

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. 1545-0047

**2021**

**Open to Public Inspection**

**For calendar year 2021, or tax year beginning 01-01-2021, and ending 12-31-2021**

Name of foundation BERNARD AND ANNE SPITZER CHARITABLE TRUST		<b>A Employer identification number</b> 13-7298842
Number and street (or P.O. box number if mail is not delivered to street address) 555 MADISON AVE 18TH FLOOR	Room/suite	<b>B Telephone number</b> (see instructions) (212) 757-5462
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10022		<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>681,865,070</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>	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)				
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch. B				
	<b>3</b> Interest on savings and temporary cash investments	1,127,250	1,127,250		
	<b>4</b> Dividends and interest from securities	3,235,444	3,235,444		
	<b>5a</b> Gross rents	11,264,984	10,279,570		
	<b>b</b> Net rental income or (loss)	-589,583			
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	22,245,023			
	<b>b</b> Gross sales price for all assets on line 6a	88,528,897			
	<b>7</b> Capital gain net income (from Part IV, line 2)		22,237,441		
	<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)	-2,588,306	-2,737,625			
<b>12 Total.</b> Add lines 1 through 11	35,284,395	34,142,080			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc.	766,783			766,783
	<b>14</b> Other employee salaries and wages	502,543			502,543
	<b>15</b> Pension plans, employee benefits	307,086			307,086
	<b>16a</b> Legal fees (attach schedule)	56,364	56,364		
	<b>b</b> Accounting fees (attach schedule)	116,600	116,600		
	<b>c</b> Other professional fees (attach schedule)	92,550			92,550
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions)	257,184			
	<b>19</b> Depreciation (attach schedule) and depletion	4,444,066	4,186,912		
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings				
	<b>22</b> Printing and publications				
	<b>23</b> Other expenses (attach schedule)	7,738,467	6,769,190		327,966
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	14,281,643	11,129,066		1,996,928
	<b>25</b> Contributions, gifts, grants paid	41,699,423			41,699,423
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	55,981,066	11,129,066		43,696,351	
<b>27</b> Subtract line 26 from line 12:					
<b>a Excess of revenue over expenses and disbursements</b>	-20,696,671				
<b>b Net investment income</b> (if negative, enter -0-)		23,013,014			
<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 . . . . .			
	<b>2</b> Savings and temporary cash investments . . . . .	3,670,777	41,242,526	41,242,526
	<b>3</b> Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>4</b> Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .	802,748	655,758	655,758
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .			
	<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) . . . . .	495,987,915	423,601,314	585,199,438
	<b>14</b> Land, buildings, and equipment: basis ▶ _____ 54,766,323 Less: accumulated depreciation (attach schedule) ▶ 13,747,478	42,999,819	41,018,845	54,766,323
<b>15</b> Other assets (describe ▶ _____)	476,347	1,025	1,025	
<b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	543,937,606	506,519,468	681,865,070	
<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) . . . . .	5,000,000	5,000,000	
	<b>22</b> Other liabilities (describe ▶ _____)	1,446,282	242,116	
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	6,446,282	5,242,116	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .			
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .			
	<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund			
	<b>28</b> Retained earnings, accumulated income, endowment, or other funds	537,491,324	501,277,352	
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	537,491,324	501,277,352		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) .	543,937,606	506,519,468		

<b>Part III Analysis of Changes in Net Assets or Fund Balances</b>		
<b>1</b> Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return) . . . . .	<b>1</b>	537,491,324
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-20,696,671
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	1,887
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	516,796,540
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	15,519,188
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	<b>6</b>	501,277,352



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

<b>1a</b>	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
<b>b</b>	All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	
<b>3</b>	Add lines 1 and 2. . . . .	<b>3</b>	319,881
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	<b>5</b>	319,881
<b>6</b>	Credits/Payments:		
<b>a</b>	2021 estimated tax payments and 2020 overpayment credited to 2021	<b>6a</b>	468,702
<b>b</b>	Exempt foreign organizations—tax withheld at source . . . . .	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868) . . . . .	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld . . . . .	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d. . . . .	<b>7</b>	468,702
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached.	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . . ▶	<b>9</b>	
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . . ▶	<b>10</b>	148,821
<b>11</b>	Enter the amount of line 10 to be: <b>Credited to 2022 estimated tax</b> ▶ 148,821 <b>Refunded</b> ▶	<b>11</b>	

**Part VI-A Statements Regarding Activities**

	Yes	No
<b>1a</b>		No
<b>b</b>		No
<b>c</b>		No
<b>d</b>		
<b>e</b>		
<b>2</b>		No
<b>3</b>		No
<b>4a</b>	Yes	
<b>4b</b>	Yes	
<b>5</b>		No
<b>6</b>	Yes	
<b>7</b>	Yes	
<b>8a</b>		
<b>8b</b>	Yes	
<b>9</b>		No
<b>10</b>		No

Part VI-A Statements Regarding Activities (continued)

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

Located at 555 MADISON AVE 18TH FLOOR NEW YORK NY ZIP+4 100223300

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here and enter the amount of tax-exempt interest received or accrued during the year 15

Table with 3 columns: Question, Yes, No. Row 16 regarding foreign accounts.

Part VI-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 for Part VI-B with 3 columns: Question, Yes, No. Rows 1a-4b regarding Form 4720 exceptions and requirements.

**Part VI-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>
	<b>(1)</b> Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?. . . . .	<b>5a(1)</b>		<b>No</b>
	<b>(2)</b> Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?. . . . .	<b>5a(2)</b>		<b>No</b>
	<b>(3)</b> Provide a grant to an individual for travel, study, or other similar purposes?. . . . .	<b>5a(3)</b>		<b>No</b>
	<b>(4)</b> Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions. . . . .	<b>5a(4)</b>		<b>No</b>
	<b>(5)</b> Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?. . . . .	<b>5a(5)</b>		<b>No</b>
<b>b</b>	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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>		
<b>c</b>	Organizations relying on a current notice regarding disaster assistance check . . . . . <input type="checkbox"/>			
<b>d</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?. . . . . If "Yes," attach the statement required by Regulations section 53.4945–5(d).	<b>5d</b>		
<b>6a</b>	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?. . . . .	<b>6a</b>		<b>No</b>
<b>b</b>	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?. . . . . If "Yes" to 6b, file Form 8870.	<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?	<b>7a</b>		<b>No</b>
<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?. . . . .	<b>8</b>		<b>No</b>

**Part VII 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
See Additional Data Table				

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

(a) Name and address of each employee paid more than \$50,000	(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
GABRIA L FISCHER-SHAY 555 MADISON AVENUE 18TH FLOOR NEW YORK, NY 100223300	EE 35.00	82,000	8,300	
IAN PHILP 555 MADISON AVENUE 18TH FLOOR NEW YORK, NY 100223300	EE 35.00	80,385		
SARAH E FRENCH 555 MADISON AVENUE 18TH FLOOR NEW YORK, NY 100223300	EE 35.00	111,130	11,200	
JEAN M ROSS 555 MADISON AVENUE 18TH FLOOR NEW YORK, NY 100223300	EE 35.00	150,661	15,194	

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
MINTZ LEVIN COHN FERRIS GLOVSKY & POPEO PC 666 THIRD AVENUE NEW YORK, NY 10017	LEGAL	45,914
PBR EXECUTIVES SEARCH 24 RABBIT HILL RD NEW PRESTON, CT 06777	CONSULTANT	60,000
LEON D ALPERN & CO 100 CROSSWAYS PK DR WEST 401 WOODBURY, NY 11797	ACCOUNTING	116,600
Total number of others receiving over \$50,000 for professional services. . . . . ▶		

**Part VIII-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 VIII-B Summary of Program-Related Investments (see instructions)**

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

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

**Part IX 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>	539,502,479
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	22,456,653
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	119,656,230
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	681,615,362
<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>	10,500,000
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	671,115,362
<b>4</b>	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	10,066,730
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. . . . .	<b>5</b>	661,048,632
<b>6</b>	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5. . . . .	<b>6</b>	33,052,432

**Part X 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 IX, line 6. . . . .	<b>1</b>	33,052,432
<b>2a</b>	Tax on investment income for 2021 from Part V, line 5. . . . .	<b>2a</b>	319,881
<b>b</b>	Income tax for 2021. (This does not include the tax from Part V.). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	319,881
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	32,732,551
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	32,732,551
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1. . . . .	<b>7</b>	32,732,551

**Part XI 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>	43,696,351
<b>b</b>	Program-related investments—total from Part VIII-B. . . . .	<b>1b</b>	
<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 XII, line 4. . . . .	<b>4</b>	43,696,351



