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

# EXTENDED TO NOVEMBER 15, 2019 Return of Private Foundation

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

Do not enter social security numbers on this form as it may be made public

Go to www.irs gov/Form990PF for instructions and the latest information.

2018

For	alen	dar year 2018 or tax year beginning		, and ending		
Nar	ne of	foundation		A Employer identification	number	
		DENBERG FOUNDATION			72-6022665	
		nd street (or P O box number if mail is not delivered to street	address)	Room/suite	<b>B</b> Telephone number	
		METAIRIE ROAD		504-847-60	78	
		own, state or province, country, and ZIP or foreign p	ostal code		C If exemption application is p	ending, check here
		AIRIE, LA 70005-4308	- <del>  </del>			
G C	heck	all that apply: Initial return		ormer public charity	D 1. Foreign organizations	, check here
		Final return	Amended return		2. Foreign organizations me	eting the 85% test.
		Address change	Name change		Foreign organizations me check here and attach co	mputation
H C	٦.	type of organization: X Section 501(c)(3) ex		M	E If private foundation state	
			Other taxable private founda		under section 507(b)(1)	• • •
		arket value of all assets at end of year J Accounting	*	Accrual	F If the foundation is in a f	
(II		Part II, col. (c), line 16) OI	ther (specify)	<u>c)</u>	under section 507(b)(1)	(B), cneck nere
	rt I				4 3 4 4 - 4 4 - 4	(d) Disbursements
	111	(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) )	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc., received		,		
1	2	Check X If the foundation is not required to attach Sch. B Interest on savings and temporary				
λ	3	cash investments	410.	410.		STATEMENT 1
1	4	Dividends and interest from securities	379,347.	379,347.		STATEMENT 2
	5a	Gross rents				
	þ	Net rental income or (loss)	0 000 550			
ę	6a	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all	2,929,553.		RECEIV	
Ē	b	assets on line 6a		0 000 550		
Revenue	7 Capital gain net income (from Part IV, line 2)			2,929,553.		2019
_	8	Net short-term capital gain			NOV 2 2	<u></u>
	9	Income modifications Gross sales less returns				<u> </u>
	10a	and allowances			OGDEN	<del>, UT</del>
		Less Cost of goods sold				•
	11	Gross profit or (loss) Other income	24,741.	780.	0	STATEMENT 3
	12	Total Add lines 1 through 11	3,334,051.	3,310,090.	0.	DIAILMENT 5
	13	Compensation of officers, directors, trustees, etc	120,000.	30,000.	0.	90,000.
	14	Other employee salaries and wages		557555		30,000
	15	Pension plans, employee benefits		,		· · · · · · · · · · · · · · · · · · ·
Ses		Legal fees				
ens	b	Accounting fees STMT 4	8,950.	2,238.	0.	6,712.
Ä	C	Other professional fees		<u>,                                      </u>		<u> </u>
Ş.	17	Interest				
(F)	18	Taxes				
NST NST	19	Depreciation and depletion				
4	20	Occupancy				
and Admilistrative Expens	21	Travel, conferences, and meetings	20,679.	5,170.	0.	15,509.
Ğ	22	Printing and publications	400-0-0	455 465		44.55
Θρ <del>ὸ</del> ἐἀτίῆg	23	Other expenses STMT 5	188,879.	177,029.	0.	11,850.
Te.	24	Total operating and administrative	330 500	014 427		104 054
Θρ		expenses Add lines 13 through 23	338,508.	214,437.	0.	124,071. 2,748,037.
~	25	Contributions, gifts, grants paid	2,748,037.			<u> </u>
2(	26	Total expenses and disbursements Add lines 24 and 25	3 006 646	21/ /27	0.	2 072 100
207,0	27	Subtract line 26 from line 12:	3,086,545.	214,437.	0.	2,872,108.
		Excess of revenue over expenses and discursements	247,506.			
		Net investment income (if negative, enter -0-)	21,7500	3,095,653.		
		Adjusted net income (if negative, enter -0-)			0.	

25,464,873.

Form 990-PF (2018)

Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

72-6022655 Page 3 Form 99@-PF (2018) WOLDENBERG FOUNDATION Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (a) List and describe the kind(s) of property sold (for example, real estate, (c) Date acquired (d) Date sold 2-story brick warehouse; or common stock, 200 shs. MLC Co.) (mo., day, yr.) (mo., day, yr.) 1a PUBLICLY TRADED SECURITIES P b PASS-THROUGH FROM K-1 INVESTMENTS P C d е (f) Depreciation allowed (h) Gain or (loss) (g) Cost or other basis (e) Gross sales price (or allowable) plus expense of sale ((e) plus (f) minus (g)) 2,708,948 2,708,948. 220,605 220,605. h C d (I) Gains (Col. (h) gain minus Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69. col. (k), but not less than -0-) or (j) Adjusted basis (k) Excess of col. (i) (i) FMV as of 12/31/69 Losses (from col. (h)) over col. (j), if any as of 12/31/69 2,708,948 a 220,605 b C d е If gain, also enter in Part I, line 7 2,929,553. 2 Capital gain net income or (net capital loss) 2 If (loss), enter -0- in Part I, line 7 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). N/A 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. Yes X No Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part. 1 Enter the appropriate amount in each column for each year; see the instructions before making any entries. (a) Base period years (d)
Distribution ratio
(col. (b) divided by col. (c)) (c) Adjusted qualifying distributions Net value of noncharitable-use assets Calendar year (or tax year beginning in) 2,515,786 32,674,552 2017 .076995 2,227,807 30,694,350. 072580 2016 2,022,943 34,107,119. .059311 2015 34,764,392. 2,922,372 2014 .084062 2,778,480 33,004,881. .084184 2013 .377132 2 Total of line 1, column (d) 2 3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years 3 .075426 33,879,972. 4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5 2,555,431. 5 Multiply line 4 by line 3 5 30,957. 6 Enter 1% of net investment income (1% of Part I, line 27b) 6 7 Add lines 5 and 6 7 2,586,388.

2,872,108.

8

See the Part VI instructions.

