

Form **990-PF**  
 Department of the Treasury  
 Internal Revenue Service

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

▶ **Do not enter social security numbers on this form as it may be made public.**  
 ▶ **Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).**

OMB No 1545-0052  
**2016**  
**Open to Public Inspection**

**For calendar year 2016, or tax year beginning 01-01-2016, and ending 12-31-2016**

Name of foundation THE LOIS AND RICHARD ENGLAND FOUNDATION INC C/O RICHARD ENGLAND JR		<b>A Employer identification number</b> 52-1691418
Number and street (or P O box number if mail is not delivered to street address) PO BOX 34-1107	Room/suite	<b>B Telephone number (see instructions)</b> (301) 657-7737
City or town, state or province, country, and ZIP or foreign postal code WEST BETHESDA, MD 20827		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 24,741,179	<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

<b>Part I Analysis of Revenue and Expenses</b> <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)				
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	<b>3</b> Interest on savings and temporary cash investments	15,308	15,308		
	<b>4</b> Dividends and interest from securities	440,403	440,403		
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	964,505			
	<b>b</b> Gross sales price for all assets on line 6a	2,212,058			
	<b>7</b> Capital gain net income (from Part IV, line 2)		964,505		
	<b>8</b> Net short-term capital gain				
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)	21,167	4,591			
<b>12 Total.</b> Add lines 1 through 11	1,441,383	1,424,807			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc	0	0		0
	<b>14</b> Other employee salaries and wages				
	<b>15</b> Pension plans, employee benefits				
	<b>16a</b> Legal fees (attach schedule)				
	<b>b</b> Accounting fees (attach schedule)	9,880	3,440		3,440
	<b>c</b> Other professional fees (attach schedule)	374,671	156,792		217,879
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions)	96,868	9,020		0
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy	15,845	0		15,845
	<b>21</b> Travel, conferences, and meetings	5,345	0		5,345
	<b>22</b> Printing and publications	400	0		400
	<b>23</b> Other expenses (attach schedule)	23,222	5,589		17,578
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	526,231	174,841		260,487
	<b>25</b> Contributions, gifts, grants paid	1,000,483			1,046,209
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	1,526,714	174,841		1,306,696	
<b>27</b> Subtract line 26 from line 12					
<b>a Excess of revenue over expenses and disbursements</b>	-85,331				
<b>b Net investment income</b> (if negative, enter -0-)		1,249,966			
<b>c Adjusted net income</b> (if negative, enter -0-)					

<b>Part II Balance Sheets</b> 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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	127,059	200,171	200,171
	<b>2</b> Savings and temporary cash investments . . . . .	455,961	235,462	235,462
	<b>3</b> Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>4</b> Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .			
	<b>10a</b> Investments—U S and state government obligations (attach schedule)			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	16,026,514	16,284,603	21,061,582
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .			
	<b>11</b> Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .			
	<b>14</b> Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)	2,379,854	2,183,821	3,243,964	
<b>16 Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	18,989,388	18,904,057	24,741,179	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .			
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	0	0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	<b>24</b> Unrestricted . . . . .			
	<b>25</b> Temporarily restricted . . . . .			
	<b>26</b> Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 27 through 31.</b>			
	<b>27</b> Capital stock, trust principal, or current funds . . . . .	0	0	
	<b>28</b> Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
<b>29</b> Retained earnings, accumulated income, endowment, or other funds	18,989,388	18,904,057		
<b>30 Total net assets or fund balances</b> (see instructions) . . . . .	18,989,388	18,904,057		
<b>31 Total liabilities and net assets/fund balances</b> (see instructions) .	18,989,388	18,904,057		

<b>Part III Analysis of Changes in Net Assets or Fund Balances</b>			
<b>1</b> 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)		<b>1</b>	18,989,388
<b>2</b> Enter amount from Part I, line 27a . . . . .		<b>2</b>	-85,331
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____		<b>3</b>	0
<b>4</b> Add lines 1, 2, and 3 . . . . .		<b>4</b>	18,904,057
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____		<b>5</b>	0
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .		<b>6</b>	18,904,057

**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)
<b>1a</b> See Additional Data Table			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

(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)
<b>a</b> See Additional Data Table			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

