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Form **990-PF**

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

OMB No 1545-0052

2002

Department of the Treasury
Internal Revenue Service

Note The organization may be able to use a copy of this return to satisfy state reporting requirements

For calendar year **2002**, or tax year beginning , **2002**, and ending , **20**

G Check all that apply Initial return Final return Amended return Address change Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of organization ISRAEL HENRY BEREN CHARITABLE TRUST	A Employer identification number 48-6337836
	Number and street (or P O box number if mail is not delivered to street address) Room/suite P O BOX 20380	B Telephone number (see page 10 of the instructions) 316-265-3311
	City or town, state, and ZIP code WICHITA, KS 67208	C If exemption application is pending check here <input type="checkbox"/> D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
H 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		
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 48,308,775	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b) (c), and (d) may not necessarily equal the amounts in column (a) (see page 10 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule) Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B		3	SEE SCHEDULE 1		
2 Distributions from split-interest trusts					
3 Interest on savings and temporary cash investments		186,055	186,055		
4 Dividends and interest from securities		276,239	276,239		
5a Gross rents					
b (Net rental income or (loss) _____)					
6a Net gain or (loss) from sale of assets not on line 10		53,059			
b Gross sales price for all assets on line 6a _____					
7 Capital gain net income (from Part IV, line 2)			53,059		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule) SCHEDULE 1		(86,438)	(86,438)		
12 Total Add lines 1 through 11		428,918	428,915		
13 Compensation of officers, directors, trustees, etc					
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees (attach schedule)					
b Accounting fees (attach schedule) SCHEDULE 1		1,415		1,415	
c Other professional fees (attach schedule) SCH 1		17,316		17,316	
17 Interest SCH 1					
18 Taxes (attach schedule) (see page 13 of the instructions)		11,463	189		6,274
19 Depreciation (attach schedule) and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses (attach schedule) SCHEDULE 1		192			192
24 Total operating and administrative expenses. Add lines 13 through 23		30,386	189		25,197
25 Contributions, gifts, grants paid SCHEDULE 4		1,990,000			1,990,000
26 Total expenses and disbursements. Add lines 24 and 25		2,020,386	189		2,015,197
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements		(1,591,468)			
b Net investment income (if negative, enter -0-)			428,726		
c Adjusted net income (if negative, enter -0-)					

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)			
		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1	Cash — non-interest-bearing			
	2	Savings and temporary cash investments	1,446,824	4,118,792	4,118,792
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶	0	0	0
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments — U S and state government obligations (attach schedule) SCH 2	0	598,285	599,298
	b	Investments — corporate stock (attach schedule) SCHEDULE 2	5,500,040	5,531,627	8,017,418
	c	Investments — corporate bonds (attach schedule) SCHEDULE 2	50,000	50,000	50,000
	11	Investments — land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶				
12	Investments — mortgage loans				
13	Investments—other (attach schedule) SCHEDULE 3	40,097,722	35,004,414	35,523,267	
14	Land, buildings, and equipment basis ▶				
	Less accumulated depreciation (attach schedule) ▶				
15	Other assets (describe ▶)				
16	Total assets (to be completed by all filers — see page 16 of the instructions Also, see page 1, item I)	47,094,586	45,303,118	48,308,775	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable	200,000	0	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
23	Total liabilities (add lines 17 through 22)	200,000	0		
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Organizations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input type="checkbox"/>				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	46,894,586	45,303,118	
30	Total net assets or fund balances (see page 16 of the instructions)	46,894,586	45,303,118		
31	Total liabilities and net assets/fund balances (see page 16 of the instructions)	47,094,586	45,303,118		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	46,894,586
2	Enter amount from Part I, line 27a	2	(1,591,468)
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	45,303,118
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	45,303,118

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo., day, yr)
1a SEE SCHEDULE 3 ATTACHED		D,P	VARIOUS	2002
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(l) Gains (Col (h) gain minus col (k) but not less than -0-) or Losses (from col (h))
(f) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)		{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2 53,059
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)		{ If gain, also enter in Part I, line 8, column (c) (see pages 12 and 17 of the instructions) If (loss), enter -0- in Part I, line 8 }		3

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the organization liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
If "Yes," the organization does not qualify under section 4940(e). Do not complete this part.**1** Enter the appropriate amount in each column for each year, see page 17 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2001	2,803,726	55,655,701	0.05037625884
2000	2,991,478	58,021,646	0.05155796511
1999	2,829,304	54,914,334	0.05152213992
1998	2,506,567	48,992,644	0.05116210915
1997	1,900,580	40,790,495	0.04659369787
2 Total of line 1, column (d)			2 0.25121217089
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0.05024243417
4 Enter the net value of noncharitable-use assets for 2002 from Part X, line 5			4 51,824,429
5 Multiply line 4 by line 3			5 2,603,785
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 4,287
7 Add lines 5 and 6			7 2,608,072
8 Enter qualifying distributions from Part XII, line 4			8 2,015,197
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 17.			