Enter qualifying distributions from Part XII, line 4

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

Section   Date of ruling or determination described in section 4940(d)(2), check here		art VI   Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4		See instru		Page 4	
Date of maining or determination letter:			340	300 1113111	10110	115)	
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here	18						
of Part I, Ime 27b c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b): 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 3 3 30, 957. 3 Add lines 1 and 2 5 Subtitle A (Income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Exempt foreign organizations. 1st withhold at source. 2 De Exempt foreign organizations. 1st withhold at source. 3 Exempt foreign organizations. 1st withhold at source. 4 Backup withholding erroneously withhold at Source. 5 Tax paid with application for extension of time to fite (Form 888) 6 Backup withholding erroneously withhold and payments. Add lines 68 through 6d 7 Totald credits and payments. Add lines 68 through 6d 8 Enter any penalty for underpayment of estimated tax. Deck here ☐ # Form 2220 is attached 9 Tax due if line for line 10 to locate the 2019 estimated tax. Policity for 10 overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 overpayment. If line 7 is more than though of lines 5 and 8, enter the amount overpaid 10 overpayment. If line 7 is more than 1500 during the year (either directly) or indirectly) for policical purposes? See the instructions for the definition if the animal of the 15 through 45 thro				, ,		<b>E</b> 7	
c. All other domestic foundations enter 2% of the 27h. Exempt foreign organizations, eiter 4% of Part I, line 12, col. (b).  2				3	<u>, U , 9</u>	<u>5/.</u>	
2 Tax unders section 511 (comestic section 4947(a)(1) trusts and taxable foundations only, others, enter-0-)  4 3 30,957,  4 3 Jobinic A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter-0-)  5 Tax based on investment income. Subtract time 4 from line 3, It zero or liss, enter-0-  5 Tax based on investment income. Subtract time 4 from line 3, It zero or liss, enter-0-  5 Tax based on investment income. Subtract time 4 from line 3, It zero or liss, enter-0-  6 B		·					
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c Tax pad with application for extension of time to Mile (Form 8688) d Backup withholding erroneously withheld d Backup withholding erroneously withheld 8 Enter any penalty for underpayment of estimated tax. Check here ☐ If Form 2220 is attached 9 Total credits and payments. Add lines 6a through 6d 8 Enter the total of lines a sond 8 is more than line 7, after amount owned 9 Tax due If the total of lines a sond 8 is more than line 7, after amount owned 9 Toverpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be. Credited to 2019 estimated tax ► 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition in the activities and copies of any materials published or distributed by the foundation in connection with the activities. 1c Did the foundation file Form 1120-POL for this year? 2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 2 If Yes; attach a detailed description of the activities. 3 If Yes; attach a detailed description of the activities. 4 If Yes; attach a detailed description of the activities. 5 O. 2 If Has the foundation neargaged in any activities that have not previously been reported to the IRS? 1 Yes and the foundation have unrelated business gross sone of \$1,000 or more during the year? 3 A X 4 A D the foundation have unrelated business gross sone come of \$1,000 or more during the year? 4 A X Yes A D the foundation have unrelated business gross sone sonem of \$1,000 or more d							
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7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due If the total of lines 5 and 8; smore than line 7, enter amount owed 9 Tax due If the total of lines 5 and 8; smore than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Total Check the amount of line 10 to be: Credited to 2019 estimated tax ▶ 63, 062. Refunded 11 Total Check Credited to 2019 estimated tax ▶ 63, 062. Refunded 11 Total Check Check Check the count of line 10 to be: Credited to 2019 estimated tax ▶ 63, 062. Refunded 11 Total Check							
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11. Enter the amount of time 10 to be: Credited to 2019 estimated tax	-	·					
Part VII-A   Statements Regarding Activities					3,U		
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?  1a			11			<u> </u>	
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If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.  C Did the foundation file Form 1120-POL for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  (1) On the foundation		• • • • •			├─-		
distributed by the foundation in connection with the activities.  c Did the foundation file Form 1120-P0L for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  (1) On the foundation ▶ \$ 0. (2) On foundation managers. ▶ \$ 0.  e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0.  2 Has the foundation engaged in any activities that have not previously been reported to the IRS?  If *Yes,* attach a detailed description of the activities.  3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If *Yes,* attach a conformed copy of the changes  4 Did the foundation have a increased business gross income of \$1,000 or more during the year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:  8 By language in the governing instrument, or  9 By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?  7 Did the foundation have at least \$5,000 in assets at any time during the year? If *Yes,* complete Part II, col. (c), and Part XV  7 X  8a Enter the states to which the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction GP</i> If *No,* attach explanation  9 Is the nanwer is *Yes* to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction</i> GP If *No,* attach explanation  9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginni	b		ition	<u> 1b</u>	├	X	
c Did the foundation file Form 1120-POL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. e Enter the reimbursement (if any) gaid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0.  2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.  3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes  4 Did the foundation have unrelated business gross income of \$1,000 or more during the year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:  9 By language in the governing instrument, or  9 By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument, or  1 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV  7 X  8 Enter the states to which the foundation reports or with which it is registered. See instructions. ▶  1 LA  b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation  9 Is the foundation clamming status as a private operating foundation within the mening of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV  9 X  10 Did any persons become substantial contributiors during the tax year? ir "ye						1	
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  (1) On the foundation		•				1	
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$  e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$  O .  1 Has the foundation engaged in any activities that have not previously been reported to the IRS?  If 'Yes,' attach a detailed description of the activities.  3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes  4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  4b X  b If 'Yes,' has it filed a tax return on Form 990-T for this year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:  • By language in the governing instrument, or  • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument??  7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, col. (c), and Part XV  7 X  8a Enter the states to which the foundation reports or with which it is registered. See instructions. ▶  LIA  b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation  9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If 'Yes,' complete Part XIV  9 X  10 Did any persons become substantial contributors during the tax year? in 'Yes,' attach a sche		·		<u>1c</u>	<del> </del>	X	
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	10	Uid any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	_		L DE	(0040)	