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) 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	
<b>a</b> See Additional Data Table			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> Capital gain net income or (net capital loss)	2	964,505
{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	3	
{ If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		

**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.

**1** Enter the appropriate amount in each column for each year, see 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))
2015	1,124,142	25,201,660	0.044606
2014	1,375,531	22,333,854	0.061590
2013	2,870,798	21,167,569	0.135622
2012	2,395,742	23,014,161	0.104099
2011	2,775,437	21,469,107	0.129276
<b>2</b> Total of line 1, column (d)			0.475193
<b>3</b> 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			0.095039
<b>4</b> Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			25,142,065
<b>5</b> Multiply line 4 by line 3			2,389,477
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			12,500
<b>7</b> Add lines 5 and 6			2,401,977
<b>8</b> Enter qualifying distributions from Part XII, line 4			1,306,696

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)

Table with 11 rows for excise tax calculation. Includes sub-tables for 6a-6d (Credits/Payments) and 9a-9d (Tax due/Overpayment). Total tax due is 192.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question number, 'Yes', and 'No' boxes. Questions cover political activities, tax on political expenditures, and state reporting requirements.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-14 regarding controlled entities, distribution to donor advised funds, public inspection requirements, and books in care of.

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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.

Table with 3 columns: Question, Yes, No. Row 16 regarding interest in or authority over a bank, securities, or other financial account in a foreign country.

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

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

Main table with 3 columns: Question, Yes, No. Rows 1a-4b regarding Form 4720 exceptions and requirements.

**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)?  Yes  No

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?  Yes  No

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?  Yes  No

**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	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

**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	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				

**Total** number of other employees paid over \$50,000.  Yes  No 0

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

<b>3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".</b>		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
<b>Total number of others receiving over \$50,000 for professional services.</b>		<b>0</b>

**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
<b>1</b>	
<b>2</b>	
<b>3</b>	
<b>4</b>	

**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
<b>1</b>	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3	<b>0</b>

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities.	<b>1a</b>	25,109,407
<b>b</b>	Average of monthly cash balances.	<b>1b</b>	415,532
<b>c</b>	Fair market value of all other assets (see instructions).	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c).	<b>1d</b>	25,524,939
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets.	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d.	<b>3</b>	25,524,939
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	<b>4</b>	382,874
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4.	<b>5</b>	25,142,065
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5.	<b>6</b>	1,257,103

**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.)

<b>1</b>	Minimum investment return from Part X, line 6.	<b>1</b>	1,257,103
<b>2a</b>	Tax on investment income for 2016 from Part VI, line 5.	<b>2a</b>	24,999
<b>b</b>	Income tax for 2016 (This does not include the tax from Part VI).	<b>2b</b>	1,051
<b>c</b>	Add lines 2a and 2b.	<b>2c</b>	26,050
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	1,231,053
<b>4</b>	Recoveries of amounts treated as qualifying distributions.	<b>4</b>	0
<b>5</b>	Add lines 3 and 4.	<b>5</b>	1,231,053
<b>6</b>	Deduction from distributable amount (see instructions).	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	<b>7</b>	1,231,053

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	<b>1a</b>	1,306,696
<b>b</b>	Program-related investments—total from Part IX-B.	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required).	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule).	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	<b>4</b>	1,306,696
<b>5</b>	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).	<b>5</b>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	1,306,696

**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
<b>1</b> Distributable amount for 2016 from Part XI, line 7				1,231,053
<b>2</b> Undistributed income, if any, as of the end of 2016				
<b>a</b> Enter amount for 2015 only. . . . .			0	
<b>b</b> Total for prior years 20___, 20___, 20___		0		
<b>3</b> Excess distributions carryover, if any, to 2016				
<b>a</b> From 2011. . . . .	1,732,034			
<b>b</b> From 2012. . . . .	1,255,536			
<b>c</b> From 2013. . . . .	1,848,856			
<b>d</b> From 2014. . . . .	297,874			
<b>e</b> From 2015. . . . .				
<b>f</b> Total of lines 3a through e. . . . .	5,134,300			
<b>4</b> Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ _____ 1,306,696				
<b>a</b> Applied to 2015, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2016 distributable amount. . . . .				1,231,053
<b>e</b> Remaining amount distributed out of corpus	75,643			
<b>5</b> Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a) )				0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	5,209,943			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .		0		
<b>c</b> 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		
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
<b>e</b> Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017 . . . . .				0
<b>7</b> 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		
<b>8</b> Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions). . . . .	1,732,034			
<b>9</b> Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a . . . . .	3,477,909			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2012. . . . .	1,255,536			
<b>b</b> Excess from 2013. . . . .	1,848,856			
<b>c</b> Excess from 2014. . . . .	297,874			
<b>d</b> Excess from 2015. . . . .				
<b>e</b> Excess from 2016. . . . .	75,643			

