCED A SUBSTANTIAL CONTRACTION, IT WILL CONTINUE IN EXISTENCE AND HAS NO PLANS FOR DISSOLUTION.

THE FOUNDATION MADE DISTRIBUTIONS OF CASH TO THE GRANTEEES LISTED IN THE ATTACHMENT TO PART XV, LINE 3A; EACH SUCH GRANT WAS MADE SOLELY FOR THE CHARITABLE PURPOSE SPECIFIED THEREIN.

AVIV FOUNDATION, INC.

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FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 10

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION		COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
CHANI LAUFER FOUNDATION SOURCE 501 SILVERSIDE RD WILMINGTON, DE 19809-1377	PRES / DIR	5.00	0.	0.	0.
STEVEN LAUFER FOUNDATION SOURCE 501 SILVERSIDE RD WILMINGTON, DE 19809-1377	DIR / TREAS / SEC	1.00	0.	0.	0.
GRAND TOTALS			0.	0.	0.

990PF, PART VIII - COMPENSATION OF THE FIVE HIGHEST PAID EMPLOYEES

ATTACHMENT 11

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>
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ADAM M SIMON
FOUNDATION SOURCE
501 SILVERSIDE RD
WILMINGTON, DE 19809-1377

EXECUTIVE DIRECTOR 40.00	121,875.	8,186.
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TOTAL COMPENSATION	121,875.	8,186.
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Part XIII (990-PF) – Undistributed Income

The Form 990-PF for taxable year ending December 31, 2015 of Aviv Foundation, Inc (the "Foundation") understated the amount of excess grant carryover made during the year because the Foundation's former tax preparer at that time did not record Parts XI and XIII properly. The Foundation's new tax preparer discovered this error while preparing Form 990-PF for taxable year ending December 31, 2016. The Foundation would not have been subject to an underdistribution penalty under §4942 for the year 2015 if Parts XI and XIII had been properly recorded. Therefore, the Foundation has chosen not to amend Form 990-PF for taxable year ending December 31, 2015. Instead, the Foundation has adjusted the amounts reported in Part XIII, Line 3 of Form 990-PF for year ending December 31, 2016 to reflect the correct balances on line 3f.

ATTACHMENT 12

FORM 990PF, PART XV - INFORMATION REGARDING FOUNDATION MANAGERS

CHANI LAUFER
STEVEN LAUFER

FORM 990PF, PART XIV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION STATUS OF RECIPIENT			
AMERICAN FRIENDS OF ITIM INC 800 3RD AVE 28TH FL NEW YORK, NY 10022	N/A PC		GENERAL & UNRESTRICTED	3,000
AMERICAN FRIENDS OF LEKET ISRAEL INC 384 WARWICK AVE TEANECK, NJ 07666	N/A PC		GENERAL & UNRESTRICTED	60,000
AMERICAN FRIENDS OF THE HEBREW UNIVERSITY INC ONE BATTERY PARK PL2, 25TH FL NEW YORK, NY 10004	N/A PC		HARUV PROGRAM	3,600
AMERICAN FRIENDS OF TZOHAR 1417 CONEY ISLAND AVE BROOKLYN, NY 11230	N/A PC		GENERAL & UNRESTRICTED	3,000
ENCOUNTER PROGRAMS INCORPORATED 25 BROADWAY, STE 1700 NEW YORK, NY 10004	N/A PC		GENERAL & UNRESTRICTED	10,000.
GREATER WASHINGTON JEWISH COALITION AGAINST DOMEST 6183 EXECUTIVE BLVD ROCKVILLE, MD 20852	N/A PC		OFFICE AND COUNSELING SPACE FUND	40,000

ATTACHMENT 13

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION STATUS OF RECIPIENT			
HOMELESS CHILDRENS PLAYTIME PROJECT INC 1525 NEWTON ST NW WASHINGTON, DC 20010	N/A	PC	GENERAL & UNRESTRICTED	25,000
JERUSALEM FOUNDATION INC 420 LEXINGTON AVE STE 1645 NEW YORK, NY 10170	N/A	PC	HAREIDI COLLEGE	3,600
JERUSALEM FOUNDATION INC 420 LEXINGTON AVE STE 1645 NEW YORK, NY 10170	N/A	PC	MISHKENOT SHAANANIM/TALKING PEACE FUND	50,000
JEWISH COMMUNAL FUND 575 MADISON AVE STE 703 NEW YORK, NY 10022	N/A	PC	GENERAL & UNRESTRICTED	10,000
JEWISH COMMUNAL FUND 575 MADISON AVE STE 703 NEW YORK, NY 10022	N/A	PC	INTERNATIONAL BEIT DIN	50,000.
JEWISH FUNDERS NETWORK 150 W 30TH ST NEW YORK, NY 10001	N/A	PC	SOCIAL VENTURE FUND FOR JEWISH ARAB EQUALITY AND SHARED SOCIETY	50,000

AVIV FOUNDATION, INC.

