

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.**  
 ▶ **Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.**

OMB No 1545-0052  
**2018**  
**Open to Public Inspection**

**For calendar year 2018, or tax year beginning 01-01-2018, and ending 12-31-2018**

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) ▶ \$ <u>60,439,067</u>	<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis)</i>	<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> <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</i>		<b>(a)</b> Revenue and expenses per books	<b>(b)</b> Net investment income	<b>(c)</b> Adjusted net income	<b>(d)</b> Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)	41,150,563			
	<b>2</b> Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	<b>3</b> Interest on savings and temporary cash investments	17,643	17,643		
	<b>4</b> Dividends and interest from securities	796,648	796,648		
	<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	1,892,453			
	<b>b</b> Gross sales price for all assets on line 6a	4,430,288			
	<b>7</b> Capital gain net income (from Part IV, line 2)		1,892,453		
	<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)	36,752	21,752			
<b>12 Total.</b> Add lines 1 through 11	43,894,059	2,728,496			
<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)	31,223	0		31,223
	<b>b</b> Accounting fees (attach schedule)	9,880	3,940		4,940
	<b>c</b> Other professional fees (attach schedule)	436,047	257,482		178,565
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions)	27,508	12,508		0
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy	30,045	0		30,045
	<b>21</b> Travel, conferences, and meetings	9,429	0		9,429
	<b>22</b> Printing and publications				
	<b>23</b> Other expenses (attach schedule)	18,454	390		16,466
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	562,586	274,320		270,668
	<b>25</b> Contributions, gifts, grants paid	2,077,855			2,077,855
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	2,640,441	274,320		2,348,523	
<b>27</b> Subtract line 26 from line 12					
<b>a Excess of revenue over expenses and disbursements</b>	41,253,618				
<b>b Net investment income</b> (if negative, enter -0-)		2,454,176			
<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 . . . . .	4,986		
	<b>2</b> Savings and temporary cash investments . . . . .	595,092	133,071	133,071
	<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) ▶ _____ 1,500,000 Less allowance for doubtful accounts ▶ _____ 0	0	1,500,000	1,500,000
	<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) . . . . .	16,317,095	54,165,912	53,340,087
	<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) . . . . .	2,222,036	4,593,844	5,465,909
	<b>14</b> Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)				
<b>16 Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	19,139,209	60,392,827	60,439,067	
<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	19,139,209	60,392,827		
<b>30 Total net assets or fund balances</b> (see instructions) . . . . .	19,139,209	60,392,827		
<b>31 Total liabilities and net assets/fund balances</b> (see instructions) .	19,139,209	60,392,827		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<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>	19,139,209
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	41,253,618
<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>	60,392,827
<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>	60,392,827

**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)
<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	1,892,453
<b>3</b> 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	

**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))
2017	1,296,426	26,282,639	0.049326
2016	1,306,696	25,142,065	0.051973
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

<b>2</b> Total of line 1, column (d)	2	0.343117
<b>3</b> Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.068623
<b>4</b> Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	38,386,645
<b>5</b> Multiply line 4 by line 3	5	2,634,207
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	6	24,542
<b>7</b> Add lines 5 and 6	7	2,658,749
<b>8</b> Enter qualifying distributions from Part XII, line 4	8	3,848,523

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 calculations. Includes fields for exempt foundations, domestic foundations, tax under section 511, subtitle A tax, and total tax due. Total tax due is 8,845.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political campaigns, political expenditures, and state reporting. Includes Yes/No columns.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-14 regarding controlled entities, distributions, public inspection requirements, and books in care.

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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 foreign countries.

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)

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

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

**1** List all officers, directors, trustees, 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
RICHARD ENGLAND JR PO BOX 34-1107 WEST BETHESDA, MD 20827	PRESIDENT 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

**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
NONE				

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

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

<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</b> number of others receiving over \$50,000 for professional services. . . . . ▶		0

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
<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> PERFORMANCE ARTS PROGRAM SPONSORING WASHINGTON BALLET	1,500,000
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3 . . . . . ▶	1,500,000

**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>	38,133,612
<b>b</b>	Average of monthly cash balances.	<b>1b</b>	837,601
<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>	38,971,213
<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>	38,971,213
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	<b>4</b>	584,568
<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>	38,386,645
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5.	<b>6</b>	1,919,332