	Tegarding Activities (Continued)	_		
		<u> </u>	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
	section 512(b)(13)? If "Yes," attach schedule. See instructions	11		<u> X</u>
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?	40		v
40	If "Yes," attach statement. See instructions	12	Х	<u> </u>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Λ	
4.4	Website address ► WWW.FDNCENTER.ORG  The books are in care of ► EXECUTIVE DIRECTOR  Telephone no.►504-84	19_6	078	
14	Located at ► 524 METAIRIE ROAD, METAIRIE, LA  ZIP+4 ► 70			0.8
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here	,005		ŤŤ
	and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16	At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
	foreign country			
Pa	rt VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year, did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(5) Transfer any income or assets to a disqualified person (or make any of either available			
	for the benefit or use of a disqualified person)?			
	(6) Agree to pay money or property to a government official? (Exception Check "No"			
	If the foundation agreed to make a grant to or to employ the official for a period after			
	termination of government service, if terminating within 90 days.)			
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	ا ا		
	section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions  N/A	1b		
_	Organizations relying on a current notice regarding disaster assistance, check here			
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			X
2	before the first day of the tax year beginning in 2018?  Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	1c		<u> </u>
2	defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning			
	before 2018?			
	If "Yes," list the years <b>&gt;</b>			
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect			
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach			
	statement - see instructions.) N/A	2b		
C	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.			
_	<u> </u>			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
L	during the year?  Yes X No			
D	If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose			
	of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,			
	Form 4720, to determine if the foundation had excess business holdings in 2018 )  N/A	3b		
An	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	70		
J	had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		Х
		rm <b>99</b> 0	)-PF	

Part ¥II-B	Statements Regarding Activities for Which	Form 4720 May Be I	Required (contin	ued)	4	Ξ,	F
5a During the	year, did the foundation pay or incur any amount to:					Yes	No
(1) Carry o	n propaganda, or otherwise attempt to influence legislation (section	on 4945(e))?	Y	es 🗶 No 🛚	-		
(2) Influen	ce the outcome of any specific public election (see section 4955);	or to carry on, directly or indir	ectly,				
any vo	ter registration drive?		Y	es X No			
(3) Provide	e a grant to an individual for travel, study, or other similar purpose	s?	Y	es X No			
(4) Provide	e a grant to an organization other than a charitable, etc., organizati	on described in section					
	I)(4)(A)? See instructions		□ Y	es 🗓 No			
· ·	e for any purpose other than religious, charitable, scientific, literary	v. or educational purposes, or					
	vention of cruelty to children or animals?	,, , , , , ,		es X No			
•	er is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify up	nder the exceptions described					
	4945 or in a current notice regarding disaster assistance? See inst	·		N/A	5b		
	ns relying on a current notice regarding disaster assistance, check						
	er is "Yes" to question 5a(4), does the foundation claim exemption		uned	· —			
	responsibility for the grant?		J/A 🗌 Y	es No			
	ich the statement required by Regulations section 53.4945-5(d).	•	1,21				
	ndation, during the year, receive any funds, directly or indirectly, to	nay premilime on					
	penefit contract?	pay promiums on		es 🗶 No			
•	ndation, during the year, pay premiums, directly or indirectly, on a	narconal benefit contract?	١٠ لــــا	. Las 140	6b		Х
	b, file Form 8870.	personal benefit contract.		ŀ	UU		^
	•	abaltar transaction?		es 🗓 No			
<del>-</del>	during the tax year, was the foundation a party to a prohibited tax			N/A	7b		
	the foundation receive any proceeds or have any net income attrib			M/A	/ 0		
	dation subject to the section 4960 tax on payment(s) of more than	\$1,000,000 in remuneration o		es X No			
Part VIII	Information About Officers Directors True	toon Foundation Ma					
1 dit VIII	Information About Officers, Directors, Trus Paid Employees, and Contractors	tees, roundation wa	anagers, migni	y			
1 List all office	ers, directors, trustees, and foundation managers and	their compensation.					
		(b) Title, and average	(c) Compensation	(d) Contributions to		(e) Exn	ense
	(a) Name and address	nours per week devoted	(If not paid,	(d) Contributions to employee benefit plans and deferred	a a	(e) Exp ccount, allowai	other
		to position	enter -0-)	compensation		alluwai	1165
		-					
CEE CON	TEMENT 10	-{	120,000.	0			^
SEE SIA	EMENI IU		120,000.	<u> </u>	+		0.
	· · · · · ·	-					
		-					
		4					
	<del></del>	4					
					-		
		_					
		_					
		1 1 1 1 1 1					
2 Compensat	tion of five highest-paid employees (other than those in		enter "NONE."	(d) Contributions to	1	/_\ C	
(a) Nam	ne and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	employee benefit plans and deferred	i a	(e) Exp ccount,	, other
	, , ,	devoted to position	(0, 11,11	compensation		allowai	nces
NC	ONE						
	W ***** ***						
		_					
						-	
		1					
		<del> </del>	1				
		1					
Total number of	other employees paid over \$50,000		<u>.l</u>				0
TOTAL HUMBON OF	σιποι σπιρισγούο μαια σνοι φου,σου						

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WOLDENBERG FOUNDATION

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)	-
3 Five highest-paid independent contractors for professional services. If none, enter "NONE."	
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NONE	
Total number of others receiving over \$50,000 for professional services  Part IX-A   Summary of Direct Charitable Activities	▶ 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 DONATIONS FOR EDUCATIONAL INSTITUTIONS & RELATED ACTIVITIES	
2 DONATIONS FOR JEWISH CAUSES	929,143.
	668,125.
3 DONATIONS FOR ARTS, CULTURE & HUMANITIES	
4 DONATIONS FOR MEDICAL RESEARCH	320,333.
Part IX-B Summary of Program-Related Investments	222,500.
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.  3	
Total. Add lines 1 through 3	<b>▶</b> 0.

P	art.X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndation	ns, see instructions )
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	32,915,439.
	Average of monthly cash balances	1b	1,480,472.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	34,395,911.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	34,395,911.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	515,939.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	33,879,972.
6	Minimum investment return Enter 5% of line 5	6	1,693,999.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are	nd certa	ın
	foreign organizations, check here 🕨 🔛 and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	1,693,99 <u>9</u> .
2a	Tax on investment income for 2018 from Part VI, line 5		
b	Income tax for 2018. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	35,779.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	1,658,220.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,658,220.
6	Deduction from distributable amount (see instructions)	6	0.
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,658,220.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	2,872,108. 0.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	2,872,108.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	30,957.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	2,841,151.
	Note: The amount on line 6 will be used in Part V. column (b), in subsequent years when calculating whether the foundation	oualifies	s for the section

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4940(e) reduction of tax in those years.