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 — see page 17 of the instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling letter _____ (attach copy of ruling letter if necessary—see instructions)			
b Domestic organizations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	8,575
c All other domestic organizations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3 Add lines 1 and 2		3	8,575
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5 Tax based on investment income Subtract line 4 from line 3 If zero or less, enter -0-		5	8,575
6 Credits/Payments			
a 2002 estimated tax payments and 2001 overpayment credited to 2002	6a	13,026	
b Exempt foreign organizations — tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7	13,026	
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	4,451	
11 Enter the amount of line 10 to be Credited to 2003 estimated tax	11	0	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the organization attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 18 of the instructions for definition)? <i>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 organization in connection with the activities</i>		X
c Did the organization file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the organization $\$$ <u>N/A</u> (2) On organization managers $\$$ <u>N/A</u>		
e Enter the reimbursement (if any) paid by the organization during the year for political expenditure tax imposed on organization managers $\$$ <u>N/A</u>		
2 Has the organization engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>		X
3 Has the organization made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		X
4a Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the organization have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) \blacktriangleright OHIO		
b If the answer is "Yes" to line 7, has the organization furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	X	
9 Is the organization claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2002 or the taxable year beginning in 2002 (see instructions for Part XIV on page 25)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		X
11 Did the organization comply with the public inspection requirements for its annual returns and exemption application? Web site address \blacktriangleright	X	
12 The books are in care of \blacktriangleright ISRAEL HENRY BEREN CHARITABLE TRUST Telephone no \blacktriangleright 316-265-3311 Located at \blacktriangleright WICHITA, KS ZIP+4 \blacktriangleright 67208		
13 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year \blacktriangleright 13		

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

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

		Yes	No
1a	During the year did the organization (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the organization agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 19 of the instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	N/A
c	Did the organization engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2002?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the organization was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2002, did the organization have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2002? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► 20 _____, 20 _____, 19 _____, 19 _____		
b	Are there any years listed in 2a for which the organization is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement — see page 19 of the instructions)	2b	N/A
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20 _____, 20 _____, 19 _____, 19 _____		
3a	Did the organization hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2002 as a result of (1) any purchase by the organization 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 organization had excess business holdings in 2002)	3b	N/A
4a	Did the organization invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the organization make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2002?	4b	X
5a	During the year did the organization pay or incur any amount to		
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 20 of the instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	5b	N/A
c	If the answer is "Yes" to question 5a(4), does the organization claim exemption from the tax because it maintained expenditure responsibility for the grant? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," attach the statement required by Regulations section 53.4945-5(d)		
6a	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If you answered "Yes" to 6b, also file Form 8870	6b	X

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see page 20 of the 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
ROBERT M BEREN 13840 LEMANS WAY PALM BEACH GARDENS, FL 33410	TRUSTEE 2	NONE	NONE	NONE

2 Compensation of five highest-paid employees (other than those included on line 1 — see page 20 of the 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

Total number of other employees paid over \$50,000 ▶ NONE**3 Five highest-paid independent contractors for professional services — (see page 20 of the instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation

Total number of others receiving over \$50,000 for professional services ▶ NONE**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 21 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
3 All other program-related investments See page 21 of the instructions	
Total Add lines 1 through 3	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 21 of the instructions)

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a Average monthly fair market value of securities	1a	9,802,724
b Average of monthly cash balances	1b	5,267,838
c Fair market value of all other assets (see page 22 of the instructions)	1c	37,543,072
d Total (add lines 1a, b, and c)	1d	52,613,634
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2 Acquisition indebtedness applicable to line 1 assets	2	
3 Subtract line 2 from line 1d	3	52,613,634
4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 22 of the instructions)	4	789,205
5 Net value of noncharitable-use assets Subtract line 4 from line 3 Enter here and on Part V, line 4	5	51,824,429
6 Minimum investment return Enter 5% of line 5	6	2,591,221

Part XI Distributable Amount (see page 23 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part)

1 Minimum investment return from Part X, line 6	1	2,591,221
2a Tax on investment income for 2002 from Part VI, line 5	2a	8,575
b Income tax for 2002 (This does not include the tax from Part VI)	2b	
c Add lines 2a and 2b	2c	8,575
3 Distributable amount before adjustments Subtract line 2c from line 1	3	2,582,646
4a Recoveries of amounts treated as qualifying distributions	4a	
b Income distributions from section 4947(a)(2) trusts	4b	
c Add lines 4a and 4b	4c	
5 Add lines 3 and 4c	5	2,582,646
6 Deduction from distributable amount (see page 23 of the instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	2,582,646