**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>	1,919,332
<b>2a</b>	Tax on investment income for 2018 from Part VI, line 5.	<b>2a</b>	24,542
<b>b</b>	Income tax for 2018 (This does not include the tax from Part VI).	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b.	<b>2c</b>	24,542
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	1,894,790
<b>4</b>	Recoveries of amounts treated as qualifying distributions.	<b>4</b>	15,000
<b>5</b>	Add lines 3 and 4.	<b>5</b>	1,909,790
<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>	1,909,790

**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>	2,348,523
<b>b</b>	Program-related investments—total from Part IX-B.	<b>1b</b>	1,500,000
<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>	3,848,523
<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>	24,542
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	3,823,981

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



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

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
<b>1</b> Distributable amount for 2018 from Part XI, line 7				1,909,790
<b>2</b> Undistributed income, if any, as of the end of 2018				
<b>a</b> Enter amount for 2017 only. . . . .			0	
<b>b</b> Total for prior years 20___, 20___, 20___		0		
<b>3</b> Excess distributions carryover, if any, to 2018				
<b>a</b> From 2013. . . . .	1,848,856			
<b>b</b> From 2014. . . . .	297,874			
<b>c</b> From 2015. . . . .				
<b>d</b> From 2016. . . . .	75,643			
<b>e</b> From 2017. . . . .	11,988			
<b>f</b> Total of lines 3a through e. . . . .	2,234,361			
<b>4</b> Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>3,848,523</u>				
<b>a</b> Applied to 2017, 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 2018 distributable amount. . . . .				1,909,790
<b>e</b> Remaining amount distributed out of corpus	1,938,733			
<b>5</b> Excess distributions carryover applied to 2018 (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	4,173,094			
<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 2017 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019 . . . . .				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 2013 not applied on line 5 or line 7 (see instructions). . . . .	1,848,856			
<b>9</b> Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a . . . . .	2,324,238			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2014. . . . .	297,874			
<b>b</b> Excess from 2015. . . . .				
<b>c</b> Excess from 2016. . . . .	75,643			
<b>d</b> Excess from 2017. . . . .	11,988			
<b>e</b> Excess from 2018. . . . .	1,938,733			

**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 2018, 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) 2018	(b) 2017	(c) 2016	(d) 2015	
<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 . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon					
<b>a</b> "Assets" alternative test—enter					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .					
<b>c</b> "Support" alternative test—enter					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> 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) )

**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. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.

**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>				
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b> ▶ <b>3b</b>				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Table with 5 main columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include items like Program service revenue, Fees and contracts from government agencies, Dividends and interest from securities, etc.

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Table with 2 columns: Line No. and Explanation. Row 11A: RETURN OF PRIOR YEAR GRANT GIVEN. Subsequent rows are blank for explanation.

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

Part XVII

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

Table with 3 columns: Question, Yes, No. Rows include 1a(1) Cash, 1a(2) Other assets, 1b(1) Sales of assets, 1b(2) Purchases of assets, 1b(3) Rental of facilities, 1b(4) Reimbursement arrangements, 1b(5) Loans or loan guarantees, 1b(6) Performance of services, and 1c Sharing of facilities.

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

Schedule table with 4 columns: (a) Line No, (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements.

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? [ ] Yes [x] No

b If "Yes," complete the following schedule

Schedule table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship.

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Sign Here

Signature area with fields for Signature of officer or trustee, Date (2019-11-11), and Title. Includes a box for 'May the IRS discuss this return with the preparer shown below' with Yes/No options.

Paid Preparer Use Only

Preparer information section with fields for Print/Type preparer's name (FRANK H SMITH), Preparer's Signature, Date, Check if self-employed, PTIN (P00639053), Firm's name (MARCUM LLP), Firm's EIN (11-1986323), Firm's address (1899 L STREET NW 900 WASHINGTON, DC 20036), and Phone no (301) 979-6000.