# Part.XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI,	30.54	, care prior to Lo II		1,658,220.
line 7				1,030,220.
Undistributed income, if any, as of the end of 2018     a Enter amount for 2017 only			0.	
<b>b</b> Total for prior years:				
g rounds prior jours.		0.		
3 Excess distributions carryover, if any, to 2018.				
a From 2013 1,164,612.				
b From 2014 1,245,200.				
c From 2015 366,629.				
d From 2016 697,907.				
e From 2017 948,794.				
f Total of lines 3a through e	4,423,142.			
4 Qualifying distributions for 2018 from		-		
Part XII, line 4: $\triangleright$ \$ 2,872,108.				
a 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.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			
d Applied to 2018 distributable amount				1,658,220.
e Remaining amount distributed out of corpus	1,213,888.			
5 Excess distributions carryover applied to 2018 (if an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	5,637,030.			
b Prior years' undistributed income. Subtract	, ,			
line 4b from line 2b		0.		
c Enter the amount of prior years'				
undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2017. Subtract line			-	
4a from line 2a. Taxable amount - see instr			0.	
f Undistributed income for 2018, Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2019				0.
7 Amounts treated as distributions out of		-		
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3) (Election				
may be required - see instructions)	0.			
8 Excess distributions carryover from 2013				
not applied on line 5 or line 7	1,164,612.			
9 Excess distributions carryover to 2019.				
Subtract lines 7 and 8 from line 6a	4,472,418.			· · · · · · · · · · · · · · · · · · ·
10 Analysis of line 9				
a Excess from 2014 1, 245, 200.				
b Excess from 2015 366, 629.				
c Excess from 2016 697, 907.				
d Excess from 2017 948, 794.				
e Excess from 2018 1,213,888.				Form 000 DE (0040)
823581 12-11-18				Form <b>990-PF</b> (2018)

	BERG FOUNDA'		W.A		22665 Page 1
Part XIV Private Operating			II-A, question 9)	N/A	
1 a litthe foundation has received a ruling foundation, and the ruling is effective to		_			
<b>b</b> Check box to indicate whether the four		-	in section	4942(J)(3) or 49	142(1)(5)
2 a Enter the lesser of the adjusted net	Tax year	Touridation described	Prior 3 years	+542(J)(0) 01	19811(0)
•	(a) 2018	<b>(b)</b> 2017	(c) 2016	(d) 2015	(a) Total
income from Part I or the minimum	(a) 2010	(0) 2017	(6) 20 10	(u) 2013	(e) Total
investment return from Part X for					
each year listed					
<b>b</b> 85% of line 2a	r				
c Qualifying distributions from Part XII,					
line 4 for each year listed					
d Amounts included in line 2c not					
used directly for active conduct of					
exempt activities		<u> </u>			
e Qualifying distributions made directly					I
for active conduct of exempt activities.	.				I
Subtract line 2d from line 2c					I
3 Complete 3a, b, or c for the		-			
alternative test relied upon;					I
a "Assets" alternative test - enter:					I
(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					I
shown in Part X, line 6 for each year					
listed			<u> </u>		
c "Support" alternative test - enter:					
(1) Total support other than gross					
investment income (interest,				1	
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(i)(3)(B)(iii)					<u>.                                    </u>
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income					
Part XV   Supplementary Inf	ormation (Compl	ete this part only	if the foundation	n had \$5 000 or mo	re in accete
at any time during			ii tile loulluatio	ii iiau \$5,000 oi iiic	ne iii assets
at any time during	the year-see insi	tructions.)			
1 Information Regarding Foundati	ion Managers:				
a List any managers of the foundation w	ho have contributed more	e than 2% of the total con	tributions received by th	e foundation before the clos	se of any tax
year (but only if they have contributed	more than \$5,000). (See	section 507(d)(2).)			
NONE					
b List any managers of the foundation w	the own 10% or more of t	he stock of a corporation	/or an equally large port	ion of the ownership of a na	artnership or
other entity) of which the foundation h			(or all equally large port	ion of the ownership of a pa	II tilei Silip Oi
• •	as a rore or ground miles				
NONE					
2 Information Regarding Contribu					
Check here 🕨 📖 if the foundation	only makes contributions	to preselected charitable	organizations and does	not accept unsolicited requ	ests for funds. If
the foundation makes gifts, grants, etc	:., to individuals or organi	zations under other condi	tions, complete items 2a	, b, c, and d.	
a The name, address, and telephone nur	mber or email address of	the person to whom apple	cations should be addre	ssed:	
LISA B. WILLIAMS, 5					
		-			
524 METAIRIE ROAD,					
b The form in which applications should		ation and materials they s	nould include.		
EMAIL LISA@GFF1.ORG					
c Any submission deadlines:					
N/A					
d Any restrictions or limitations on awar	ds, such as by geographic	cal areas, charitable fields	, kınds of ınstitutions, or	other factors:	
N/A					

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Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Y	ear or Approved for Future	Payment		<del> </del>
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
a Paid during the year				
RANTS PAID (SEE PART XV LINE 3A	NONE	501(C)(3)	TO SUPPORT THE EXEMPT	
TTACHMENT)			PURPOSE OF THE	
24 METAIRIE ROAD			RECIPIENT ORGANIZATION	
ETAIRIE, LA 70005				2,748,037
	-			-
Total			<b>▶</b> 3a	2,748,037
b Approved for future payment		<u></u>	54	2,748,037
RANTS APPROVED (SEE PART XV LINE 3B	NONE	501(C)(3)	TO SUPPORT THE EXEMPT	
24 METAIRIE ROAD			RECIPIENT ORGANIZATION	
ETAIRIE LA 70005				9,266,836
		-		
		1	<b>▶</b> 3b	

#### Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated bu	siness income		d by section 512, 513, or 514	(e)
•	(a) Business	(b) Amount	(C) Exclu- sion	(d) Amount	Related or exempt function income
1 Program service revenue:	code		code		
a					
b	- <del>  -               -</del>				
<u> </u>					
d					<del></del>
e					
g Fees and contracts from government agencies					
2 Membership dues and assessments		_			
3 Interest on savings and temporary cash					
investments		_	14	410.	
4 Dividends and interest from securities			14	410. 379,347.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property				-	
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			14	780.	
8 Gain or (loss) from sales of assets other than inventory			18	2,929,553.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue.					
a PASS-THROUGH UBTI FROM					
b K-1 INVESTMENTS	523000	23,961.			
c					
d					
e	_				<del> </del>
12 Subtotal Add columns (b), (d), and (e)		23,961.		3,310,090.	
13 Total. Add line 12, columns (b), (d), and (e)				13	3,334,05