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

	(a) Corpus	(b) Years prior to 2020	(c) 2020	(d) 2021
<b>1</b> Distributable amount for 2021 from Part X, line 7				32,732,551
<b>2</b> Undistributed income, if any, as of the end of 2021:				
<b>a</b> Enter amount for 2020 only. . . . .			5,392,657	
<b>b</b> Total for prior years: 20___, 20___, 20___				
<b>3</b> Excess distributions carryover, if any, to 2021:				
<b>a</b> From 2016. . . . .				
<b>b</b> From 2017. . . . .				
<b>c</b> From 2018. . . . .				
<b>d</b> From 2019. . . . .				
<b>e</b> From 2020. . . . .				
<b>f</b> <b>Total</b> of lines 3a through e. . . . .				
<b>4</b> Qualifying distributions for 2021 from Part XI, line 4: <b>▶</b> \$ <u>43,696,351</u>				
<b>a</b> Applied to 2020, but not more than line 2a			5,392,657	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2021 distributable amount. . . . .				32,732,551
<b>e</b> Remaining amount distributed out of corpus	5,571,143			
<b>5</b> Excess distributions carryover applied to 2021. (If an amount appears in column (d), the same amount must be shown in column (a).)				
<b>6</b> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	5,571,143			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b. . . . .				
<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. . . . .				
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions. . . . .				
<b>e</b> Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions. . . . .				
<b>f</b> Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2022. . . . .				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). . . . .				
<b>8</b> Excess distributions carryover from 2016 not applied on line 5 or line 7 (see instructions). . . . .				
<b>9</b> <b>Excess distributions carryover to 2022.</b> Subtract lines 7 and 8 from line 6a. . . . .	5,571,143			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2017. . . . .				
<b>b</b> Excess from 2018. . . . .				
<b>c</b> Excess from 2019. . . . .				
<b>d</b> Excess from 2020. . . . .				
<b>e</b> Excess from 2021. . . . .	5,571,143			

**Part XIII Private Operating Foundations** (see instructions and Part VI-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 2021, 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 IX for each year listed . . . . .

	Tax year	Prior 3 years			<b>(e) Total</b>
	<b>(a) 2021</b>	<b>(b) 2020</b>	<b>(c) 2019</b>	<b>(d) 2018</b>	
<b>b</b> 85% (0.85) of line 2a					
<b>c</b> Qualifying distributions from Part XI, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					

**3** Complete 3a, b, or c for the alternative test relied upon:

**a** "Assets" alternative test—enter:

**(1)** Value of all assets . . . . .

**(2)** Value of assets qualifying under section 4942(j)(3)(B)(i)

**b** "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed . . . . .

**c** "Support" alternative test—enter:

**(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .

**(2)** Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .

**(3)** Largest amount of support from an exempt organization

**(4)** Gross investment income

**Part XIV 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).)

ANNE SPITZER

**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.

ANNE SPITZER

**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

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

FUND MANAGERS  
555 MADISON AVE 18TH FLOOR  
NEW YORK, NY 100223300  
(212) 757-5462

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

DESCRIPTION OF CHARITABLE ORGANIZATION AND PURPOSE UNDER IRC SECTIONS 170(C), 2522(A) AND 2055(A).

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**c** Any submission deadlines:

NONE

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

THE TRUST MAKES CONTRIBUTIONS TO CORPORATIONS, ORGANIZATIONS, FOUNDATIONS, INSTITUTIONS OR FUNDS ORGANIZED AND OPERATED EXCLUSIVELY FOR RELIGIOUS, CHARITABLE, SCIENTIFIC, LITERARY OR EDUCATIONAL PURPOSES, WHICH ARE THEMSELVES QUALIFYING EXEMPT ORGANIZATIONS, PURSUANT TO ARTICLE 4(A) OF ITS CERTIFICATE OF INCORPORATION.

**Part XIV 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>				41,699,423
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> . . . . . ▶ <b>3b</b>				





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

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	5168 ALLEGIANT TRAVEL CO	P	2021-05-10	2021-07-13
1	27827 BARRICK GOLD CORP	P	2021-02-19	2021-07-13
	25300 CONCRETE PUMPING	P	2021-01-21	2021-07-13
	100000 EMX RTY CORP	P	2021-02-23	2021-07-13
	15000 EQT CORPORATION	P	2021-06-11	2021-07-13
	5000 GOLDMAN SACHS	P	2021-01-08	2021-07-13
	64399 NOV INC	P	2021-06-25	2021-07-13
	9938 NEWMONT CORP	P	2020-12-28	2021-07-13
	8000 PRECISION DRILLING CORP	P	2021-06-25	2021-07-14
	17889 SANDSTORM GOLD	P	2021-03-22	2021-07-13

**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)
980,280		828,577	151,703
588,816		488,337	100,479
201,153		120,934	80,219
292,432		317,435	-25,003
323,435		332,599	-9,164
89,824		90,550	-726
963,599		1,451,839	-488,240
629,501		481,876	147,625
308,405		310,408	-2,003
140,591		125,218	15,373

**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	
			151,703
			100,479
			80,219
			-25,003
			-9,164
			-726
			-488,240
			147,625
			-2,003
			15,373

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

List and describe the kind(s) of property sold (e.g., real estate, <b>(a)</b> 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo., day, yr.)	<b>(d)</b> Date sold (mo., day, yr.)
7500 VIASAT INC	P	2021-06-04	2021-07-13
1 894128.100 GOLUB CAP BDC INC	P	2020-05-15	2021-09-28
685079.900 GOLUB CAPITAL PARTNERS IV, LP	P	2016-08-12	2021-09-21
34600.000 GOLUB CAPITAL PARTNERS IV, LP	P	2018-01-29	2021-09-28
FRACTIONS ROC ABERDEEN STD GOLD	P	2021-07-01	2021-07-01
FRACTIONS ROC GOLDMAN SACHS	P	2021-07-01	2021-07-01
15000000 GOLUB CAP BDC NOTE	P	2020-09-29	2021-05-24
31405 ALLIANCE RESOURCE PARTNERS	P	2021-12-31	2021-07-13
39000 ALTIUS MINERALS CORP	P	2021-12-31	2021-07-13
65000 ANTERO RES CORP	P	2021-12-31	2021-07-13

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

<b>(e)</b> Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	<b>(g)</b> Cost or other basis plus expense of sale	<b>(h)</b> Gain or (loss) (e) plus (f) minus (g)
370,009		272,580	97,429
13,367,323		14,645,818	-1,278,495
10,242,276		11,221,609	-979,333
517,267		571,306	-54,039
6		6	
16		16	
15,598,200		14,988,000	610,200
235,832		131,219	104,613
512,903		506,521	6,382
951,417		362,546	588,871

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			<b>(l)</b> Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
<b>(i)</b> F.M.V. as of 12/31/69	<b>(j)</b> Adjusted basis as of 12/31/69	<b>(k)</b> Excess of col. (i) over col. (j), if any	
			97,429
			-1,278,495
			-979,333
			-54,039
			610,200
			104,613
			6,382
			588,871

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

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.)
100000 ANTERO MIDSTREAM CORP	P	2021-12-31	2021-07-13
1 20671 CAMECO CORP	P	2021-12-31	2021-07-13
15000 CINER RES LP	P	2021-12-31	2021-07-13
14453 CONCRETE PUMPING	P	2021-12-31	2021-07-13
46272 CONSOL ENERGY	P	2021-12-31	2021-07-13
13118 EOG RES INC	P	2021-12-31	2021-07-13
963 GOLDMAN SACHS	P	2021-12-31	2021-07-13
980422 GOLUB CAP BDC INC	P	2021-12-31	2021-09-28
676 MARTIN MARIETTA MATL	P	2021-12-31	2021-07-13
17000 PRECISION DRILLING CORP	P	2021-12-31	2021-07-14

**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)
1,006,383		580,168	426,215
367,141		242,471	124,670
206,666		330,115	-123,449
114,912		69,272	45,640
858,705		743,977	114,728
1,086,379		704,301	382,078
17,300		17,489	-189
14,657,234		13,465,146	1,192,088
238,424		140,016	98,408
688,634		659,600	29,034

**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	
			426,215
			124,670
			-123,449
			45,640
			114,728
			382,078
			-189
			1,192,088
			98,408
			29,034



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

List and describe the kind(s) of property sold (e.g., real estate, <b>(a)</b> 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo., day, yr.)	<b>(d)</b> Date sold (mo., day, yr.)
13913 SPROTT PHYSICAL GOLD TRUST	P	2021-12-31	2021-07-13
1 1000 TEXAS PAC LD	P	2021-12-31	2021-07-13
15159 VIASAT INC	P	2021-12-31	2021-07-13
39500 VISTA OUTDOOR INC	P	2021-12-31	2021-07-13
2783 ABERDEEN STD GOLD	P	2021-01-05	2021-07-13
NET SHORT TERM VARIOUS	P		2021-12-31
NET LONG TERM VARIOUS	P		2021-12-31
K-1 PASSTHRU NET L/T GAIN	P		2021-12-31
K-1 PASSTHRU SECTION 1231 GAIN	P		2021-12-31
K-1 PASSTHRU SEC 1256 SHORT TERM PORTION	P		2021-12-31

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

<b>(e)</b> Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	<b>(g)</b> Cost or other basis plus expense of sale	<b>(h)</b> Gain or (loss) (e) plus (f) minus (g)
198,398		188,411	9,987
1,532,955		695,276	837,679
747,862		609,834	138,028
1,609,055		521,826	1,087,229
48,230		50,632	-2,402
1,556,891			1,556,891
136,876			136,876
16,921,751			16,921,751
228			228
		7,178	-7,178