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

**1a** 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 organization is a private operating foundation described in section  4942(j)(3) or  4942(j)(5)

**2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .

	Tax year		Prior 3 years		(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> 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 organization 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) )

**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

**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

MAGGIE HUDAK PROGRAM ADMINISTRATOR  
PO BOX 34-1107  
WEST BETHESDA, MD 20827  
(301) 657-7737

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

IN WRITING, INCLUDE AN ANNUAL REPORT, A COPY OF THE IRS DETERMINATION LETTER AND ANY OTHER LITERATURE/INFORMATION RELATED TO THE ORGANIZATION

**c** Any submission deadlines

FALL AND SPRING

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

THE FOUNDATION IS ORGANIZED AND OPERATED EXCLUSIVELY FOR CHARITABLE, SCIENTIFIC, LITERARY AND EDUCATIONAL TAX-EXEMPT PURPOSES, THE ORGANIZATION MUST BE ORGANIZED IN THE US OR ANY OF ITS POSSESSIONS, AND ANY GRANTS OR GIFTS TO THE ORGANIZATION MUST BE USED WITHIN THE US OR ANY OF ITS POSSESSIONS

**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)				
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total . . . . .</b> ▶ <b>3a</b>				1,046,209
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b> ▶ <b>3b</b>				0





**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d**

List and describe the kind(s) of property sold (e.g., real estate, <b>(a)</b> 2-story brick warehouse, or common stock, 200 shs MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo., day, yr.)	<b>(d)</b> Date sold (mo., day, yr.)
CHARLES SCHWAB INVESTMENTS	P		
CPG ALTERNATIVE STRATEGIES FUND- LIQUIDATION	P		
TZEDEC ECONOMIC	P		
PARTNERSHIP INVESTMENTS K-1	P		
DF DENT	P		
DF DENT	P		
CAPITAL GAINS DIVIDENDS	P		

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h**

<b>(e)</b> Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	<b>(g)</b> Cost or other basis plus expense of sale	<b>(h)</b> Gain or (loss) (e) plus (f) minus (g)
389,067		222,369	166,698
215,635		248,311	-32,676
40,000		40,000	0
			72,796
29,056		63,598	-34,542
1,268,138		746,071	522,067
270,162			270,162

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l**

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			<b>(l)</b> Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
<b>(i)</b> F M V as of 12/31/69	<b>(j)</b> Adjusted basis as of 12/31/69	<b>(k)</b> Excess of col. (i) over col. (j), if any	
			166,698
			-32,676
			0
			72,796
			-34,542
			522,067
			270,162

**Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation**

<b>(a) Name and address</b>	Title, and average hours per week <b>(b)</b> devoted to position	<b>(c) Compensation (If not paid, enter -0-)</b>	<b>(d)</b> Contributions to employee benefit plans and deferred compensation	Expense account, <b>(e)</b> other allowances
LOIS H ENGLAND PO BOX 34-1107 WEST BETHESDA, MD 20827	VICE-PRESIDENT 10 00	0	0	0
RICHARD ENGLAND JR PO BOX 34-1107 WEST BETHESDA, MD 20827	TREASURER/SECRETARY 10 00	0	0	0
NONIE AKMAN PO BOX 34-1107 WEST BETHESDA, MD 20827	BOARD MEMBER 2 00	0	0	0
LARRY AKMAN PO BOX 34-1107 WEST BETHESDA, MD 20827	BOARD MEMBER 2 00	0	0	0
DIANA ENGLAND PO BOX 34-1107 WEST BETHESDA, MD 20827	BOARD MEMBER 2 00	0	0	0