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

Line No	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of									
	the foundation's exempt purposes (other than by providing funds for such purposes).									
3	EARNINGS ON EXEMPT FUNDS TO BE DISTRIBUTED TO CHAR. ORG									
4	EARNINGS ON EXEMPT FUNDS TO BE DISTRIBUTED TO CHAR. ORG									
<u>4</u> 7	EARNINGS ON EXEMPT FUNDS TO BE DISTRIBUTED TO CHAR. ORG									
8	GAINS ON SALE OF INVESTMENTS TO BE DISTRIBUTED TO CHAR. ORG									

พบบบะเทยะRG FOUNDATION 72-6022665 ัั คัสติ์ 13
Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

1	Did the o	rganization directly or indir	rectly engage in any	of the following	ng with any other organization	on described in secti	on 501(c)		Yes	No
(other than section 501(c)(3) organizations) or in section 527, relating to political organizations?										
a	a Transfers from the reporting foundation to a noncharitable exempt organization of:									
	(1) Cash	ר						1a(1)		<u> </u>
	(2) Othe							1a(2)		<u> </u>
b		nsactions:								
	` '	s of assets to a noncharital						1b(1)		<u> </u>
		chases of assets from a nor		organization				1b(2)		X
		tal of facilities, equipment,						1b(3)		X
	· •	nbursement arrangements ns or loan guarantees						1b(4) 1b(5)		X
		ormance of services or me	mhershin or fundra	ısına solicitatio	nne			1b(6)		X
C		of facilities, equipment, ma						1c		X
						ways show the fair n	ı arket value of the goods, otl		ets,	
							or sharing arrangement, she		·	
	column (	d) the value of the goods,	other assets, or serv	vices received.						
(a) ı	ine no	(b) Amount involved	(c) Name o	f noncharitable	e exempt organization	(d) Description	of transfers, transactions, and sh	arıng arra	ngeme	nts
				N/A						
		,							_	
			<u> </u>				· · ·			
			<u> </u>							
	-									
			-	·						
						·   · · · · ·				
		<del></del>				<del>-  </del>				
									••	
							_			
			<u> </u>							
2a	Is the fou	indation directly or indirect	ly affiliated with, or	related to, one	or more tax-exempt organi	zations described		_		=
		n 501(c) (other than section		ection 527?			LX.	Yes	L	No
b	If "Yes," o	complete the following sche			[ <del>-</del>	т			_	
		(a) Name of org			(b) Type of organization		c) Description of relationship	<del></del>		
<u>30</u>	LDRII	NG FAMILY FO	UNDATION		501 (C)(3)	SEE STAT	EMENT 11			
-										
	Unde	er penalties of perjury, declare t	that I have examined th	is return, includin	I ng accompanying schedules and	statements, and to the	pest of my knowledge	100.1		
Si	gn and b	pelief, it is true, correct, and corr	plete Declaration of pr	reparer (other tha	n taxpayer) is based on all inform	nation of which preparer	return	he IRS di with the below?	prepare	er i
He	ere	MOW			12/5/19	EXEC D	IRECTOR	Yes	See ins	No
	Sig	natule of officer or trustee			Date	Title				
		Print/Type preparer's na	me	Preparer's s	ignature /	Date	Check if PTIN			
		D. TROY BO	UCHER,	10/19th	Delle		self- employed			
	id	CPA	<del>.</del>	ď ŤRÓ	Y BOUCHER,	11/04/19	P00			
	eparer	Firm's name MAL	COLM M. I	DIENES,	L.L.C.		Firm's EIN ► 72-04	4029	7	
Us	se Only									
		Firm's address ► 61								
		ME_	TAIRIE, I	A 7000	1-5341		Phone no (504)			
							For	n <b>990</b>	-PF (	2018)

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#### GRANTS PAID (SEE PART XV LINE 3A)

Charitable Organization	Relationship to foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Animal Related				
Audubon Institute	None	501(c)(3)	To support the exempt purpose of the recipient organization	100,000
Arts, Culture, Humanities				100,000
Louisiana Children's Museum	None	501(c)(3)	To support the exempt purpose of the recipient organization	83,333
Louisiana Endowment for the Humanities	None	501(c)(3)	To support the exempt purpose of the recipient organization	5,000
Louisiana Philharmonic Orchestra	None	501(c)(3)	To support the exempt purpose of the recipient organization '	5,000
National World War II Museum Inc	None	501(c)(3)	To support the exempt purpose of the recipient organization	214,000
New Orleans Opera Association	None	501(c)(3)	To support the exempt purpose of the recipient organization	. 3,000
Ogden Museum of Southern Art	None	501(c)(3)	To support the exempt purpose of the recipient organization	10,000
Civil Rights, Social Action, A	dvocacy			320,333
Anti-Defamation League	None	501(c)(3)	To support the exempt purpose of the recipient organization	7,500
Louisiana Center for Children's Rights	None	501(c)(3)	To support the exempt purpose of the recipient organization	2,500
Community Improvement, Ca	pacity Building			10,000
Urban League of Greater New Orleans	None	501(c)(3)	To support the exempt purpose of the recipient organization	15,000
Crime, Legal Related				15,000
Crime, Legal Related Crime Stoppers	None	501(c)(3)	To support the exempt purpose of the recipient organization	<u> </u>
	None None	501(c)(3) 501(c)(3)		5,000 10,000
Crime Stoppers			the recipient organization  To support the exempt purpose of	5,000

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#### **GRANTS PAID (SEE PART XV LINE 3A)**

Charitable Organization	Relationship to foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Bridge House/Grace House	None	501(c)(3)	To support the exempt purpose of the recipient organization	11,111
Bndge House/Grace House	None	501(c)(3)	To support the exempt purpose of the recipient organization	25,000
Special Olympics	None	501(c)(3)	To support the exempt purpose of the recipient organization	1,000