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			<b>(l)</b> Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
<b>(i)</b> F.M.V. as of 12/31/69	<b>(j)</b> Adjusted basis as of 12/31/69	<b>(k)</b> Excess of col. (i) over col. (j), if any	
			9,987
			837,679
			138,028
			1,087,229
			-2,402
			1,556,891
			136,876
			16,921,751
			228
			-7,178

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

List and describe the kind(s) of property sold (e.g., real estate, <b>(a)</b> 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo., day, yr.)	<b>(d)</b> Date sold (mo., day, yr.)
K-1 PASSTHRU SEC 1256 LONG TERM PORTION	P		2021-12-31
1 K-1 PASSTHRU NET SHORT TERM GAIN	P		2021-12-31

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

<b>(e)</b> Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	<b>(g)</b> Cost or other basis plus expense of sale	<b>(h)</b> Gain or (loss) (e) plus (f) minus (g)
		10,768	-10,768
214,006			214,006

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			<b>(l)</b> Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
<b>(i)</b> F.M.V. as of 12/31/69	<b>(j)</b> Adjusted basis as of 12/31/69	<b>(k)</b> Excess of col. (i) over col. (j), if any	
			-10,768
			214,006

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

<b>(a)</b> Name and address	Title, and average hours per week <b>(b)</b> devoted to position	<b>(c)</b> Compensation (If not paid, enter -0-)	<b>(d)</b> Contributions to employee benefit plans and deferred compensation	Expense account, <b>(e)</b> other allowances
EMILY SPITZER 555 MADISON AVE 18TH FL NEW YORK, NY 100223300	Trustee 1.00	0		
ANNE SPITZER 555 MADISON AVE 18TH FL NEW YORK, NY 100223300	Trustee 1.00	0		
DANIEL EVAN SPITZER 555 MADISON AVE 18TH FL NEW YORK, NY 100223300	Trustee 1.00	0		
ELIOT L SPITZER 555 MADISON AVE 18TH FL NEW YORK, NY 100223300	Trustee 1.00	0		
SARA C KAY 555 MADISON AVE 18TH FL NEW YORK, NY 100223300	CEO 35.00	507,412	37,771	
DANA C YOU 555 MADISON AVE 18TH FL NEW YORK, NY 100223300	COO 35.00	201,300	20,300	

**Form 990PF Part XIV 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 MUSEUM OF NATURAL HISTORY  200 CENTRAL PARK WEST NEW YORK, NY 10004	NONE	EXEMPT	GENERAL PURPOSE	220,000
EQUAL JUSTICE WORKS  1730 M ST NW SUITE 800 WASHINGTON, DC 20036	NONE	EXEMPT	GENERAL PURPOSE	10,000
JUVENILE DIABETES RESEARCH FOUNDATI  200 VESEY STREET 128TH FL NEW YORK, NY 10281	NONE	EXEMPT	GENERAL PURPOSE	300,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

**Form 990PF Part XIV 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 METROPOLITAN MUSEUM OF ART  1000 5TH AVENUE NEW YORK, NY 10028	NONE	EXEMPT	GENERAL PURPOSE	20,000
PUBLIC CITIZEN FOUNDATION  1600 20TH STREET NW WASHINGTON, DC 20009	NONE	EXEMPT	GOVERNMENT ACCOUNTABILITY AND REFORM	500,000
THE 21ST CENTURY FND CITY COLLEGE N  154 CONVENT AVENUE NEW YORK, NY 10031	NONE	EXEMPT	ANNE AND BERNARD SPITZER SCHOOL OF ARCHITECTURE	2,000,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

**Form 990PF Part XIV 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>				
SCENIC HUDSON  ONE CIVIC CENTER PLAZA SUITE 200 POUGHKEEPSIE, NY 12601	NONE	EXEMPT	GENERAL PURPOSE	25,000
GRAND STREET SETTLEMENT  80 PITT ST NEW YORK, NY 10002	NONE	EXEMPT	SECOND CENTURY CAPITAL CAMPAIGN	200,000
NEW YORK PUBLIC RADIO  160 VARICK STREET 9TH FL NEW YORK, NY 10013	NONE	EXEMPT	GENERAL PURPOSE	1,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

**Form 990PF Part XIV 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>				
PASSTHRU CONTRIBUTIONS FROM K-1  730 FIFTH AVE 2202 NEW YORK, NY 10019	NONE	EXEMPT	GENERAL PURPOSE	19,023
RABBI JACOB JOSEPH SCHOOL  1 PLAINFIELD AVENUE EDISON, NJ 08817	NONE	EXEMPT	BOBBIE'S PLACE	100,000
US-AFRICA CHILDREN'S FELLOWSHIP  475 14TH STREET BROOKLYN, NY 11215	NONE	EXEMPT	GENERAL PURPOSE	20,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

**Form 990PF Part XIV 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>				
UNITED HOSPITAL FUND  1411 BROADWAY 12TH FL NEW YORK, NY 10118	NONE	EXEMPT	GENERAL PURPOSE	2,500
UNION SETTLEMENT ASSOCIATION  237 EAST 104TH ST NEW YORK, NY 10029	NONE	EXEMPT	GENERAL PURPOSE	100,000
ALLIANCE FOR JUSTICE  11 DUPONT CIRCLE NW STE 500 WASHINGTON, DC 20036	NONE	EXEMPT	JUSTICE PROGRAM	150,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423



**Form 990PF Part XIV 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>				
ANOTHER STEP  706 EXECUTIVE BLVD VALLEY COTTAGE, NY 10989	NONE	EXEMPT	GENERAL PURPOSE	50,000
REPRIEVE US  PO BOX 3657 NEW YORK, NY 10174	NONE	EXEMPT	GENERAL PURPOSE	250,000
BREAD FOR THE CITY  1525 SEVENTH STREET NW WASHINGTON, DC 20001	NONE	EXEMPT	GENERAL PURPOSE	25,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

**Form 990PF Part XIV 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>				
DOCTORS WITHOUT BORDERS USA  40 RECTOR STREET 16TH FL NEW YORK, NY 10006	NONE	EXEMPT	GENERAL PURPOSE	1,000
EARTHJUSTICE  50 CALIFORNIA ST SUITE 500 SAN FRANCISCO, CA 94111	NONE	EXEMPT	FARMING FOR THE FUTURE	500,000
EARTHWATCH INSTITUTE  1380 SOLDIERS FIELD RD STE 2700 BOSTON, MA 02135	NONE	EXEMPT	GENERAL PURPOSE	15,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

**Form 990PF Part XIV 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>				
FOOD BANK OF THE HUDSON VALLEY  965 ALBANY-SHAKER ROAD LATHAM, NY 12110	NONE	EXEMPT	GENERAL PURPOSE	20,000
JAWONIO FOUNDATION  260 NORTH LITTLE TOR RD NEW CITY, NY 10956	NONE	EXEMPT	GENERAL PURPOSE	3,600
JCC ROCKLAND  450 W NYACK RD WEST NYACK, NY 10994	NONE	EXEMPT	GENERAL PURPOSE	18,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

**Form 990PF Part XIV 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>				
MEALS ON WHEELS PROG SVCS ROCKLAND  121 W NYACK RD NANUET, NY 10954	NONE	EXEMPT	GENERAL PURPOSE	25,000
NATIONAL MULTIPLE SCLEROSIS SOCIETY  733 3RD AVE NEW YORK, NY 10017	NONE	EXEMPT	FOR THE NYC - SOUTHERN NEW YORK CHAPTER	10,000
THE AMERICAN FDN FOR SUICIDE PREVEN  199 WATER STREET 11TH FLOOR NEWYORK, NY 10038	NONE	EXEMPT	GENERAL PURPOSE	10,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

**Form 990PF Part XIV 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>				
VIOLENCE POLICY CENTER 1025 CONNECTICUT AVE NW SUITE 1210 WASHINGTON, DC 20036	NONE	EXEMPT	GENERAL PURPOSE	20,000
WASHINGTON LEGAL CLINIC FOR THE HOM 1200 U ST NW 3 3RD FLOOR WASHINGTON, DC 20009	NONE	EXEMPT	GENERAL PURPOSE	400,000
WORLD WILDLIFE FUND 1250 24TH ST NW WASHINGTON, DC 20037	NONE	EXEMPT	GENERAL PURPOSE	25,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

**Form 990PF Part XIV 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>				
AIDS WALK RUN BOSTON  175 AMORY STREET BOSTON, MA 02119	NONE	EXEMPT	GENERAL PURPOSE	15,000
BROOKLYN GREENWAY INITIATIVE  19 MORRIS AVENUE BLDG 128 BROOKLYN, NY 11205	NONE	EXEMPT	GENERAL PURPOSE	5,000
CHAI LIFELINE  151 WEST 30TH STREET 3RD FLOOR NEW YORK, NY 10001	NONE	EXEMPT	GENERAL PURPOSE	36,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