**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, (a) 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 PARTNERSHIP INVESTMENT K-1	P		
1 CHARLES SCHWAB # 2561	P		
CHARLES SCHWAB # 1810	P		
RAYMOND JAMES	P		
DF DENT	P		
TWEEDY BROWNE GLOBAL	D		
CAPITAL GAINS DIVIDENDS	P		

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

(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)
			-24,099
552,064		574,642	-22,578
608,529		430,752	177,777
369,342		419,776	-50,434
471,845		242,688	229,157
800,000		845,878	-45,878
1,628,508			1,628,508

**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			(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	
			-24,099
			-22,578
			177,777
			-50,434
			229,157
			-45,878
			1,628,508

**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		PUBLIC CHARITY	GENERAL MISSION	15,000
AMERICAN JEWISH COMMITTEE 1156 15TH STREET NW WASHINGTON, DC 20005		PUBLIC CHARITY	COMBAT ANTI-SEMITISM	40,000
AMERICAN JEWISH WORLD SERVICE 45 WEST 36TH STREET NEW YORK, NY 10018		PUBLIC CHARITY	GENERAL MISSION	14,400
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
ANTI-DEFAMATION LEAGUE 1100 CONNECTICUT AVENUE NW WASHINGTON, DC 20036		PUBLIC CHARITY	GENERAL MISSION	60,000
ARENA STAGE1101 6TH ST SW WASHINGTON, DC 20024		PUBLIC CHARITY	GENERAL MISSION	5,000
AVODAH 1886 12TH STREET NW 3RD FLOOR WASHINGTON, DC 20009		PUBLIC CHARITY	GENERAL MISSION	15,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855



**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>				
ATLAS PERFORMAING ARTS CENTER 1333 H ST NE WASHINGTON, DC 20002		PUBLIC CHARITY	GENERAL MISSION	1,000
BELL MULTICULTURAL INTERNSHIP PROGRAM 3101 16TH STREET NW WASHINGTON, DC 20010		PUBLIC CHARITY	GENERAL MISSION	75,000
BEND THE ARC330 SEVENTH AVENUE NEW YORK, NY 10001		PUBLIC CHARITY	GENERAL MISSION	15,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
BETHESDA CHEVY CHASE RESCUE SQUAD 5020 BATTERY LN BETHESDA, MD 20814		PUBLIC CHARITY	GENERAL MISSION	1,000
BREAD FOR THE CITY 1525 7TH STREET NW WASHINGTON, DC 20001		PUBLIC CHARITY	GENERAL MISSION	10,000
BUILDING BRIDGES ACROOS THE RIVER 1901 MISSISSIPPI AVENUE SE SUITE 101 WASHINGTON, DC 20020		PUBLIC CHARITY	GENERAL MISSION	101,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
CAPITAL AREA IMMIGRANTS RIGHTS COALITION 1612 K ST NW WASHINGTON, DC 20006		PUBLIC CHARITY	GENERAL MISSION	25,000
CATALOGUE FOR PHILANTHROPY 10 G ST WASHINGTON, DC 20002		PUBLIC CHARITY	GENERAL MISSION	5,000
CENTER FOR INSPIRED TEACHING 1436 U ST NW WASHINGTON, DC 20009		PUBLIC CHARITY	GENERAL MISSION	15,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
CHILDREN'S HOSPITAL FOUNDATION 801 ROEDER RD STE 650 SILVER SPRING, MD 20910		PUBLIC CHARITY	GENERAL MISSION	10,000
CITY DANCE 4000 ALBEMARLE ST NW SUITE 304 WASHINGTON, DC 20016		PUBLIC CHARITY	GENERAL MISSION	2,000
COMMUNITY OF HOPE 4 ATLANTIC ST NW WASHINGTON, DC 20032		PUBLIC CHARITY	GENERAL MISSION	15,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
CRADLE OF HOPE ADOPTION CENTER 8630 FENTON ST SILVER SPRING, MD 20910		PUBLIC CHARITY	GENERAL MISSION	3,000
DANA FABER CANCER INSTITUTE 450 BROOKLINE AVE BOSTON, MA 02215		PUBLIC CHARITY	GENERAL MISSION	25,000
DC AYA1220 L STREET NW WASHINGTON, DC 20005		PUBLIC CHARITY	YOUTH ADOVACY FOR ACTION FORUM	30,000
<b>Total . . . . .</b>				<b>2,077,855</b>