Part XII Qualifying Distributions (see page 23 of the 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	2,015,197
b Program-related investments — Total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	2,015,197
5 Organizations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 24 of the instructions)	5	
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,015,197
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years		

Part XIII Undistributed Income (see page 24 of the instructions)

	(a) Corpus	(b) Years prior to 2001	(c) 2001	(d) 2002
1 Distributable amount for 2002 from Part XI, line 7				2,582,646
2 Undistributed income, if any, as of the end of 2001				
a Enter amount for 2001 only				
b Total for prior years 20____, 19____, 19____				
3 Excess distributions carryover, if any, to 2002				
a From 1997	14,524			
b From 1998	73,287			
c From 1999	145,445			
d From 2000	492,526			
e From 2001	50,249			
f Total of lines 3a through e	776,031			
4 Qualifying distributions for 2002 from Part XII, line 4 ▶ \$ 2,015,197				
a Applied to 2001, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see page 24 of the instructions)				
c Treated as distributions out of corpus (Election required — see page 24 of the instructions)				
d Applied to 2002 distributable amount				2,015,197
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2002 (If an amount appears in column (d), the same amount must be shown in column (a))	567,449			567,449
6 Enter the net total of each column as indicated below				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	208,582			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount — see page 24 of the instructions				
e Undistributed income for 2001 Subtract line 4a from line 2a Taxable amount — see page 24 of the instructions				
f Undistributed income for 2002 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2003				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) (see page 24 of the instructions)				
8 Excess distributions carryover from 1997 not applied on line 5 or line 7 (see page 25 of the instructions)				
9 Excess distributions carryover to 2003. Subtract lines 7 and 8 from line 6a	208,582			
10 Analysis of line 9				
a Excess from 1998	0			
b Excess from 1999	0			
c Excess from 2000	158,333			
d Excess from 2001	50,249			
e Excess from 2002	0			

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i>				
SEE SCHEDULE 4 ATTACHED		PUBLIC	CAPITAL EXPENDITURES	1,990,000
Total			▶ 3a	1,990,000
<i>b Approved for future payment</i>				
Total			▶ 3b	

ISRAEL HENRY BEREN CHARITABLE TRUST
Schedule 1

48-6337836
Form 990-PF, 2002

PART I, Line 1: Contributions, gifts, grants, etc., received:

Israel Henry Beren Estate	3
	3

PART I, Line 11: Other Income:

Ascot Partner, L P. - #13-3693341	
Ordinary Loss	(86,438)
Pequot Endowment Fund, L P - #06-1388800	
Ordinary Loss	0
	(86,438)

PART I, Line 16b: Accounting Expense:

KPMG Peat Marwick	1,415
	1,415

PART I, Line 16c: Other Professional Fees:

First Manhattan - Advisory Fees	17,316
	17,316

PART I, Line 18: Taxes:

Ohio Franchise Tax	0
Federal Income Tax	11,274
Foreign Tax Paid	189
	11,463

PART I, Line 23: Other Expenses:

Freight & Postage	192
Office Supplies	0
	192

ISRAEL HENRY BEREN CHARITABLE TRUST**48-6337836****Schedule 2****Form 990-PF, 2002**

BEGINNING OF YEAR	END OF YR BOOK VALUE	END OF YR MKT VALUE
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PART II, Line 10a: Investments - U.S. & state government obligations:

U S Treasury Bill-Due 2/6/03	600,000	0	598,285	599,298
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0	598,285	599,298
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PART II, Line 10b: Investments - corporate stock:

Stocks	# Shares			
Exxon/Mobil	60,000	911,796	911,796	2,096,400
Peoples Bancorp Inc.	19,000	203,322	203,322	588,467
Peoples Bancorp Inc	1,898	20,446	20,446	incl above
Chevron/Texaco Inc.	30,285	1,197,102	1,197,102	2,013,347
A T & T Corp	2,000	780,538	26,505	52,220
Abbott Laboratories	3,500	0	136,756	140,000
American Home Products	3,000	178,214	0	0
Arbitron Inc	4,000	0	118,973	134,000
Baxter International Inc	4,500	0	137,799	126,000
Bell South Corporation	6,000	195,000	78,000	155,220
Berkshire Hathaway	5	340,548	340,548	363,750
Comcast Corp	3,235	0	44,364	76,249
Diebold Inc	5,000	195,972	195,972	206,100
Enpro Inds Inc Com	800	0	4,450	3,200
Equifax Inc	4,000	0	112,238	92,560
Fair Isaac & Co Inc	3,000	0	114,113	128,100
B F Goodrich Co	5,000	0	115,365	91,600
Hartford Financial Services Gro	2,500	147,857	147,857	113,575
IMS Health Inc	8,500	0	166,108	136,000
IBM	1,200	0	103,233	93,000
Kimberly Clark Corp	3,000	144,451	174,139	142,410
Lockheed Martin Corp	268	5,762	0	0
Marsh & McLennan Co Inc	3,000	0	148,449	138,630
McCormick & Co Inc Non Votin	10,000	207,348	207,349	232,000
Nestle Sa-Sponsored	2,000	0	111,962	105,900
Pfizer Inc	5,000	0	192,890	152,850
Philip Morris Cos Inc	3,000	0	140,342	121,590
SBC Communication Inc	7,500	607,739	148,120	203,325
Verizon	5,000	363,945	119,625	193,750
Wells Fargo & Co New	2,500	0	113,804	117,175