**Form 990PF Part XIV 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>				
CORAL REEF ALLIANCE  548 MARKET ST STE 29802 SAN FRANCISCO, CA 94104	NONE	EXEMPT	GENERAL PURPOSE	5,000
DC CENTRAL KITCHEN  425 2ND STREET NW WASHINGTON, DC 20001	NONE	EXEMPT	CAPITAL CAMPAIGN	25,000
IMMIGRANT JUSTICE CORPS  17 BATTERY PLACE SUITE 1234 NEW YORK, NY 10004	NONE	EXEMPT	GENERAL PURPOSE	500,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
INTERNATIONAL RESCUE COMMITTEE  122 EAST 42ND STREET NEW YORK, NY 10168	NONE	EXEMPT	GENERAL PURPOSE	25,000
MARTHA'S TABLE  2375 EVANS RD SE WASHINGTON, DC 20020	NONE	EXEMPT	GENERAL PURPOSE	25,000
MIDDLEBURY COLLEGE  14 OLD CHAPEL RD MIDDLEBURY, VT 05753	NONE	EXEMPT	GENERAL PURPOSE	10,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423



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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
OCEAN CONSERVANCY  1300 19TH STREET NW 8TH FL WASHINGTON, DC 20036	NONE	EXEMPT	GENERAL PURPOSE	10,000
PROTEUS FUND  15 RESEARCH DRIVE SUITE B AMHERST, MA 01002	NONE	EXEMPT	PIPER FUND	400,000
REEF ENVIROMENTAL EDUCATION FOUNDAT  PO BOX 370246 KEY LARGO, FL 33037	NONE	EXEMPT	GENERAL PURPOSE	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
THE MICHAEL J FOX FDN FOR PARKINSON  GRAND CENTRAL STATION PO BOX 4777 NEW YORK, NY 10163	NONE	EXEMPT	GENERAL PURPOSE	200,000
THE OCEAN FOUNDATION  1320 19TH STREET NW 5TH FL WASHINGTON, DC 20036	NONE	EXEMPT	GENERAL PURPOSE	5,000
THE REFORM TEMPLE OF ROCKLAND  330 N HIGHLAND AVENUE UPPER NYACK, NY 10960	NONE	EXEMPT	GENERAL PURPOSE	10,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
REGENT OF THE UNIV OF CAL AT SAN DI  9500 GILMAN DR LA JOLLA, CA 92093	NONE	EXEMPT	SPINAL CORD INJURY RESEARCH PROGRAM	242,000
WARRIOR-SCHOLAR PROJECT  1012 14TH STREET NW STE 1200 WASHINGTON, DC 20005	NONE	EXEMPT	GENERAL PURPOSE	5,000
WASH LAWY CMTE FOR CIVIL RTS URB AF  700 14TH ST NW STE 400 WASHINGTON, DC 20005	NONE	EXEMPT	GENERAL PURPOSE	25,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
AMERICAN CAMP ASSOCIATION  5000 STATE ROAD 67 NORTH MARTINSVILLE, IN 46151	NONE	EXEMPT	CAMP LEE MAR	2,500
THE AMERICAN CONSTITUTION SOCIETY  1899 L STREET NW 2ND FLOOR WASHINGTON, DC 20036	NONE	EXEMPT	GENERAL PURPOSE	500,000
BIPARTISAN POLICY CENTER  1225 EYE STREET NW SUITE 1000 WASHINGTON, DC 20005	NONE	EXEMPT	DECARBONIZATION, CLEAN INFRASTRUCTURE AND ENVIRONMENTAL EQUITY PROJECT - \$550,000	550,000
<b>Total . . . . .</b>				<b>41,699,423</b>

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CENTER ON BUDGET AND POLICY PRIORIT  1275 FIRST ST NE STE 1200 WASHINGTON, DC 20002	NONE	EXEMPT	GENERAL PURPOSE AND STATE PRIORITIES PARTNERSHIP	2,001,000
CENTER FOR CLIMATE AND ENERGY SOLUT  3100 CLARENDON BLVD SUITE 800 ARLINGTON, VA 22201	NONE	EXEMPT	CLIMATE INNOVATION 2050	500,000
CITIZENS FOR RESPONS AND ETHICS IN  1331 F ST NW STE 900 WASHINGTON, DC 20004	NONE	EXEMPT	GENERAL PURPOSE	500,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CLEAN AIR TASK FORCE 114 STATE STREET 6TH FLOOR BOSTON, MA 02109	NONE	EXEMPT	CLEAN ENERGY STANDARDS - \$500,000 STATE CES WORK AND GENERAL PURPOSE - \$500,000	1,000,000
COMMUNITY CATALYST ONE FEDERAL STREET 5TH FLOOR BOSTON, MA 02110	NONE	EXEMPT	COVERAGE SAFETY NET PROJECT	750,000
CONSERVATION INTERNATIONAL 2011 CRYSTAL DRIVE SUITE 500 ARLINGTON, VA 22202	NONE	EXEMPT	RESCUE (RETETI ELEPHANT SANCTUARY)	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CONSTITUTIONAL ACCOUNTABILITY CENTE  1200 18TH STREET NW SUITE 501 WASHINGTON, DC 20036	NONE	EXEMPT	GENERAL PURPOSE	500,000
DENNIS P MCHUGH PIERMONT PUBLIC LIB  25 FLYWHEEL PARK WEST PIERMONT, NY 10968	NONE	EXEMPT	GENERAL PURPOSE	10,000
ENERGY INNOVATION REFORM PROJECT  2433 N KENMORE ST ARLINGTON, VA 22207	NONE	EXEMPT	GENERAL PURPOSE	500,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
ENERGY OPTIONS NETWORK  120 LAKE VIEW AVE CAMBRIDGE, MA 02138	NONE	EXEMPT	GENERAL PURPOSE	500,000
GREAT PLAINS INST FOR SUSTAINABLE D  2801 21ST AVE S SUITE 220 MINNEAPOLIS, MN 55407	NONE	EXEMPT	GENERAL PURPOSE	600,000
HUMANE RESCUE ALLIANCE  71 OGLETHORPE ST NW WASHINGTON, DC 20011	NONE	EXEMPT	GENERAL PURPOSE	5,000
<b>Total . . . . . ▶ 3a</b>				41,699,423



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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
INFORMATION TECH AND INNOVATION FDN  700 K STREET NW STE 600 WASHINGTON, DC 20001	NONE	EXEMPT	CLEAN ENERGY INNOVATION POLICY PROJECT	450,000
INTERIM HOUSE INC  333 WEST UPSAL STREET PHILADELPHIA, PA 19119	NONE	EXEMPT	GENERAL PURPOSE	2,000
KEEP ROCKLAND BEAUTIFUL  120-126 NORTH MAIN ST 2ND FL ANNEX NEW CITY, NY 10956	NONE	EXEMPT	GENERAL PURPOSE	5,000
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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
LEGAL AID SOCIETY OF DC 1331 H STREET NW STE 350 WASHINGTON, DC 20005	NONE	EXEMPT	GENERAL PURPOSE	25,000
MAZON A JEWISH RESPONSE TO HUNGER 10850 WILSHIRE BLVD SUITE 400 LOS ANGELES, CA 90024	NONE	EXEMPT	GENERAL PURPOSE	20,000
NATIONAL IMMIGRATION LAW CENTER 3450 WILSHIRE BLVD STE 108-62 LOS ANGELES, CA 90010	NONE	EXEMPT	GENERAL PURPOSE	600,000
<b>Total . . . . .</b>				<b>▶ 3a</b> 41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
NATIONAL SECURITY ARCHIVE FUND  2130 H STREET NW STE 701 WASHINGTON, DC 20037	NONE	EXEMPT	GENERAL PURPOSE	300,000
NATIONAL WOMEN'S LAW CENTER  11 DUPONT CIRCLE NW 800 WASHINGTON, DC 20036	NONE	EXEMPT	ADVANCING ECONOMIC JUSTICE	350,000
NEO PHILANTHROPY  45 W 36TH STREET 6TH FLOOR NEW YORK, NY 10018	NONE	EXEMPT	STATE INFRASTRUCTURE FUND - \$1,500,000	1,500,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
NY PUBLIC INTEREST RESEARCH GROUP F  9 MURRAY STREET LOWER LEVEL NEW YORK, NY 10007	NONE	EXEMPT	GENERAL PURPOSE	25,000
NEW YORK UNIVERSITY  22 WASHINGTON SQUARE NORTH NEW YORK, NY 10011	NONE	EXEMPT	INSTITUTE FOR POLICY INTEGRITY SUPPORTING STRONG ENVIRONMENTAL SAFEGUARDS - \$350,000 TAX LAW CENTER - \$500,000	850,000
NEXT FOR AUTISM  1177 AVENUE OF THE AMERICAS 5TH FL NEW YORK, NY 10036	NONE	EXEMPT	GENERAL PURPOSE	30,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
NORTH BROOKLYN ANGELS  127 KENT ST BROOKLYN, NY 11222	NONE	EXEMPT	GENERAL PURPOSE	5,000
MONTEFIORE NYACK HOSPITAL FOUNDATIO  160 N MIDLAND AVE NYACK, NY 10960	NONE	EXEMPT	GENERAL PURPOSE	25,000
PENGUIN PLAYERS LTD  PO BOX 91 STONY POINT, NY 10980	NONE	EXEMPT	GENERAL PURPOSE	10,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
PROJECT ON GOVERNMENT OVERSIGHT  1100 13TH STREET STE 800 WASHINGTON, DC 20005	NONE	EXEMPT	GENERAL PURPOSE	600,000
THE BREAKTHROUGH INSTITUTE  436 14TH STREET SUITE 820 OAKLAND, CA 94612	NONE	EXEMPT	FOOD & FARMING PROGRAM - \$400,000 GENERAL PURPOSE - \$500,000	900,000
THE LEADERSHIP CONFERENCE EDUCATION  1620 L STREET NW SUITE 1100 WASHINGTON, DC 20036	NONE	EXEMPT	GENERAL PURPOSE	800,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
THE LUNCHBOX FUND  PO BOX 10 NEW YORK, NY 10276	NONE	EXEMPT	GENERAL PURPOSE	10,000
PROTECT DEMOCRACY PROJECT  2020 PENNSYLVANIA AVE NW 163 WASHINGTON, DC 20006	NONE	EXEMPT	GENERAL PURPOSE	500,000
THE RICHARDSON CTR FOR GLOBAL ENGAG  216 WASHINGTON AVE SUITES 1 2 SANTA FE, NM 87501	NONE	EXEMPT	GENERAL PURPOSE	25,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
THICH NHAT HANH FOUNDATION  2499 MELRU LANE ESCONDIDO, CA 92026	NONE	EXEMPT	GENERAL PURPOSE	20,000
THIRD WAY INSTITUTE  1025 CONNECTICUT AVE NW SUITE 400 WASHINGTON, DC 20036	NONE	EXEMPT	CLIMATE AND CLEAN ENERGY INNOVATION CAMPAIGN	500,000
TZEDEK DC  4340 CONNECTICUT AVE NW WASHINGTON, DC 20008	NONE	EXEMPT	GENERAL PURPOSE	9,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423