#### Educational Institutions & Related Activities

4 0 Schools	None	501(c)(3)	To support the exempt purpose of the recipient organization	5,000
Breakthrough New Orleans	None	501(c)(3)	To support the exempt purpose of the recipient organization	5,000
FirstLine Schools	None	501(c)(3)	To support the exempt purpose of the recipient organization	17,000
New Orleans Culinary and Hospitality Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	100,000
New Schools for New Orleans	None	501(c)(3)	To support the exempt purpose of the recipient organization	50,000
Posse Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	20,000
Teach for America	None	501(c)(3)	To support the exempt purpose of the recipient organization	125,000
Tulane University - Office of Development	None	501(c)(3)	To support the exempt purpose of the recipient organization	607,143

929,143

#### Employment, Job Related

	Greater NO Development Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	12,500
--	-----------------------------------	------	-----------	---	--------

12,500

#### Grantmaking, Philanthropy, Voluntarism

Goldring Family Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	60,000
Steeg Family Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	15,000

75,000

#### Health-General & Rehabilitation

	<del></del>		·	
Save A Child's Heart	None	501(c)(3)	To support the exempt purpose of	
Cave / Crima o / Ioan	1	001(0)(0)	the recipient organization	5,000

5,000

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# **GRANTS PAID (SEE PART XV LINE 3A)**

Charitable Organization	Relationship to foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Health-Mental & Crisis Inte	rvention			
LSUHSC Dept of Pyschiatry	None	501(c)(3)	To support the exempt purpose of the recipient organization	1,000
Housing, Shelter				1,000
Broward Partnership for the Homeless	None	501(c)(3)	To support the exempt purpose of the recipient organization	2,200
Human Services				2,200
Catholic Charities Association	None	501(c)(3)	To support the exempt purpose of the recipient organization	50,000
Covenant House	None	501(c)(3)	To support the exempt purpose of the recipient organization	20,000
Covenant House	None	501(c)(3)	To support the exempt purpose of the recipient organization	10,000
Kingsley House	None	501(c)(3)	To support the exempt purpose of the recipient organization	5,000
Legacy Donor Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	4,500
Magnolia Community Services	None	501(c)(3)	To support the exempt purpose of the recipient organization	2,000
Make A Wish Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	2,500
New Orleans Women's Shelter	None	501(c)(3)	To support the exempt purpose of the recipient organization	15,000
United Way of Greater New Orleans	None	501(c)(3)	To support the exempt purpose of the recipient organization	20,000
Warrior Writers	None	501(c)(3)	To support the exempt purpose of the recipient organization	3,000
Jewish Causes				132,000
American Friends of Alyn Hospital	None	501(c)(3)	To support the exempt purpose of the recipient organization	150,000
Avodah New Orleans	None	501(c)(3)	To support the exempt purpose of the recipient organization	20,000
Birthright Israel Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	100,000
Chabad Lubavitch of Louisiana	None	501(c)(3)	To support the exempt purpose of the recipient organization	7,500
Friends of Ir David, Inc	None	501(c)(3)	To support the exempt purpose of the recipient organization	34,000



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#### **GRANTS PAID (SEE PART XV LINE 3A)**

Charitable Organization	Relationship to foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
				<u> </u>
Friends of Yemin Orde	None	501(c)(3)	To support the exempt purpose of the recipient organization	9,000
Hillel Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	5,000
Institute of Southern Jewish Life	None	501(c)(3)	To support the exempt purpose of the recipient organization	22,000
Jewish Children's Regional Service	None	501(c)(3)	To support the exempt purpose of the recipient organization	15,000
Jewish Community Center	None	501(c)(3)	To support the exempt purpose of the recipient organization	97,145
Jewish Family Services	None	501(c)(3)	To support the exempt purpose of the recipient organization	25,000
Jewish Federation of Greater New Orleans	None	501(c)(3)	To support the exempt purpose of the recipient organization	159,980
National Jewish Health	None	501(c)(3)	To support the exempt purpose of the recipient organization	1,000
Shir Chadash	None	501(c)(3)	To support the exempt purpose of the recipient organization	5,000
Temple Beth Sholom	None	501(c)(3)	To support the exempt purpose of the recipient organization	3,500
Temple Beth Sholom	None	501(c)(3)	To support the exempt purpose of the recipient organization	4,000
Temple Or Amı	None	501(c)(3)	To support the exempt purpose of the recipient organization	5,000
World Jewish Congress - American Section	None	501(c)(3)	To support the exempt purpose of the recipient organization	5,000

668,125

#### Medical Research

CAGNO/Breastoration	None	501(c)(3)	To support the exempt purpose of the recipient organization	5,000
Fred Hutchinson Cancer Research Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	10,000
Mt Sinai Medical Center Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	200,000
Mt Sinai Medical Center Foundation	None	501(c)(3)	To support the exempt purpose of the recipient organization	7,500

222,500

#### Youth Development

City Year	None	501(c)(3)	To support the exempt purpose of the recipient organization	15,000
Kidsmart	None	501(c)(3)	To support the exempt purpose of the recipient organization	7,500
Liberty's Kitchen	None	501(c)(3)	To support the exempt purpose of the recipient organization	20,000

72-6022665

## **GRANTS PAID (SEE PART XV LINE 3A)**

Charitable Organization	Relationship to foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Reconcile New Orleans	None	501(c)(3)	To support the exempt purpose of the recipient organization	5,000
Youth Empowerment Project	None	501(c)(3)	To support the exempt purpose of the recipient organization	15,000

62,500

#### Scholarships Paid by School

School 1 and by School				
Brescia University	None	501(C)(3)	To support the exempt purpose of the recipient organization	1,750
Centre College	None	501(C)(3)	To support the exempt purpose of the recipient organization	1,750
Indiana University	None	501(C)(3)	To support the exempt purpose of the recipient organization	1,750
Jefferson Community College	None	501(C)(3)	To support the exempt purpose of the recipient organization	1,750
Northwestern College	None	501(C)(3)	To support the exempt purpose of the recipient organization	1,750
owcc	None	501(C)(3)	To support the exempt purpose of the recipient organization	1,750
Owensboro Community College	None	501(C)(3)	To support the exempt purpose of the recipient organization	1,750
Southeastern Louisiana	None	501(C)(3)	To support the exempt purpose of the recipient organization	1,750
Transylviania University	None	501(C)(3)	To support the exempt purpose of the recipient organization	1,750
Elizabethtown Community College	None	501(C)(3)	To support the exempt purpose of the recipient organization	3,500
Liberty University	None	501(C)(3)	To support the exempt purpose of the recipient organization	3,500
Northwest Florida State College	None	501(C)(3)	To support the exempt purpose of the recipient organization	3,500
Purdue University	None	501(C)(3)	To support the exempt purpose of the recipient organization	3,500
Samford University	None	501(C)(3)	To support the exempt purpose of the recipient organization	3,500
University of Kansas	None	501(C)(3)	To support the exempt purpose of the recipient organization	3,500
Midway University	None	501(C)(3)	To support the exempt purpose of the recipient organization	5,250
Mississippi State University	None	501(C)(3)	To support the exempt purpose of the recipient organization	5,250
University of West Florida	None	501(C)(3)	To support the exempt purpose of the recipient organization	5,250
University of Kentucky	None	501(C)(3)	To support the exempt purpose of the recipient organization	7,000
Kentucy Wesleyan College	None	501(C)(3)	To support the exempt purpose of the recipient organization	10,500