▶ **3a**

**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 CENTRAL KITCHEN 425 2ND ST NW WASHINGTON, DC 20001		PUBLIC CHARITY	GENERAL MISSION	20,000
DC COLLEGE SUCESS FOUNDATION 1805 7TH STREET NW SUITE 500 WASHINGTON, DC 20003		PUBLIC CHARITY	GENERAL MISSION	50,000
DC EDUCATION FUND 125 BARCLAY ST STE 9 NEW YORK, NY 10007		PUBLIC CHARITY	GENERAL MISSION	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	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
<i>a Paid during the year</i>				
DC PUBLIC EDUCATION FUND 3407 14TH ST NW WASHINGTON, DC 20010		PUBLIC CHARITY	GENERAL MISSION	5,000
DC SCORES 1224 M STREET NW SUITE 200 WASHINGTON, DC 20005		PUBLIC CHARITY	GENERAL MISSION	35,000
EDUCATION FORWARD DC 1805 7TH ST NW WASHINGTON, DC 20001		PUBLIC CHARITY	GENERAL MISSION	50,000
<b>Total . . . . . ▶ 3a</b>				2,077,855

**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>				
GOODWILL EXCEL CENTER 1015 NORWOOD PARK BLVD AUSTIN, TX 78753		PUBLIC CHARITY	GENERAL MISSION	25,000
HEBREW HOME OF GREATER WASHINGTON 6111 MONTROSE RD NORTH BETHESDA, MD 20852		PUBLIC CHARITY	GENERAL MISSION	3,000
HIGHER ACHIEVEMENT 317 8TH STREET NE WASHINGTON, DC 20002		PUBLIC CHARITY	GENERAL MISSION	65,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855



**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>				
IMAGINATION STAGE4908 AUBURN AVE BETHESDA, MD 20814		PUBLIC CHARITY	GENERAL MISSION	5,000
IONA175 NORTH AVE NEW ROCHELLE, NY 10801		PUBLIC CHARITY	GENERAL MISSION	100,000
JEWISH SOCIAL SERVICES 200 WOOD HILL ROAD ROCKVILLE, MD 20850		PUBLIC CHARITY	GENERAL MISSION	55,000
<b>Total . . . . . ▶ 3a</b>				2,077,855

**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>				
JEWS UNITED FOR JUSTICE 1633 CONNECTICUT AVENUE NW WASHINGTON, DC 20009		PUBLIC CHARITY	GENERAL MISSION	15,000
JOHNS HOPKINS PSYCHIATRY 600 NORTH WOLFE ST BALTIMORE, MD 21287		PUBLIC CHARITY	GENERAL MISSION	5,000
JUNTOS2029 SOUTH 8TH ST PHILADELPHIA, PA 19148		PUBLIC CHARITY	GENERAL MISSION	2,500
<b>Total . . . . .</b>				<b>2,077,855</b>

**▶ 3a**

**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>				
LATIN AMERICAN YOUTH CENTER 1419 COLUMBIA ROAD NW WASHINGTON, DC 20009		PUBLIC CHARITY	GENERAL MISSION	105,000
LATIN AMERICAN YOUTH CENTER 1419 COLUMBIA ROAD NW WASHINGTON, DC 20009		PUBLIC CHARITY	GENERAL MISSION	7,500
LITERACY LABDC READING CORPS 1003 K ST NW STE 500 WASHINGTON, DC 20001		PUBLIC CHARITY	GENERAL MISSION	30,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
LOWELL SCHOOL 1640 KALMIA RD NW WASHINGTON, DC 20012			GENERAL MISSION	1,000
MARTHA'S TABLE 2375 ELVANS RD SE WASHINGTON, DC 20020			GENERAL MISSION	15,000
MARY'S CENTER 344 UNIVERSITY BLVD WEST SILVER SPRING, MD 20901			GENERAL MISSION	5,000
<b>Total . . . . . ▶ 3a</b>				2,077,855