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WHEDCO  50 EAST 168TH STREET BRONX, NY 10452	NONE	EXEMPT	GENERAL PURPOSE	6,000
WORLD RESOURCES INSTITUTE  10 G STREET NE SUITE 800 WASHINGTON, DC 20002	NONE	EXEMPT	DEEP DECARBONIZATION AND CARBON CAPTURE PROJECT	550,000
ACTIVATE GLOBAL INC  2600 10TH ST STE 300 Berkeley, CA 94710	NONE	EXEMPT	GENERAL PURPOSE	300,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
AMERICAN OVERSIGHT  1030 15th St NW Washington, DC 20005	NONE	EXEMPT	GENERAL PURPOSE	400,000
ARLINGTON FOOD ASSISTANCE CENTER  PO BOX 6261 Arlington, VA 22206	NONE	EXEMPT	GENERAL PURPOSE	2,000
BROOKLYN ACADEMY OF MUSIC INC  30 Lafayette Ave Brooklyn, NY 11217	NONE	EXEMPT	GENERAL PURPOSE	10,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CAIR COALITION  1025 CONNECTICUT AVE NW STE 701 Washington, DC 20006	NONE	EXEMPT	GENERAL PURPOSE	10,000
CENTER FOR LAW SOCIAL POLICY  1310 L STREET NW STE 900 Washington, DC 20005	NONE	EXEMPT	ADVANCING STRATEGIES TO ALIGN PROGRAMS AND PROTECTING IMMIGRANT FAMILIES CAMPAIGN	377,500
CHURCHES UNITED FOR FAIR HOUSING  7 Marcus Garvey Blvd Brooklyn, NY 11206	NONE	EXEMPT	GENERAL PURPOSE	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
COMMITTEE TO PROTECT JOURNALISTS  330 7th Ave 11 New York, NY 10001	NONE	EXEMPT	GENERAL PURPOSE	25,000
ENVIRONMENTAL AND ENERGY STUDY INST  1020 19th Street NW Suite 400 Washington, DC 20036	NONE	EXEMPT	GENERAL PURPOSE	300,000
ENVIRONMENTAL DEFENSE FUND  257 PARK AVE 16TH FL New York, NY 10010	NONE	EXEMPT	INNOVATION PROJECT	250,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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<b>a</b> <i>Paid during the year</i>				
GALAPAGOS CONSERVANCY  11150 Fairfax Blvd 408 Fairfax, VA 22030	NONE	EXEMPT	GENERAL PURPOSE	5,000
GIFFORDS LAW CENTER TO PREVENT GUN  268 Bush Street 555 San Francisco, CA 94104	NONE	EXEMPT	GENERAL PURPOSE	25,000
HUMAN RIGHTS FIRST  75 Broad St 31st Floor New York, NY 10004	NONE	EXEMPT	GENERAL PURPOSE	10,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
INTERNATIONAL ANTI-POACHING FOUNDAT  1655 N Fort Myer Drive 700 Arlington, VA 22209	NONE	EXEMPT	GENERAL PURPOSE	15,000
KELLERMANN FOUNDATION  PO Box 832809 Richardson, TX 75083	NONE	EXEMPT	BWINDI COMMUNITY HOSPITAL - \$50,000 KISHANDA SCHOOL - \$90,000	140,000
LEWA WILDLIFE CONSERVANCY USA  38 MILLER AVE 507 MILL VALLEY, CA 94941	NONE	EXEMPT	GENERAL PURPOSE	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
NUCLEAR INNOVATION ALLIANCE  56 OLIVER DR BREWSYTER, MA 02631	NONE	EXEMPT	GOOD ENERGY COLLECTIVE	850,000
PANTHERA  8 W 40th St 18th Floor New York, NY 10018	NONE	EXEMPT	GENERAL PURPOSE	5,000
REPORTERS COMM FOR FREEDOM OF THE P  1156 15th St NW STE 1020 Washington, DC 20005	NONE	EXEMPT	GENERAL PURPOSE	25,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
SIERRA CLUB FOUNDATION  2101 Webster St 1250 Oakland, CA 94612	NONE	EXEMPT	GENERAL PURPOSE	10,000
THE ARC FOUNDATION OF ROCKLAND INC  210 ROUTE 303 VALLEY COTTAGE, NY 10989	NONE	EXEMPT	GENERAL PURPOSE	150,000
THE GERMAN MARSHALL FUND OF THE US  1744 E STREET NW Washington, DC 20009	NONE	EXEMPT	ALLIANCE FOR SECURING DEMOCRACY	500,000
<b>Total . . . . . ▶ 3a</b>				41,699,423



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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
THE HOPEWELL FUND  1828 L ST NW STE 300d Washington, DC 20036	NONE	EXEMPT	ARTICLE V PUBLIC EDUCATION CAMPAIGN	250,000
THE NATIONAL HEALTH LAW PROGRAM INC  3701 WILSHIRE BLVD LOS ANGELES, CA 90010	NONE	EXEMPT	INTERNSHIP - \$30,000MAINTAINING AND EXPANDING MEDICAID AND THE ACA - \$750,000	780,000
WILLIAMS J BRENNAN JR CNTR FOR JUST  120 Broadway 1750 New York, NY 10271	NONE	EXEMPT	GENERAL PURPOSE	50,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
AMERICAN FLOOD COALITION  1501 M ST NW SUITE 430 WASHINGTON, DC 20005	NONE	EXEMPT	GENERAL PURPOSE	270,000
ARIZONA COMMUNITY FOUNDATION  2201 E CAMELBACK RD 405B PHOENIX, AZ 85016	NONE	EXEMPT	EITC POOLED FUND	300,000
BROOKLYN HOSPITAL FOUNDATION INC  121 DEKALB AVENUE BROOKLYN, NY 11201	NONE	EXEMPT	COVID-19 FUND	1,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CAMPAIGN LEGAL CENTER INC  1101 14TH ST NW 400 WASHINGTON, DC 20005	NONE	EXEMPT	GENERAL PURPOSE	225,000
CARBON 180  1140 3RD ST NE WASHINGTON, DC 20002	NONE	EXEMPT	GENERAL PURPOSE	300,000
CENTER FOR ELECTION INNOVATION RESE  1120 CONNECTICUT AVE NW STE 1040 WASHINGTON, DC 20036	NONE	EXEMPT	GENERAL PURPOSE	300,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CENTER FOR POPULAR DEMOCRACY  449 TROUTMAN ST STE A BROOKLYN, NY 11237	NONE	EXEMPT	FAMILY ECONOMIC SECURITY	500,000
CLIMATEWORKS FOUNDATION  235 MONTGOMERY ST 13TH FL SAN FRANCISCO, CA 94104	NONE	EXEMPT	CARBON DIOXIDE REMOVAL FUND	1,000,000
ECONOMIC POLICY INSTITUTE  1225 I ST NW 600 WASHINGTON, DC 20005	NONE	EXEMPT	GENERAL PURPOSE AND LABOR STANDARDS ENFORCEMENT PROJECT	650,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
EDUCATION BRIDGE  2043 SOUTH BEND AVENUE 278 SOUTH BEND, IN 46637	NONE	EXEMPT	GENERAL PURPOSE	6,000
ELEPHANT COOPERATION  110 E AVENIDA PALIZADA 301 SAN CLEMENTE, CA 92672	NONE	EXEMPT	COMMUNITY COMMERCE & SUSTAINABILITY - COMACO	5,000
GEORGETOWN UNIVERSITY  600 NEW JERSEY AVE NW WASHINGTON, DC 20001	NONE	EXEMPT	INSTITUTE FOR CONSTITUTIONAL ADVOCACY AND PROTECTION ANTI MILITIA INITIATIVE - \$150,000GEORGETOWN LAW SCHOOL - \$10,000	160,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
INSTITUTE FOR NONPROFIT NEWS  8549 WILSHIRE BLVD 2294 BEVERLY HILLS, CA 90211	NONE	EXEMPT	GENERAL PURPOSE	400,000
KEYSTONE RESEARCH CENTER  412 N 3RD ST HARRISBURG, PA 17101	NONE	EXEMPT	PA BUDGET & POLICY CENTER WE THE PEOPLE PROJECT	137,500
LAWYERS ALLIANCE FOR NEW YORK  171 MADISON AVE 9TH FL NEW YORK, NY 10016	NONE	EXEMPT	GENERAL PURPOSE	15,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