**Form 990PF Part XV Line 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)				
<b>a</b> <i>Paid during the year</i>				
AMERICAN JEWISH COMMITTEE 1156 15TH STREET NW WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	GENERAL MISSION	35,000
AMERICAN JEWISH WORLD SERVICE 45 WEST 36TH STREET NEW YORK, NY 10018	NONE	PUBLIC CHARITY	GENERAL MISSION	35,000
AMERICAN JEWISH JOINT DISTRIBUTION COMMITTEE 220 E 42ND ST NEW YORK, NY 10017	NONE	PUBLIC CHARITY	GENERAL MISSION	5,000
ANTI-DEFAMATION LEAGUE 1100 CONNECTICUT AVENUE NW WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	GENERAL MISSION	30,000
ASSOCIATION OF CIVIL RIGHTS IN ISRAEL 75 NAHLAT BINYAMIN STREET JERUSALEM, JERUSALEM IS	NONE	PUBLIC CHARITY	GENERAL MISSION	20,000
<b>Total . . . . .</b> <b>3a</b>			▶	1,046,209



**Form 990PF Part XV Line 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)				
<b>a</b> <i>Paid during the year</i>				
AVODAH 45 WEST 36TH STREET 8TH FLOOR NEW YORK, NY 10018	NONE	PUBLIC CHARITY	GENERAL MISSION	10,000
BEND THE ARC 330 SEVENTH AVENUE NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL MISSION	10,000
CHESS CHALLENGE 5185 MACARTHUR BLVD 620 WASHINGTON, DC 20016	NONE	PUBLIC CHARITY	GENERAL MISSION	15,000
CHESS CHALLENGE DC 5185 MACARTHUR BLVD 620 WASHINGTON, DC 20016	NONE	PUBLIC CHARITY	GENERAL MISSION	136,709
CHILDREN'S HOSPITAL FOUNDATION 801 ROEDER RD 300 SILVER SPRING, MD 20910	NONE	PUBLIC CHARITY	GENERAL MISSION	4,500
<b>Total . . . . . ▶</b> <b>3a</b>				1,046,209

Form 990PF Part XV Line 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)				
<b>a</b> <i>Paid during the year</i>				
GREATER WASHINGTON COMMUNITY FOUNDATION 1325 G ST NW SUITE 480 WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	GENERAL MISSION	5,000
COLLEGE SUCCESS FOUNDATION - DC 1805 7TH STREET NW SUITE 500 WASHINGTON, DC 200013722	NONE	PUBLIC CHARITY	GENERAL MISSION	25,000
DC ALLIANCE OF YOUTH ADVOCATES 1220 L STREET NW SUITE 605 WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	GENERAL MISSION	25,000
DC JEWISH COMMUNITY CENTER 1529 16TH STREET NW WASHINGTON, DC 20016	NONE	PUBLIC CHARITY	GENERAL MISSION	15,000
DC PROMISE NEIGHBORHOOD 1300 44TH STREET NE ROOM 311 WASHINGTON, DC 20019	NONE	PUBLIC CHARITY	GENERAL MISSION	25,000
<b>Total</b> . . . . . ►				1,046,209
<b>3a</b>				

**Form 990PF Part XV Line 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)				
<b>a</b> <i>Paid during the year</i>				
DC SCORES 1224 M STREET NW SUITE 200 WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	GENERAL MISSION	30,000
FAIR CHANCE 2001 S STREET NW SUITE 301 WASHINGTON, DC 20009	NONE	PUBLIC CHARITY	GENERAL MISSION	25,000
GEORGETOWN HOSPITAL 3800 RESERVOIR RD NW WASHINGTON, DC 20007	NONE	PUBLIC CHARITY	GENERAL MISSION	25,000
HIGHER ACHIEVEMENT 317 8TH STREET NE WASHINGTON, DC 20002	NONE	PUBLIC CHARITY	GENERAL MISSION	95,000
HOM INC 3829 N 3RD STREET PHOENIZ, AZ 85012	NONE	PUBLIC CHARITY	GENERAL MISSION	15,000
<b>Total . . . . . ▶</b> <b>3a</b>				1,046,209