72-6022665

## **GRANTS PAID (SEE PART XV LINE 3A)**

Charitable Organization	Relationship to foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Eastern Kentucky University	None	501(C)(3)	To support the exempt purpose of the recipient organization	19,250
University of Louisville	None	501(C)(3)	To support the exempt purpose of the recipient organization	21,000
Western Kentucky University	None	501(C)(3)	To support the exempt purpose of the recipient organization	25,375
				135,625

Total Contributions, Gifts, Grants Paid

2,748,037

£ 20 .

#### **GRANTS APPROVED (SEE PART XV LINE 3B)**

Charitable Organization	Relationship to foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
AUDUBON INSTITUTE	None	501(c)(3)	To support the exempt purpose of the recipient organization	750,000
BRIDGE HOUSE/GRACE HOUSE - CAPITAL CAMPAIGN	None	501(c)(3)	To support the exempt purpose of the recipient organization	750,000 } 22,223
BRIDGE HOUSE/GRACE HOUSE - GRACE HOUSE CAMPAIGN	None	501(c)(3)	To support the exempt purpose of the recipient organization	33,000
CHILDRENS HOSPITAL	None	501(c)(3)	To support the exempt purpose of the recipient organization	1,000,000
COVENANT HOUSE	None	501(c)(3)	To support the exempt purpose of the recipient organization	80,000
ELLIS MARSALIS MUSIC CENTER	None	501(c)(3)	To support the exempt purpose of the recipient organization	25,000
FIRSTLINE SCHOOLS	None	501(c)(3)	To support the exempt purpose of the recipient organization	17,000
FRIENDS OF CITY OF DAVID	None	501(c)(3)	To support the exempt purpose of the recipient organization	66,000
INST OF SOUTHERN JEWISH LIFE	None	501(c)(3)	To support the exempt purpose of the recipient organization	200,000
JEWISH COMMUNITY CENTER	None	501(c)(3)	To support the exempt purpose of the recipient organization	388,565
JEWISH FEDERATION OF GNO	None	501(c)(3)	To support the exempt purpose of the recipient organization	350,000
LOUISIANA CHILDREN'S MUSEUM	None	501(c)(3)	To support the exempt purpose of the recipient organization	83,334
MT SINAI MEDICAL FOUNDATION	None	501(c)(3)	To support the exempt purpose of the recipient organization	1,000,000
NATIONAL WWII MUSEUM	None	501(c)(3)	To support the exempt purpose of the recipient organization	1,286,000
NEW SCHOOLS NEW ORLEANS	None	501(c)(3)	To support the exempt purpose of the recipient organization	100,000
мосні	None	501(c)(3)	To support the exempt purpose of the recipient organization	400,000
POSSE FOUNDATION	None	501(c)(3)	To support the exempt purpose of the recipient organization	40,000
TEACH FOR AMERICA	None	501(c)(3)	To support the exempt purpose of the recipient organization	375,000
TULANE UNIVERSITY	None	501(c)(3)	To support the exempt purpose of the recipient organization	3,035,714
URBAN LEAGUE	None	501(c)(3)	To support the exempt purpose of the recipient organization	15,000 9,266,836

FORM 990-PF INTERE	ST ON SAVING	GS AN	D TEMPOR	ARY	CASH	IN	VESTMENTS	S.	PATEMENT	1
SOURCE			(A) REVENUE NE PER BOOKS			(B) NET INVESTMENT INCOME		(C) ADJUSTED NET INCOME		
INVESTMENT PORTFOLI	0		410.				410.		410.	
TOTAL TO PART I, LI	OTAL TO PART I, LINE 3		410.		410.		410.	410.		0.
FORM 990-PF	DIVIDENDS	AND	INTEREST	FROI	M SEC	UR	ITIES	S	PATEMENT	2
SOURCE	GROSS AMOUNT	G	PITAL AINS IDENDS	RE	(A) VENUE BOOK	E NET INVEST- AL		(C) ADJUSTE NET INCO		
INVESTMENT PORTFOLIO PASS-THROUGH FROM K-1 INVESTMENTS	363,802. 15,545.		0.		63,80 15,54		363,80		363,80	
TO PART I, LINE 4	379,347.		0.					379,34		
FORM 990-PF		ОТ	HER INCO	ME				SI	PATEMENT	3
DESCRIPTION			RE	(A) VENUI BOOI			(B) ET INVEST- ENT INCOME		(C) ADJUSTED NET INCOM	
MISCELLANEOUS PASS-THROUGH FROM K-1 INVESTMENTS PASS-THROUGH UBTI FROM K-1				770. 10.		770 10	•	•	0.	
INVESTMENTS TOTAL TO FORM 990-P	F, PART I, I	LINE	11		,961. .741.		780			0. 0.