**Form 990PF Part XIV 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>				
LEAGUE OF WOMEN VOTERS EDUCATION FU  1233 20TH ST NW STE 500 WASHINGTON, DC 20036	NONE	EXEMPT	GENERAL PURPOSE	400,000
LEGAL AID CHICAGO  120 S LASALLE ST STE 900 CHICAGO, IL 60603	NONE	EXEMPT	GENERAL PURPOSE	25,000
MICHIGAN LEAGUE FOR PUBLIC POLICY  1223 TURNER RD G1 LANSING, MI 48906	NONE	EXEMPT	ECONOMIC JUSTICE PROJECT	125,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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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 JEWISH HEALTH  10 E 102ND ST NEW YORK, NY 10029	NONE	EXEMPT	GENERAL PURPOSE	10,000
NEW VENTURE FUND  1828 L STREET NW STE 300a WASHINGTON, DC 20036	NONE	EXEMPT	GROUNDWORK COLLABORATIVE - \$500,000 FAIR REPRESENTATION IN REDISTRICTING INITIATIVE - \$600,000 TRUSTED ELECTIONS FUND - \$795,000	1,895,000
SHELDRIK WILDLIFE TRUST USA  25283 CABOT RD STE 101 LAGUNA HILLS, CA 92653	NONE	EXEMPT	GENERAL PURPOSE	5,000
<b>Total . . . . . ▶ 3a</b>				41,699,423



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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
SOUTHERN COALITION FOR SOCIAL JUSTI  1415 W NORTH CAROLINA HWY54 STE 101 DURHAM, NC 27707	NONE	EXEMPT	REDISTRICTING PROGRAM	400,000
SPECIAL OLYMPICS INC  1133 19TH ST NW 12TH FL WASHINGTON, DC 20036	NONE	EXEMPT	SPECIAL OLYMPICS EMERGENCY RELIEF FUND	10,000
THE COMMONWEALTH INST FOR FISCAL AN  1329 E CARY ST 200 RICHMOND, VA 23219	NONE	EXEMPT	GENERAL PURPOSE	150,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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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 ENERGY FOR GROWTH HUB  1015 15TH STREET NW 6TH FLOOR WASHINGTON, DC 20005	NONE	EXEMPT	GENERAL PURPOSE	500,000
THE MIAMI FOUNDATION  40 NW 3RD ST 305 MIAMI, FL 33128	NONE	EXEMPT	NEWSMATCH	250,000
TRUSTEES OF COLUMBIA UNIVERSITY IN  1255 AMSTERDAM AVE NEW YORK, NY 10027	NONE	EXEMPT	LAMONT-DOHERTY'S HUDSON RIVER FIELD STATION - \$50,000 CGEP NUCLEAR AND CARBON MGMT PROJECT - \$400,00	450,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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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 INSTITUTE  500 LENFANT PLAZA SW WASHINGTON, DC 20024	NONE	EXEMPT	HEALTH POLICY CENTER - \$500,000 INFORMING TAX POLICY DEBATES WIT IMPROVED ANALYSIS - \$280,000	780,000
WASHINGTON CENTER FOR EQUITABLE GRO  1156 15TH ST NW WASHINGTON, DC 20005	NONE	EXEMPT	GENERAL PURPOSE	500,000
WORLD CENTRAL KITCHEN INC  1342 FLORIDA AVE NW WASHINGTON, DC 20009	NONE	EXEMPT	GENERAL PURPOSE	51,000
<b>Total . . . . .</b>				41,699,423

**Form 990PF Part XIV 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>				
CENTER FOR AMERICAN PROGRESS 1333 H STREET NW SUITE 100-E WASHINGTON, DC 20005	NONE	EXEMPT	RESILIENT ECONOMY PROJECT	300,000
CITYDANCE INC 4000 ALBEMARLE ST NW 304 WASHINGTON, DC 20016	NONE	EXEMPT	GENERAL PURPOSE	10,000
COMMON CAUSE EDUCATION FUND 805 15TH STREET NW 8TH FLOOR WASHINGTON, DC 20005	NONE	EXEMPT	GENERAL PURPOSE	500,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

**Form 990PF Part XIV 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 EMPLOYMENT LAW PROJECT  90 BROAD ST SUITE 1100 NEW YORK, NY 10004	NONE	EXEMPT	GENERAL PURPOSE AND LABOR STANDARDS ENFORCEMENT PROJECT	625,000
RESOURCES FOR THE FUTURE  1616 P ST NW SUITE 600 WASHINGTON, DC 20036	NONE	EXEMPT	GERNERAL PURPOSE	400,000
GEORGIA COALITION FOR THE PEOPLES A  501 PULLIAM ST SW 410 ATLANTA, GA 30312	NONE	EXEMPT	GENERAL PURPOSE	25,000
<b>Total . . . . .</b>				▶ <b>3a</b> 41,699,423

**Form 990PF Part XIV 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 NATURE CONSERVANCY 4245 NORTH FAIRFAX DRIVE SUITE 100 ARLINGTON, VA 22203	NONE	EXEMPT	POWER OF PLACE EXPANSION	500,000
THE STISSING CENTER PO BOX 1024 PINE PLAINS, NY 12567	NONE	EXEMPT	GENERAL PURPOSE	125,000
TOWARDS JUSTICE 2840 FAIRFAX STREET SUITE 220 DENVER, CO 80207	NONE	EXEMPT	GENERAL PURPOSE	200,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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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>				
AMALGAMATED CHARITABLE FOUNDATION  1825 K STREET NW WASHINGTON, DC 20006	NONE	EXEMPT	FAMILIES AND WORKERS FUND	600,000
ASIAN AMERICAN FEDERATION INC  120 Wall St 9th Floor NEW YORK, NY 10005	NONE	EXEMPT	COVID-19 RECOVERY FUND	1,000
CALIFORNIA BUDGET POLICY CENTER  1107 9TH STREET SUITE 310 SACRAMENTO, CA 95814	NONE	EXEMPT	GENERAL PURPOSE	1,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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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>				
CENTER FOR CIVIC DESIGN INC 5443 TATES BANK RD CAMBRIDGE, MD 21613	NONE	EXEMPT	GENERAL PURPOSE	150,000
CENTER FOR TECHNOLOGY AND CIVIC 233 N MICHIGAN AVE STE 1800 CHICAGO, IL 60601	NONE	EXEMPT	GENERAL PURPOSE	400,000
CODE FOR AMERICA 972 MISSION ST 5TH FLOOR SAN FRANCISCO, CA 94103	NONE	EXEMPT	TAX BENEFITS PROGRAM	225,000
<b>Total . . . . . ▶ 3a</b>				41,699,423