**Form 990PF Part XV Line 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)				
<b>a</b> <i>Paid during the year</i>				
JEWISH SOCIAL SERVICES AGENCY 200 WOOD HILL ROAD ROCKVILLE, MD 20850	NONE	PUBLIC CHARITY	GENERAL MISSION	15,000
JEWS UNITED FOR JUSTICE 1633 CONNECTICUT AVENUE WASHINGTON, DC 20009	NONE	PUBLIC CHARITY	GENERAL MISSION	10,000
LATIN AMERICA YOUTH CENTER 1419 COLUMBIA ROAD NW WASHINGTON, DC 20009	NONE	PUBLIC CHARITY	GENERAL MISSION	35,000
LIFE PIECES TO MASTERPIECES 5600 EADS STREET NE WASHINGTON, DC 20019	NONE	PUBLIC CHARITY	GENERAL MISSION	25,000
LITERACY LABDC READING 1003 K ST NW SUITE 500 WASHINGTON, DC 20001	NONE	PUBLIC CHARITY	GENERAL MISSION	25,000
<b>Total . . . . . ▶</b> <b>3a</b>				1,046,209

**Form 990PF Part XV Line 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)				
<b>a</b> <i>Paid during the year</i>				
MOISHE HOUSE 2121 COMMONWEALTH AVENUE CHARLOTTE, NC 28205	NONE	PUBLIC CHARITY	GENERAL MISSION	5,000
NEW ISRAEL FUND 2100 M STREET NW WASHINGTON, DC 20037	NONE	PUBLIC CHARITY	GENERAL MISSION	100,000
ONE WORLD EDUCATION 1525 NEWTON ST NW WASHINGTON, DC 20010	NONE	PUBLIC CHARITY	GENERAL MISSION	20,000
PEF ISRAEL ENDOWMENT 630 3RD AVE NEW YORK, NY 10017	NONE	PUBLIC CHARITY	GENERAL MISSION	55,000
POSSE FOUNDATION DC 1319 F ST NW 604 WASHINGTON, DC 20004	NONE	PUBLIC CHARITY	GENERAL MISSION	25,000
<b>Total . . . . .</b> ▶ <b>3a</b>				1,046,209

**Form 990PF Part XV Line 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)				
<b>a</b> <i>Paid during the year</i>				
RAISE DC 1325 G ST NW SUITE 480 WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	GENERAL MISSION	20,000
REACH PO BOX 540024 WALTHAM, MA 02454	NONE	PUBLIC CHARITY	GENERAL MISSION	25,000
RELIGIOUS ACTION CENTER OF REFORM JUDIASM 2027 MASSACHUSETTS AVENUE NW WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	GENERAL MISSION	15,000
ST ANDREW SCHOOL 350 NOXONTOWN ROAD MIDDLETOWN, DE 19709	NONE	PUBLIC CHARITY	GENERAL MISSION	3,000
SIXTH AND I HISTORIC SYNAGAGUE 600I STREET NW WASHINGTON, DC 20001	NONE	PUBLIC CHARITY	GENERAL MISSION	10,000
<b>Total . . . . . ▶</b> <b>3a</b>				1,046,209

**Form 990PF Part XV Line 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)				
<b>a</b> <i>Paid during the year</i>				
THEARC- TOWN HALL EDUCATION ARTS RECREATION CAMPUS 1901 MISSISSIPPI AVE SE WALTHAM, DC 20020	NONE	PUBLIC CHARITY	GENERAL MISSION	10,000
THE ABRAHAM FUND FOR ISRAEL 9 EAST 45TH STREET NEW YORK, NY 10017	NONE	PUBLIC CHARITY	GENERAL MISSION	30,000
WASHINGTON NATIONAL YOUTH 3675 ELY PLACE SE WASHINGTON, DC 20019	NONE	PUBLIC CHARITY	GENERAL MISSION	5,000
WASHINGTON UNIVERSITY 1 BROOKINGS DR ST LOUIS, MO 63130	NONE	PUBLIC CHARITY	GENERAL MISSION	2,000
YACHAD 1666 CONNECTICUT AVENUE NW SUITE 500 WASHINGTON, DC 20009	NONE	PUBLIC CHARITY	GENERAL MISSION	10,000
<b>Total . . . . .</b> ▶				1,046,209
<b>3a</b>				