DESCRIPTION    CA)   CEXPENSES   NET INVEST-   ADJUSTED   CHARITABLE PURPOSES	FORM 990-PF	ACCOUNTI	STATEMENT 4			
TO FORM 990-PF, PG 1, LN 16B	DESCRIPTION	<b>EXPENSES</b>	NET INVEST-	ADJUSTEI	D CHAR	RITABLE
TOTAL TO FORM 990-PF   CORPORATE STOCK   STATEMENT   STATEMENT	ACCOUNTING FEES	8,950.	2,238.		0.	6,712.
CA	TO FORM 990-PF, PG 1, LN 16B	8,950.	2,238.		0.	6,712.
DESCRIPTION	FORM 990-PF	OTHER E	XPENSES		STATEME	NT 5
INSURANCE	DESCRIPTION	EXPENSES	NET INVEST-	ADJUSTEI	D CHAR	ITABLE
### FROM K-1 INVESTMENTS	INSURANCE INVESTMENT FEES MISCELLANEOUS	15,136. 151,777.	3,784. 151,777.		0. 1 0.	1,352.
FORM 990-PF OTHER DECREASES IN NET ASSETS OR FUND BALANCES STATEMENT 6  DESCRIPTION AMOUNT  BOOK/TAX DIFFERENCES ON RECOGNITION OF K-1 INCOME 195,025.  TOTAL TO FORM 990-PF, PART III, LINE 5 195,025.  FORM 990-PF CORPORATE STOCK STATEMENT 7  DESCRIPTION BOOK VALUE VALUE  CORPORATE STOCK 19,161,702. 22,664,559.	FROM K-1 INVESTMENTS	21,302.	21,302.	_	0.	0.
DESCRIPTION  BOOK/TAX DIFFERENCES ON RECOGNITION OF K-1 INCOME  TOTAL TO FORM 990-PF, PART III, LINE 5  FORM 990-PF  CORPORATE STOCK  BOOK VALUE  FAIR MARKET VALUE  CORPORATE STOCK  19,161,702. 22,664,559.	TO FORM 990-PF, PG 1, LN 23	188,879.	177,029.		0	1,850.
BOOK/TAX DIFFERENCES ON RECOGNITION OF K-1 INCOME  TOTAL TO FORM 990-PF, PART III, LINE 5  FORM 990-PF  CORPORATE STOCK  BOOK VALUE  FAIR MARKET VALUE  CORPORATE STOCK  19,161,702. 22,664,559.	FORM 990-PF OTHER DECREASE	S IN NET AS	SETS OR FUND	BALANCES	STATEME	NT 6
TOTAL TO FORM 990-PF, PART III, LINE 5  FORM 990-PF  CORPORATE STOCK  STATEMENT 7  DESCRIPTION  CORPORATE STOCK  BOOK VALUE  19,161,702. 22,664,559.	DESCRIPTION				AMOU	NT
FORM 990-PF CORPORATE STOCK STATEMENT 7  DESCRIPTION BOOK VALUE VALUE  CORPORATE STOCK 19,161,702. 22,664,559.	BOOK/TAX DIFFERENCES ON RECOG	NITION OF K	-1 INCOME		19	5,025.
DESCRIPTION  BOOK VALUE  VALUE  CORPORATE STOCK  19,161,702. 22,664,559.	TOTAL TO FORM 990-PF, PART II	I, LINE 5			19	5,025.
DESCRIPTION BOOK VALUE VALUE  CORPORATE STOCK 19,161,702. 22,664,559.	FORM 990-PF	CORPORAT	E STOCK		STATEME	NT 7
	DESCRIPTION		ВС	OOK VALUE		
TOTAL TO FORM 990-PF, PART II, LINE 10B 19,161,702. 22,664,559.	CORPORATE STOCK		1	9,161,702.	22,66	4,559.
	TOTAL TO FORM 990-PF, PART II, LINE 10B			9,161,702.	22,66	4,559.

	CORPORATE BONDS		STAT	EMENT	8
DESCRIPTION		BOOK VALUE		MARKET ALUE	
CORPORATE BONDS	-	2,686,32	8. 2	,621,39	6.
TOTAL TO FORM 990-PF, PART I	I, LINE 10C	2,686,328	8. 2	,621,39	6.
FORM 990-PF	OTHER INVESTMENTS		STAT	EMENT	9
DESCRIPTION	VALUATION METHOD	BOOK VALUE		MARKET ALUE	•
OTHER INVESTMENTS	COST	2,547,420	5. 3	3,137,912.	
TOTAL TO FORM 990-PF, PART I	I, LINE 13	2,547,420	5. 3	,137,91	2.
TRUSTEE	S AND FOUNDATION MANA	IRECTORS GERS		EMENT	_
NAME AND ADDRESS	TITLE AND AVRG HRS/WK	GERS 	EMPLOYEE BEN PLAN CONTRIB	EXPENS	
	TITLE AND	GERS  COMPEN- SATION	BEN PLAN	EXPENS ACCOUN	SE IT
NAME AND ADDRESS WM. GOLDRING 524 METAIRIE ROAD	TITLE AND AVRG HRS/WK BOARD PRESIDEN	GERS  COMPEN- SATION  T	BEN PLAN CONTRIB	EXPENS ACCOUN	E
NAME AND ADDRESS  WM. GOLDRING 524 METAIRIE ROAD METAIRIE, LA 70005-4308  MARK HALPERN 524 METAIRIE ROAD	TITLE AND AVRG HRS/WK  BOARD PRESIDEN' 5.00  BOARD MEMBER	COMPEN- I SATION	BEN PLAN CONTRIB 0.	EXPENS ACCOUN	0.
NAME AND ADDRESS  WM. GOLDRING 524 METAIRIE ROAD METAIRIE, LA 70005-4308  MARK HALPERN 524 METAIRIE ROAD METAIRIE, LA 70005-4308  ROBERT STEEG 524 METAIRIE ROAD	TITLE AND AVRG HRS/WK  BOARD PRESIDEN' 5.00  BOARD MEMBER 10.00	COMPEN- I SATION  T  0.	CONTRIB  0.	EXPENS ACCOUN	GE UT O.

WOLDENBERG FOUNDATION		72	-6022665
PAUL L FINE TREAS 524 METAIRIE ROAD 5 METAIRIE, LA 70005-4308	URER .00 0.	0.	0.
TRUDI BRIEDE SECRE 524 METAIRIE ROAD 20 METAIRIE, LA 70005-4308	TARY .00 0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART	VIII 120,000.	0.	0.

990-PF

AFFILIATION WITH TAX-EXEMPT ORGANIZATIONS PART XVII, LINE 2, COLUMN (C)

STATEMENT

11

NAME OF AFFILIATED OR RELATED ORGANIZATION

GOLDRING FAMILY FOUNDATION

DESCRIPTION OF RELATIONSHIP WITH AFFILIATED OR RELATED ORGANIZATION

COMMON DIRECTORS