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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
COMMUNITY HELP IN PARK SLOPE  200 4TH AVE BROOKLYN, NY 11217	NONE	EXEMPT	GENERAL PURPOSE	1,000
DOG TAG INC  3206 GRACE ST NW WASHINGTON, DC 20007	NONE	EXEMPT	GENERAL PURPOSE	1,000
FIRST BOOK  1319 F ST NW SUITE 1000 WASHINGTON, DC 20004	NONE	EXEMPT	GENERAL PURPOSE	1,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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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>				
FRIENDS OF STISSING LANDMARKS INC  PO BOX 37 PINE PLAINS, NY 12567	NONE	EXEMPT	GENERAL PURPOSE	1,000
HARLEM VALLEY RAIL TRAIL ASSOCIATIO  PO BOX 356 MILLERTON, NY 12546	NONE	EXEMPT	GENERAL PURPOSE	25,000
HUDSON COUNTY COMMUNITY COLL FOUND  70 SIP AVE JERSEY CITY, NJ 07306	NONE	EXEMPT	HCC SCHOLARSHIP	4,800
<b>Total . . . . . ▶ 3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
JEWISH COMMUNITY RELATIONS CO OF NY  520 EIGHTH AVE SUITE 1400 NEW YORK, NY 10018	NONE	EXEMPT	GENERAL PURPOSE	5,000
LIFEBOX FOUNDATION INC  195 MONTAGUE ST 14TH FLOOR BROOKLYN, NY 11201	NONE	EXEMPT	GENERAL PURPOSE	50,000
MOMSRISING EDUCATION FUND  12011 BEL-RED ROAD SUITE 100B BELLEVUE, WA 98005	NONE	EXEMPT	BUILDING PUBLIC WILL FOR ECONOMIC SECURITY POLICIES FOR FAMILIES	200,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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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 INDEPENDENT VENUE FOUNDATI  1 PENN PLAZA 6263 NEW YORK, NY 10119	NONE	EXEMPT	GENERAL PURPOSE	1,000
NEW YORK - NEW JERSEY TRAIL CONFERE  600 RAMAPO VALLEY RD MAHWAH, NJ 07430	NONE	EXEMPT	GENERAL PURPOSE	25,000
PRATT AREA COMMUNITY COUNCIL INC  1000 DEAN STREET STE 420 BROOKLYN, NY 11238	NONE	EXEMPT	GENERAL PURPOSE	1,000
<b>Total . . . . . ▶ 3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
PROSPECT PARK ALLIANCE INC  95 PROSPECT PARK WEST BROOKLYN, NY 11215	NONE	EXEMPT	GENERAL PURPOSE	1,000
PUBLIC PRIVATE STRATEGIES INSTITUTE  700 PENNSYLVANIA AVE SE 2ND FL WASHINGTON, DC 20003	NONE	EXEMPT	ENGAGING BUSINESS VOICES IN SUPPORT OF EQUITABLE POLICIES	200,000
RESULTS EDUCATIONAL FUND  1101 15TH ST NW WASHINGTON, DC 20005	NONE	EXEMPT	BUILDING LEADERSHIP FOR ANTI-POVERTY INVESTMENT	150,000
<b>Total . . . . .</b>				41,699,423

▶ 3a

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
SCHUYLER CENTER FOR ANALYSIS ADVOCA  540 BROADWAY ALBANY, NY 12207	NONE	EXEMPT	GENERAL PURPOSE	1,000
THE OCTAVIA PROJECT  PO BOX 381031 BROOKLYN, NY 11238	NONE	EXEMPT	GENERAL PURPOSE	1,000
THE PHILLIPS COLLECTION  1600 21ST STREET NW WASHINGTON, DC 20009	NONE	EXEMPT	ANNUAL FUND	1,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
THE SARARA FOUNDATION  1031 33RD STREET DENVER, CO 80205	NONE	EXEMPT	RETITI ELEPHANT SANCTUARY	5,000
TRANSFORMATIVE JUSTICE COALITION  1816 12TH ST NW STE 410 WASHINGTON, DC 20009	NONE	EXEMPT	GENERAL PURPOSE	10,000
UNIVERSITY OF CALIFORNIA BERKELEY F  1995 UNIVERSITY AVE STE 410 BERKELEY, CA 94704	NONE	EXEMPT	SUSAN RASKY SCHOLARSHIP FUND FOR JOURNALISTIC EXCELLENCE	1,000
<b>Total . . . . .</b>				▶ <b>3a</b> 41,699,423

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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>				
IOBY  PO BOX 4668 74253 NEW YORK, NY 10163	NONE	EXEMPT	BED-STUY STRONG'S MUTUAL AID COMMUNITY FUND - \$1,000 CLINTON HILL FORT GREENE MUTUAL AID - \$2,000	3,000
<b>Total . . . . .</b> ▶ <b>3a</b>				41,699,423



**TY 2021 Accounting Fees Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
ACCOUNTING	116,600	116,600	0	0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

## TY 2021 Depreciation Schedule

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

### Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
COMMERCIAL BUILDING	2011-12-21	12,677,652	2,939,125	SL	2.56 %	325,055	325,055		
IMPROVEMENTS	2011-12-21	269,272	170,519	SL	6.67 %	17,960	17,960		
IMPROVEMENTS	2012-07-01	5,592	1,200	SL	2.56 %	143	143		
ADDL AQUISITION COSTS	2012-01-01	764	179	SL	2.56 %	20	20		
IMPROVEMENTS	2013-10-01	40,732	19,345	SL	15.0000	2,715	2,715		
IMPROVEMENTS	2013-10-01	31,131	5,753	SL	2.56 %	798	798		
IMPROVEMENTS	2013-04-29	5,980	1,173	SL	2.56 %	153	153		
IMPROVEMENTS	2013-04-29	11,313	2,078	SL	2.56 %	290	290		
IMPROVEMENTS	2014-07-01	170,736	28,275	SL	2.56 %	4,378	4,378		
IMPROVEMENTS	2014-07-01	16,074	6,834	SL	15.0000	1,072	1,072		
IMPROVEMENTS	2014-07-01	38,958	16,557	SL	15.0000	2,597	2,597		
IMPROVEMENTS	2014-10-01	202,116	82,535	SL	15.0000	13,474	13,474		
FURNITURE	2014-10-01	2,321	2,024	200DB	7.64 %	297	297		
COOP APTS - 200 CPS	2014-11-01	37,107,542	8,282,965	SL	3.64 %	1,349,230	1,349,230		
COOP APTS-210 CPS RES	2015-06-30	16,359,167	3,296,371	SL	3.64 %	594,819	594,819		
COOP APT-210 CPS COMM'L	2015-06-30	1,100,000	156,321	SL	2.56 %	28,204	28,204		
IMPROVEMENTS	2014-12-31	499,418	87,542	SL	2.56 %	12,805	12,805		
EQUIPMENT	2014-10-01	9,285	8,096	200DB	7.64 %	1,189	1,189		
IMPROVEMENTS	2009-07-01	175,689	134,718	SL	6.67 %	11,718	11,718		
IMPROVEMENTS	2009-07-01	16,470	12,702	SL	6.67 %	1,099	1,099		

**Depreciation Schedule**

<b>Description of Property</b>	<b>Date Acquired</b>	<b>Cost or Other Basis</b>	<b>Prior Years' Depreciation</b>	<b>Computation Method</b>	<b>Rate / Life (# of years)</b>	<b>Current Year's Depreciation Expense</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Cost of Goods Sold Not Included</b>
IMPROVEMENTS	2010-07-01	38,488	26,946	SL	6.67 %	2,567	2,567		
IMPROVEMENTS	2010-07-01	30,157	21,111	SL	6.67 %	2,011	2,011		
IMPROVEMENTS	2011-06-28	70,717	45,387	SL	6.67 %	4,717	4,717		
IMPROVEMENTS	2011-12-21	663,065	419,872	SL	6.67 %	44,226	44,226		
IMPROVEMENTS	2013-10-01	162,929	77,396	SL	6.67 %	10,867	10,867		
IMPROVEMENTS	2014-07-01	64,298	27,331	SL	15.0000	4,287	4,287		
IMPROVEMENTS	2014-07-01	155,831	66,235	SL	15.0000	10,389	10,389		
IMPROVEMENTS	2014-10-01	808,464	330,152	SL	15.0000	53,898	53,898		
IMPROVEMENTS	1993-07-01	85,495	60,189	SL	2.56 %	2,192	2,192		
IMPROVEMENTS	1994-09-01	292,883	197,454	SL	2.56 %	7,510	7,510		
IMPROVEMENTS	1997-07-01	23,697	14,262	SL	2.56 %	608	608		
IMPROVEMENTS	1998-07-01	31,919	18,372	SL	2.56 %	818	818		
IMPROVEMENTS	1998-10-31	64,705	36,844	SL	2.56 %	1,659	1,659		
IMPROVEMENTS	1995-01-10	64,212	42,728	SL	2.56 %	1,646	1,646		
IMPROVEMENTS	1996-07-01	31,956	20,031	SL	2.56 %	819	819		
IMPROVEMENTS	1997-07-01	102,777	61,816	SL	2.56 %	2,635	2,635		
IMPROVEMENTS	2009-07-01	249,750	73,384	SL	2.56 %	6,404	6,404		
IMPROVEMENTS	2010-07-01	198,011	53,101	SL	2.56 %	5,077	5,077		
BUILDING	2011-12-21	31,217,952	6,510,326	SL	2.56 %	800,428	800,428		
IMPROVEMENTS	2012-07-01	18,370	3,994	SL	2.56 %	471	471		