**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>				
MCLEAN SCHOOL OF MARYLAND 8224 LOCHINVER LN POTOMAC, MD 20854		PUBLIC CHARITY	GENERAL MISSION	1,000
MEDSTAR GEOGETOWN HOSPITALCENTER FOR INNOVATION 2115 WISCONSIN AVENUE NW WASHINGTON, DC 20007		PUBLIC CHARITY	GENERAL MISSION	25,000
MICHAEL J FOX FOUNDATION PO BOX 4777 NEW YORK, NY 10163		PUBLIC CHARITY	GENERAL MISSION	105,000
<b>Total . . . . .</b>				<b>2,077,855</b>

▶ **3a**

**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>				
MONTGOMERY HOSPICE 1355 PICCARD DR STE 100 ROCKVILLE, MD 20850		PUBLIC CHARITY	GENERAL MISSION	60,000
MOSIAC THEATRE 2911 DISTRICT AVE STE 200 FAIRFAX, VA 22031		PUBLIC CHARITY	GENERAL MISSION	2,500
MULTICULTURAL CAREER INTERN PROGRAM-BELL 3101 16TH ST NW WASHINGTON, DC 20010		PUBLIC CHARITY	GENERAL MISSION	25,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
NATIONAL GAUCHER FOUNDATION 5410 EDSON LN 220 ROCKVILLE, MD 20852		PUBLIC CHARITY	GENERAL MISSION	1,000
NATIONAL MUSEUM AFRICAN AMERICAN HISTORY 1400 CONSTITUTION AVE NW WASHINGTON, DC 20001		PUBLIC CHARITY	GENERAL MISSION	5,000
NEW ISRAEL FUNDANU 330 SEVENTH AVENUE 11TH FLOOR NEW YORK, NY 10001		PUBLIC CHARITY	GENERAL MISSION	10,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
NEW ISRAEL FUNDASSOCIATION OF CIVIL RIGHTSIN ISRAEL 330 SEVENTH AVENUE 11TH FLOOR NEW YORK, NY 10001		PUBLIC CHARITY	GENERAL MISSION	18,000
NEW ISRAEL FUNDEEW 330 SEVENTH AVENUE 11TH FLOOR NEW YORK, NY 10001		PUBLIC CHARITY	GENERAL MISSION	9,000
NEW ISRAEL FUNDIRAC 330 SEVENTH AVENUE 11TH FLOOR NEW YORK, NY 10001		PUBLIC CHARITY	GENERAL MISSION	35,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855



**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>				
NEW ISRAEL FUND NEW ISRAEL FUND 330 SEVENTH AVENUE 11TH FLOOR NEW YORK, NY 10001		PUBLIC CHARITY	GENERAL MISSION	27,000
NEW ISRAEL FUND T Sofen 330 SEVENTH AVENUE 11TH FLOOR NEW YORK, NY 10001		PUBLIC CHARITY	GENERAL MISSION	9,000
ONE WORLD EDUCATION 1800 KENYON STREET NW WASHINGTON, DC 20010		PUBLIC CHARITY	GENERAL MISSION	25,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
PEF ENDOWMENT FUNDJASMINE 630 THIRD AVENUE SUITE 1501 NEW YORK, NY 10017		PUBLIC CHARITY	GENERAL MISSION	27,000
PEF ENDOWMENT FUNDSIKKUY 630 THIRD AVENUE SUITE 1501 NEW YORK, NY 10017		PUBLIC CHARITY	GENERAL MISSION	9,000
PEF ENDOWMENT FUNDKAV MASHVE 630 THIRD AVENUE SUITE 1501 NEW YORK, NY 10017		PUBLIC CHARITY	GENERAL MISSION	9,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
PHILLIPS COLLECTION 1600 21ST ST NW WASHINGTON, DC 20009		PUBLIC CHARITY	GENERAL MISSION	5,000
PLANNED PARENTHOOD FEDERATION OF AMERICA 1225 4TH ST NE WASHINGTON, DC 20002		PUBLIC CHARITY	GENERAL MISSION	5,000
PLANNED PARENTHOOD-METRO WASHINGTON 1225 4TH ST NE WASHINGTON, DC 20002		PUBLIC CHARITY	GENERAL MISSION	50,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
POSSE FOUNDATION 14 WALL ST STE 8A NEW YORK, NY 10005		PUBLIC CHARITY	GENERAL MISSION	30,000
REACH INC729 8TH STREET SE WASHINGTON, DC 20003		PUBLIC CHARITY	GENERAL MISSION	30,000
RELIGIOUS ACTION FOR REFORM JUDISM 2027 MASS AVENUE NW WASHINGTON, DC 20036		PUBLIC CHARITY	GENERAL MISSION	15,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
SIDWELL FRIENDS SCHOOL 3825 WISCONSIN AVE NW WASHINGTON, DC 20016		PUBLIC CHARITY	GENERAL MISSION	5,000
SITAR ARTS CENTER 1700 KALORAMA RD NW STE 101 WASHINGTON, DC 20009		PUBLIC CHARITY	GENERAL MISSION	5,000
SIXTH & I1816 12TH STREET NW WASHINGTON, DC 20009		PUBLIC CHARITY	GENERAL MISSION	15,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
SMITHSONIAN INSTITUTION 1000 JEFFERSON DE SW WASHINGTON, DC 20560		PUBLIC CHARITY	GENERAL MISSION	5,000
STATESMEN COLLEGE PREP ACADEMY 4250 MASSACHUSETTS AVE SE WASHINGTON, DC 20019		PUBLIC CHARITY	GENERAL MISSION	25,000
STUDIO THEATRE 1501 14TH ST NW 3RD FL WASHINGTON, DC 20005		PUBLIC CHARITY	GENERAL MISSION	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
THE ABRAHAM FUND 9 EAST 45TH STREET NEW YORK, NY 10001		PUBLIC CHARITY	GENERAL MISSION	18,000
THE BARKER ADOPTION FOUNDATION 7979 OLD GEORGETOWN ROAD 1ST FLOOR BETHESDA, MD 20814		PUBLIC CHARITY	GENERAL MISSION	35,000
THE COMMUNITY FOUNDATION 900 WALL WHITMAN RD STE 205 MELVILLE, NY 11747		PUBLIC CHARITY	GENERAL MISSION	5,000
<b>Total . . . . .</b>				<b>2,077,855</b>