<b>Form 990PF Part XV Line 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> <i>Paid during the year</i>				
YEDID 28 PIERRE KOENIG STREET JERUSALEM, JERUSALEM IS	NONE	PUBLIC CHARITY	GENERAL MISSION	15,000
<b>Total</b> . . . . . 				1,046,209
<b>3a</b>				



**TY 2016 Accounting Fees Schedule**

**Name:** THE LOIS AND RICHARD ENGLAND FOUNDATION  
INC C/O RICHARD ENGLAND JR

**EIN:** 52-1691418

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
ACCOUNTING FEES	9,880	3,440		3,440

**TY 2016 Investments Corporate Stock Schedule**

**Name:** THE LOIS AND RICHARD ENGLAND FOUNDATION  
INC C/O RICHARD ENGLAND JR

**EIN:** 52-1691418

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
DF DENT	2,971,130	5,536,134
LOOMIS SAYLES INVESTMENT	2,071,002	2,065,910
WASHINGTON MUTUAL INVESTOR FUND	1,859,738	2,432,352
NEW PERSPECTIVE FUND	527,142	659,965
SCHWAB #2561	5,161,481	5,477,206
SCHWAB #1810	1,362,214	1,832,618
SCHWAB CHESS #5336	1,414,981	2,206,672
CPG ALTERNATIVE STRATEGIES	1,689	5,267
CPG ACTIVIST FUND	221,690	208,338
CPG CARLYLE PRIVATE FUND	581,036	524,959
CPG BROOKFIELD FUND	112,500	112,161

## TY 2016 Other Assets Schedule

**Name:** THE LOIS AND RICHARD ENGLAND FOUNDATION  
INC C/O RICHARD ENGLAND JR

**EIN:** 52-1691418

### Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
HILLSON PARTNERS LP	995,950	905,559	949,982
TZEDEC CHALLENGE POOL	40,000	0	0
CARLYLE FUND LLC (UBS)	44,410	8,101	14,958
TIFF REAL ESTATE PARTNERS	82,729	81,235	29,731
ISRAEL BONDS	400,000	400,000	400,000
CARLYLE FUND 2	226,713	198,874	169,219
TIFF ABSOLUTE CLASS C SERIES 1	307,637	307,637	305,855
TIFF ABSOLUTE CLASS B	282,415	282,415	1,374,219

**TY 2016 Other Expenses Schedule**

**Name:** THE LOIS AND RICHARD ENGLAND FOUNDATION  
 INC C/O RICHARD ENGLAND JR

**EIN:** 52-1691418

**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK CHARGES	336	281		0
SUBSCRIPTIONS	247	0		247
MEMBERSHIP DUES	5,350	0		5,350
POSTAGE	395	0		395
SUPPLIES	3,894	0		3,894
TELEPHONE, FAX, DSL LINES	2,442	0		2,442
PARKING	3,770	0		3,770
INSURANCE	911	0		911
COMPUTER REPAIRS AND MAINT	569	0		569
PARTNERSHIP INVESTMENT-OTHER LOSSES	5,308	5,308		0

**TY 2016 Other Income Schedule**

**Name:** THE LOIS AND RICHARD ENGLAND FOUNDATION  
INC C/O RICHARD ENGLAND JR

**EIN:** 52-1691418

**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP INVESTMENT INCOME-UBI	16,576	0	16,576
SUBLEASE INCOME	4,591	4,591	4,591

**TY 2016 Other Professional Fees Schedule**

**Name:** THE LOIS AND RICHARD ENGLAND FOUNDATION  
INC C/O RICHARD ENGLAND JR

**EIN:** 52-1691418

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
INVESTMENT MANAGEMENT FEES	156,792	156,792		0
CONSULTING FEE	215,890	0		215,890
OTHER PROFESSIONAL FEES	1,989	0		1,989

**TY 2016 Taxes Schedule**

**Name:** THE LOIS AND RICHARD ENGLAND FOUNDATION  
INC C/O RICHARD ENGLAND JR

**EIN:** 52-1691418

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
FEDERAL EXCISE TAXES	87,848	0		0
FOREIGN TAXES	9,020	9,020		0