**Depreciation Schedule**

<b>Description of Property</b>	<b>Date Acquired</b>	<b>Cost or Other Basis</b>	<b>Prior Years' Depreciation</b>	<b>Computation Method</b>	<b>Rate / Life (# of years)</b>	<b>Current Year's Depreciation Expense</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Cost of Goods Sold Not Included</b>
ADD'L AQUISITION COSTS	2012-01-01	3,058	699	SL	2.56 %	78	78		
IMPROVEMENTS	2013-10-01	124,522	23,017	SL	2.56 %	3,193	3,193		
IMPROVEMENTS	2013-04-29	23,920	4,700	SL	2.56 %	613	613		
IMPROVEMENTS	2013-04-29	45,252	8,313	SL	2.56 %	1,160	1,160		
MP ADJUSTMENT	2011-12-21	390,252	10,006			10,008	10,008		
IMPROVEMENTS	2014-07-01	682,943	113,092	SL	2.56 %	17,511	17,511		
IMPROVEMENTS	2014-12-31	349,250	53,730	SL	2.56 %	8,955	8,955		
IMPROVEMENTS	2015-07-01	1,997,671	279,621	SL	2.56 %	51,220	51,220		
IMPROVEMENTS	2015-07-01	87,314	13,434	SL	2.56 %	2,239	2,239		
BUILDING 754 STEP UP	2014-11-01	23,338,470	3,590,508	SL	2.56 %	598,422	598,422		
IMPROVEMENTS	2016-07-01	394,600	117,285	SL	15.0000	26,307	26,307		
IMPROVEMENTS	2016-07-01	1,578,401	469,137	SL	15.0000	105,227	105,227		
APPLIANCES	2016-07-01	4,218	2,712	SL	14.28 %	602	602		
IMPRVMNTS - COOLING TOWER	2017-07-01	72,600	6,440	SL	2.56 %	1,861	1,861		
IMPRVMNTS - COOLING TOWER	2017-07-01	290,400	25,756	SL	2.56 %	7,446	7,446		
IMPRVMNTS-BCG TI 1ST AMD	2016-12-31	960,480	256,128	SL	15.0000	64,032	64,032		
IMPRVMNTS-BCG TI 1ST AMD	2016-12-31	240,120	64,032	SL	15.0000	16,008	16,008		
IMPRVMNTS-BCG TI 2ND AMD	2017-01-01	579,446	154,520	SL	15.0000	38,630	38,630		
IMPRVMNTS-BCG TI 2ND AMD	2017-01-01	144,861	38,628	SL	15.0000	9,657	9,657		
APPLIANCES	2017-07-01	6,859	3,429	SL	14.29 %	980	980		

**Depreciation Schedule**

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
IMPROVEMENTS	2017-07-01	185,866	23,372	SL	3.64 %	6,758	6,758		
APPLIANCES	2017-07-01	1,227	613	SL	14.29 %	175	175		
APPLIANCES	2017-07-01	1,444	721	SL	14.29 %	206	206		
IMPROVEMENTS	2018-12-31	19,585	2,612	SL	15.0000	1,306	1,306		
IMPROVEMENTS	2018-12-31	1,052	140	SL	15.0000	70	70		
IMPROVEMENTS	2018-12-31	78,341	10,445	SL	15.0000	5,223	5,223		
IMPROVEMENTS	2018-12-31	4,209	562	SL	15.0000	281	281		
IMPROVEMENTS - DECL PTRS	2019-07-01	92,522	9,252	SL	15.0000	6,168	6,168		
IMPROVEMENTS - DECL PTRS	2019-07-01	370,089	37,009	SL	15.0000	24,673	24,673		
IMPROVEMENTS - MEAKEM	2019-07-01	173,668	17,367	SL	15.0000	11,578	11,578		
IMPROVEMENTS - MEAKEM	2019-07-01	694,670	69,467	SL	15.0000	46,311	46,311		
ELEVATOR IMPROVEMENTS - 20% 2019	2020-07-01	47,682	611	SL	39.0000	1,223	1,223		
ELEVATOR IMPROVEMENTS - 20% 2020	2020-07-01	57,031	731	SL	39.0000	1,462	1,462		
ELEVATOR IMPROVEMENTS - 80% 2019	2020-07-01	190,727	2,445	SL	39.0000	4,890	4,890		
ELEVATOR IMPROVEMENTS - 80% 2020	2020-07-01	228,120	2,925	SL	39.0000	5,849	5,849		
GARAGE - 20%	2021-12-31	433,842		SL	39.0000	5,562	5,562		
GARAGE - 80%	2021-12-31	1,735,371		SL	39.0000	22,248	22,248		
IMPROVEMENTS - RIVKIN 20%	2021-12-31	14,066		SL	15.0000	938	938		
IMPROVEMENTS - RIVKIN - 80%	2021-12-31	56,262		SL	15.0000	3,751	3,751		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

## TY 2021 Gain/Loss from Sale of Other Assets Schedule

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

### Gain Loss Sale Other Assets Schedule

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
K-1 PASSTHRU NET S/T GAIN (GEMS) UBTI		Purchase	2021-12		3,497		Cost		3,497	
K-1 PASSTHRU NET L/T GAIN (GEMS) UBTI		Purchase	2021-12		4,085		Cost		4,085	

**TY 2021 Investments - Other Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

**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>
MOUNTAIN LAKE PARTNERS LP	AT COST	856,926	856,926
GEMS FUND 4	AT COST	17,501,566	13,700,334
TERM LOAN GOLUB INVSTMT PTRS HOLDINGS	AT COST		
GOLUB CAPITAL INT'L LADDER - TRUST	AT COST	214,252,456	328,920,680
GOLUB CAPITAL INT'L IX	AT COST	3,910,930	22,476,346
GOLUB CAPITAL INT'L X	AT COST	3,077,914	5,845,083
BETHESDA TIC (20%)	AT COST	8,206,763	8,206,763
BETHESDA TIC (80%)	AT COST	28,628,630	28,628,630
1050 FIFTH AVE LLC	AT COST	2,829,146	511,525
SPITZER BRP GS LLC - ARCHER	AT COST		
NINTH AVENUE MEMBER LLC	AT COST	16,220,384	16,220,384
GOLUB CAPITAL INT'L LADDER - LUB	AT COST	66,649,732	100,224,505
SPITZER BRP GS LLC - CATON FLATS	AT COST		
451 TENTH MEMBER	AT COST	5,655,284	861,495
GOLUB CAP INV CORP - PUB SH (1435135.1)	AT COST		
GOLUB CAP INV CORP - PUB SH (174673)	AT COST		
SPITZER BRP EMPOWERMENT LLC	AT COST		
GOLUB CAPITAL INT'L TRANCHES	AT COST	15,000,000	19,200,210
CITIBANK INV A/C	AT COST	25,729,336	25,494,651
FIRST REPUBLIC INV A/C	AT COST	15,003,322	14,996,031
SAXA 34 PARTNERS LLC	AT COST	78,925	78,925

**TY 2021 Land, Etc.  
Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

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<b>Category / Item</b>	<b>Cost / Other Basis</b>	<b>Accumulated Depreciation</b>	<b>Book Value</b>	<b>End of Year Fair Market Value</b>
Buildings	54,766,323	13,747,478	41,018,845	54,766,323



**TY 2021 Legal Fees Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

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**Software Version:** 2021v4.1

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
LEGAL	56,364	56,364	0	0

**TY 2021 Mortgages and Notes Payable Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

**Total Mortgage Amount:** 5,000,000

**Mortgages and Notes Payable Schedule**

<b>Item No.</b>	1
<b>Lender's Name</b>	FIRST REPUBLIC BANK
<b>Lender's Title</b>	
<b>Relationship to Insider</b>	
<b>Original Amount of Loan</b>	5,000,000
<b>Balance Due</b>	5,000,000
<b>Date of Note</b>	2020-03
<b>Maturity Date</b>	
<b>Repayment Terms</b>	INTEREST ONLY
<b>Interest Rate</b>	3.5000
<b>Security Provided by Borrower</b>	ASSETS
<b>Purpose of Loan</b>	INVESTMENT
<b>Description of Lender Consideration</b>	VARIOUS
<b>Consideration FMV</b>	

**TY 2021 Other Assets Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
FOREIGN TAX CREDIT	3,261	1,025	1,025

**TY 2021 Other Decreases Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

<b>Description</b>	<b>Amount</b>
ESTATE TAX SEC 6166 PAYMENT	15,519,188

**TY 2021 Other Expenses Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADMINISTRATIVE EXPENSES	295,576			295,576
INSURANCE	9,390			9,390
MEMBERSHIP FEES	23,000			23,000
Rental Expenses	7,410,501	6,769,190		

**TY 2021 Other Income Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
NET K-1 PASS THRU ITEMS	-2,588,306	-2,737,625	

**TY 2021 Other Increases Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

**Other Increases Schedule**

<b>Description</b>	<b>Amount</b>
ADJUSTMENT	1,887

**TY 2021 Other Liabilities Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

<b>Description</b>	<b>Beginning of Year - Book Value</b>	<b>End of Year - Book Value</b>
PARTNERSHIP EXCHANGE	1,137,830	
Rounding	1	1



**TY 2021 Other Professional Fees Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
CONSULTING	92,550	0	0	92,550

**TY 2021 Taxes Schedule**

**Name:** BERNARD AND ANNE SPITZER  
CHARITABLE TRUST

**EIN:** 13-7298842

**Software ID:** 21013475

**Software Version:** 2021v4.1

**Taxes Schedule**

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
FEDERAL EXCISE TAX - 990PF	73,465			
FEDERAL INCOME TAX - 990T	143,668			
NYS CORP TAX - CT-13	40,051			