▶ **3a**

**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>				
THE LEUKEMIA & LYMPHOMA SOCIETY 3 HUNTINGTON QUADRANGLE 2ND FL STE 202 MELVILLE, NY 11747		PUBLIC CHARITY	GENERAL MISSION	20,000
THE REFUGEE & IMMIGRANT CENTER 1305 N FLORES ST SAN ANTONIO, TX 78212		PUBLIC CHARITY	GENERAL MISSION	25,000
THE ZIMS FOUNDATION 2129 GENERAL BOOTH BLVD 103-234 VIRGINIA BEACH, VA 23454		PUBLIC CHARITY	GENERAL MISSION	1,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855



**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>				
TULANE UNIVERSITY 6823 ST CHARLES AVE NEW ORLEANS, LA 70118		PUBLIC CHARITY	GENERAL MISSION	2,000
TZEDEC 4340 CONNECTICUT AVENUE NW WASHINGTON, DC 20008		PUBLIC CHARITY	GENERAL MISSION	15,000
UNIVERSITY OF MARYLAND FUND FOR MEDICINE 655 W BALTIMORE STREET BALTIMORE, MD 21201		PUBLIC CHARITY	GENERAL MISSION	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
URBAN ALLIANCE 2 ROOSEVELT AVE STE 102 SYOSSET, NY 11791		PUBLIC CHARITY	GENERAL MISSION	5,000
US AGAINST ALZHEIMERS 2 WISCONSIN CIRCLE SUITE 700 CHEVY CHASE, MD 20815		PUBLIC CHARITY	GENERAL MISSION	20,000
US HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBURG PL SW WASHINGTON, DC 20024		PUBLIC CHARITY	GENERAL MISSION	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
WAMU4401 CONNECTICUT AVE NW WASHINGTON, DC 20008		PUBLIC CHARITY	GENERAL MISSION	1,000
WASHINGTON DC JCC 1529 16TH STREET NW WASHINGTON, DC 20036		PUBLIC CHARITY	CAPITAL CAMPAIGN	15,000
WASHINGTON JESUIT ACADEMY 900 VARNUM ST NE WASHINGTON, DC 20017		PUBLIC CHARITY	GENERAL MISSION	18,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
WASHINGTON NATIONAL YOUTH BASEBALL 3675 ELY PLACE SE WASHINGTON, DC 20019		PUBLIC CHARITY	GENERAL MISSION	5,500
WASHINGTON REGIONAL ASSOCIATION OF GRANTMAKERS 1400 16TH STREET NW SUITE 740 WASHINGTON, DC 20036		PUBLIC CHARITY	CHILDREN, YOUTH AND FAMILIES WORKING GROUP	1,000
WORLD UNION FOR PROGRESSIVE JUDAISM 633 THIRD AVE 7TH FLOOR NEW YORK, NY 10017		PUBLIC CHARITY	GENERAL MISSION	3,000
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**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>				
YACHAD8720 GEORGIA AVENUE SILVER SPRING, MD 20910		PUBLIC CHARITY	GENERAL MISSION	15,000
YEDID492 CEDAR LANE 335 TEANECK, NJ 07666		PUBLIC CHARITY	GENERAL MISSION	14,400
AIPAC MID-ATLANTIC REGIONAL OFFICE PO BOX 1904 BALTIMORE, MD 21203		PUBLIC CHARITY	VARIOUS STOCKS DONATED THROUGH DAF	165,055
<b>Total . . . . .</b> ▶ <b>3a</b>				2,077,855