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FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
JEWISH NATIONAL FUND -KEREN KAYEMETH LEISRAEL- INC 78 RANDALL AVE ROCKVILLE CTR, NY 11570	N/A PC		GENERAL & UNRESTRICTED	20,000
JEWISH ORTHODOX FEMINIST ALLIANCE INC 520 8TH AVE 4TH FL NEW YORK, NY 10018	N/A PC		CHARITABLE EVENT	10,000
JEWISH WOMEN INTERNATIONAL 1129 20TH ST NW STE 801 WASHINGTON, DC 20036	N/A PC		GET SMART INITIATIVE	60,000
JEWISH WOMEN INTERNATIONAL 1129 20TH ST NW STE 801 WASHINGTON, DC 20036	N/A PC		CHARITABLE EVENT	10,000.
KBY CONGREGATIONS TOGETHER INC PO BOX 23170 BROOKLYN, NY 11202	N/A PC		TZION - AN ERETZ ISRAELI COMMUNITY	10,000
KIDS4PEACE INTERNATIONAL INC 110 MARYLAND AVE NE STE 205 WASHINGTON, DC 20002	N/A PC		HUB FOR YOUTH PEACE GROUPS PROJECT	40,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
LAWYERS FOR CHILDREN INC 110 LAFAYETTE ST NEW YORK, NY 10013	N/A PC	GENERAL & UNRESTRICTED	100,000
LETS GET READY INC 50 BROADWAY 25TH FL NEW YORK, NY 10004	N/A PC	EVALUATION DATA MANAGEMENT PLATFORM AND OPERATIONS SUPPORT	37,000
NATIONAL CENTER FOR FAMILY PHILANTHROPY INC 1667 CONNECTICUT AVE NW STE 220 WASHINGTON, DC 20006	N/A PC	FRIENDS OF THE FAMILY FUND	1,000
NATIONAL RUNAWAY SWITCHBOARD 3141 B N LINCOLN AVE CHICAGO, IL 60657	N/A PC	GENERAL & UNRESTRICTED	3,000
NEWTON COMMUNITY YOUTH ACTIVITIES LEAGUE INC 3400 S CENTRAL AVE LOS ANGELES, CA 90011	N/A PC	GENERAL & UNRESTRICTED	30,000
NORTH AMERICAN FRIENDS OF MOED INC 897 LAKESIDE DR WOODMERE, NY 11598	N/A PC	GENERAL & UNRESTRICTED	3,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
OAKBROOK CHURCH 1700 RESTON PKWY RESTON, VA 20194	N/A PC	FRIENDS OF ROOTS DIVISION	1,800
OHEV SHOLOM-THE NATIONAL SYNAGOGUE 1600 JONQUIL ST NW WASHINGTON, DC 20012	N/A PC	FOCUS ON ISRAEL PROGRAM	30,000
ORGANIZATION FOR THE RESOLUTION OF AGUNOT INC 551 W 181ST ST STE 123 NEW YORK, NY 10033	N/A PC	2016-2017 CAMPUS FELLOWSHIP PROGRAM	15,000
PARDES INSTITUTE OF JEWISH STUDIES NORTH AMERICA I 5 W 37TH ST STE 802 NEW YORK, NY 10018	N/A PC	GENERAL & UNRESTRICTED	3,600
SACRED SPACES 82 NASSAU ST #358 NEW YORK, NY 10038	N/A PC	GENERAL & UNRESTRICTED	20,000.
SPARK PROGRAM INC 223 W JACKSON BLVD STE 520 CHICAGO, IL 60606	N/A PC	GENERAL & UNRESTRICTED	35,000

AVIV FOUNDATION, INC

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FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SPRINGBOARD COLLABORATIVE TWO PENN CENTER STE 1315 1500 JOHN PHILADELPHIA, PA 19102	N/A PC	GENERAL & UNRESTRICTED	36,000
SULAM INC 13300 ARCTIC AVE ROCKVILLE, MD 20853	N/A PC	GENERAL & UNRESTRICTED	75,000
SUMMER BEIT MIDRASH INC 63 S PLEASANT ST SHARON, MA 02067	N/A PC	CENTER FOR MODERN TORAH LEADERSHIP	36,000
SUNFLOWER BAKERY INC 8507 ZIGGY LN GAITHERSBURG, MD 20877	N/A PC	GENERAL & UNRESTRICTED	10,000
THE BARUCH COLLEGE FUND ONE BERNARD BARUCH WAY BOX A-1603 NEW YORK, NY 10010	N/A PC	KATZEN PUBLIC INTEREST FELLOWSHIP PROGRAM	48,500
THE JEWISH FEDERATION OF GREATER WASHINGTON INC 6101 EXECUTIVE BLVD STE 100 N BETHESDA, MD 20852	N/A PC	GENERAL & UNRESTRICTED	50,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
THE JEWISH FEDERATION OF GREATER WASHINGTON INC 6101 EXECUTIVE BLVD STE 100 N BETHESDA, MD 20852	N/A PC	UIA, IN SUPPORT OF EIN PRAT ACADEMY FOR LEADERSHIP	100,000
THE SHALOM HARTMAN INSTITUTE OF NORTH AMERICA ONE PENN PLZ STE 1606 NEW YORK, NY 10119	N/A PC	JEWISH-ARAB COEXISTENCE EFFORTS FUND	40,000
WOMANS NETWORK FOR SINGLE PARENTS INC 1764 49TH ST BROOKLYN, NY 11204	N/A PC	GENERAL & UNRESTRICTED	50,000
YESHIVAT CHOVEVEI TORAH RABBINICAL SCHOOL LTD 3700 HENRY HUDSON PKWY 2ND FL RIVERDALE, NY 10463	N/A PC	GENERAL & UNRESTRICTED	150,000
TOTAL CONTRIBUTIONS PAID			<u>1,333,100</u>