**TY 2018 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	3,940		4,940

**TY 2018 Investments Corporate Stock Schedule**

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

**EIN:** 52-1691418

**Investments Corporation Stock Schedule**

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
DF DENT	3,241,973	6,809,683
LOOMIS SAYLES INVESTMENT	2,237,767	2,193,156
SCHWAB #2561	25,909,117	23,135,324
SCHWAB #1810	1,256,667	1,485,214
CPG ACTIVIST FUND	220,156	208,044
CPG CARLYLE PRIVATE FUND	667,462	625,803
CPG BROOKFIELD FUND	199,244	219,269
TWEEDY BROWNE GLOBAL VALUE	8,774,939	7,548,522
CARLYLE FUND LLC (HELD IN UBS)	6,955	12,466
CARLYLE FUND II (HELD IN UBS)	87,164	92,376
RAYMOND JAMES/ALEX BROWN	11,564,468	11,010,230

**TY 2018 Investments - Other Schedule**

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

**EIN:** 52-1691418

**Investments Other Schedule 2**

<b>Category/ Item</b>	<b>Listed at Cost or FMV</b>	<b>Book Value</b>	<b>End of Year Fair Market Value</b>
AVISTONE NORTHWEST LLC	AT COST	91,557	91,557
NEXTGEN VENTURES FUND	AT COST	48,364	48,364
SWAN & LEGEND FUND 4	AT COST	307,976	307,976
FEG PRIVATE OPP FUND	AT COST	90,000	90,000
PICKARD FUND II	AT COST	127,972	127,972
NUVEEN REAL ESTATE	AT COST	359,812	359,812
HILLSON PARTNERS LP	AT COST	2,455,725	2,295,643
TIFF REAL ESTATE PARTNERS	AT COST	75,153	20,595
ISRAEL BONDS	AT COST	450,000	450,000
TIFF ABSOLUTE CL C SERIES I	AT COST	307,637	262,866
TIFF ABSOLUTE CL B	AT COST	182,415	1,314,794
AVISTONE CITYGATE	AT COST	97,233	96,330



# TY 2018 Legal Fees Schedule

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

**EIN:** 52-1691418

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	31,223	0		31,223

**TY 2018 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	390	390		0
POSTAGE	276	0		276
SUPPLIES	3,620	0		3,620
TELEPHONE, FAX, DSL LINES	2,311	0		2,311
PARKING	3,990	0		3,990
INSURANCE	919	0		919
MEMBERSHIP DUES	5,350	0		5,350
NON DEDUCTIBLE EXPENSES	1,318	0		0
PARTNERSHIP INVESTMENTS UBI	280	0		0

**TY 2018 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	12,068	12,068	12,068
SUBLEASE INCOME	9,684	9,684	9,684
RETURN OF GRANT GIVEN	15,000		15,000

**TY 2018 Other Notes/Loans Receivable Short Schedule**

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

**EIN:** 52-1691418

<b>Name of 501(c)(3) Organization</b>	<b>Balance Due</b>
WASHINGTON BALLET	1,500,000

**TY 2018 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	257,482	257,482		0
CONSULTING FEE	178,565	0		178,565

**TY 2018 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	15,000	0		0
FOREIGN TAXES	12,508	12,508		0

**Schedule B**  
(Form 990, 990-EZ,  
or 990-PF)  
Department of the Treasury  
Internal Revenue Service

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

OMB No 1545-0047  
**2018**

**Name of the organization**  
THE LOIS AND RICHARD ENGLAND FOUNDATION  
INC C/O RICHARD ENGLAND JR

**Employer identification number**  
52-1691418

**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 foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.  
**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other 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<sup>1</sup> 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 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

<b>Name of organization</b> THE LOIS AND RICHARD ENGLAND FOUNDATION INC C/O RICHARD ENGLAND JR	<b>Employer identification number</b> 52-1691418
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**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	ESTATE OF MRS LOIS ENGLAND PO BOX 34-1107 BETHESDA, MD 20827	\$ 41,150,563	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> <small>(Complete Part II for noncash contributions )</small>
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions )</small>
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions )</small>
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions )</small>
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions )</small>
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions )</small>
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions )</small>
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions )</small>
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions )</small>



<b>Name of organization</b> THE LOIS AND RICHARD ENGLAND FOUNDATION INC C/O RICHARD ENGLAND JR	<b>Employer identification number</b> 52-1691418
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<b>Part II Noncash Property</b>			
<small>(See instructions) Use duplicate copies of Part II if additional space is needed</small>			
<b>(a)</b> <b>No. from Part I</b>	<b>(b)</b> <b>Description of noncash property given</b>	<b>(c)</b> <b>FMV (or estimate)</b> <small>(See instructions)</small>	<b>(d)</b> <b>Date received</b>
1	DONATION OF CASH \$4,198,054 AND INVESTMENTS AT COST \$36,952,509	\$ 36,952,509	2018-01-28
<b>(a)</b> <b>No. from Part I</b>	<b>(b)</b> <b>Description of noncash property given</b>	<b>(c)</b> <b>FMV (or estimate)</b> <small>(See instructions)</small>	<b>(d)</b> <b>Date received</b>
	_____	\$ _____	_____
<b>(a)</b> <b>No. from Part I</b>	<b>(b)</b> <b>Description of noncash property given</b>	<b>(c)</b> <b>FMV (or estimate)</b> <small>(See instructions)</small>	<b>(d)</b> <b>Date received</b>
	_____	\$ _____	_____
<b>(a)</b> <b>No. from Part I</b>	<b>(b)</b> <b>Description of noncash property given</b>	<b>(c)</b> <b>FMV (or estimate)</b> <small>(See instructions)</small>	<b>(d)</b> <b>Date received</b>
	_____	\$ _____	_____
<b>(a)</b> <b>No. from Part I</b>	<b>(b)</b> <b>Description of noncash property given</b>	<b>(c)</b> <b>FMV (or estimate)</b> <small>(See instructions)</small>	<b>(d)</b> <b>Date received</b>
	_____	\$ _____	_____
<b>(a)</b> <b>No. from Part I</b>	<b>(b)</b> <b>Description of noncash property given</b>	<b>(c)</b> <b>FMV (or estimate)</b> <small>(See instructions)</small>	<b>(d)</b> <b>Date received</b>
	_____	\$ _____	_____
<b>(a)</b> <b>No. from Part I</b>	<b>(b)</b> <b>Description of noncash property given</b>	<b>(c)</b> <b>FMV (or estimate)</b> <small>(See instructions)</small>	<b>(d)</b> <b>Date received</b>
	_____	\$ _____	_____

<b>Name of organization</b> THE LOIS AND RICHARD ENGLAND FOUNDATION INC C/O RICHARD ENGLAND JR	<b>Employer identification number</b> 52-1691418
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**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this 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
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

<hr/> <hr/>	(e) Transfer of gift
Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>

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

<hr/> <hr/>	(e) Transfer of gift
Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>

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

<hr/> <hr/>	(e) Transfer of gift
Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>

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

<hr/> <hr/>	(e) Transfer of gift
Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>