5,500,040	5,531,627	8,017,418
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PART II, Line 10c: Investments - corporate bonds:

State of Israel Bonds	50,000	50,000	50,000
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50,000	50,000	50,000
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ISRAEL HENRY BEREN CHARITABLE TRUST**48-6337836****Schedule 2****Form 990-PF, 2002****PART II, Line 13: Investments - other:**

Ariel Fund Limited	2,000,000	2,000,000	2,875,374
Ascot Partners, L.P	7,520,920	8,351,789	8,351,789
Ascot Partners, L.P. - Unrealized Gain	3,393	3,393	3,393
Caduceus Capital, Ltd	3,000,000	3,000,000	2,160,854
Centurion Overseas Fund Ltd.	4,500,000	4,500,000	6,176,063
Chilton International, Ltd.	2,000,000	2,000,000	1,845,383
Chilton New Era International, Ltd.	2,000,000	2,000,000	2,060,433
CLSP Overseas, Ltd	2,000,000	2,000,000	2,049,326
First Bio Med Ltd	0	3,000,000	2,766,484
Gift Certificates com	18,431	18,431	18,431
Gotham Partners International	180,801	180,801	40,008
Lancer Offshore Inc.	5,000,000	5,000,000	4,572,967
Moore Technology Venture	950,000	950,000	196,016
Pequot Endowment, LLC	2,901,717	0	0
Pequot Endowment, LLC - Unrealized Loss	22,485	0	0
Pequot Healthcare Offshore Fund, Inc	2,000,000	0	0
Pequot Technology Offshore Fund, Inc	2,000,000	2,000,000	2,406,746
Rudman International Fund, Ltd	1,000,000	0	0
Zweig-Dimenna International Limited	2,999,975	0	0

40,097,722**35,004,414****35,523,267**

ISRAEL HENRY BEREN CHARITABLE TRUST
Schedule 3

48-6337836
Form 990-PF, 2002

DESCRIPTION	NUMBER OF UNITS	DATE ACQUIRED	DATE SOLD	SALES PROCEEDS	COST & EXPENSES OF SALE	SHORT-TERM GAIN/(LOSS)	20% LONG-TERM GAIN/(LOSS)
PEOPLES BANCORP - CASH-IN-LIEU		VARIOUS	7/1/2002	22 79	-		22 79
PEQUOT ENDOWMENT FUND LP	3911 627	1/2/2001	1/1/2002	2,901,717 17	2,924,202 20		(22,485.03)
PEQUOT HEALTHCARE OFFSHORE	5660 42	1/1/2001	1/1/2002	1,832,517 56	2,000,000 00		(167,482 44)
RUDMAN INTERNATIONAL FUND	3911.627	1/1/2001	1/1/2002	859,559.69	1,000,000 00		(140,440.31)
ZWEIG DIMENNA INTERNATIONAL	64 42	1/1/2000	1/1/2002	2,038,442 06	2,999,974 98		(961,532.92)
FIRST MANHATTAN COMPANY -SEE ATTACHED SCHEDULE 3A	STCG	VARIOUS	2002	192,473 49	274,550 10	(82,076 61)	
FIRST MANHATTAN COMPANY -SEE ATTACHED SCHEDULE 3A	LTCC	VARIOUS	2002	2,180,427 18	1,536,368 48		644,058 70
ASCOT PARTNERS, L P. STCG ID# 13-3693341	K-1		2002			782,995 00	
				10,005,159.94	10,735,095 76	700,918 39	(647,859.21)

53,059 18

ISRAEL HENRY BEREN CHARITABLE TRUST
Schedule 3A

48-6337836
Form 990-PF, 2002

DESCRIPTION	NUMBER OF UNITS	DATE ACQUIRED	DATE SOLD	SALES PROCEEDS	COST & EXPENSES OF SALE	SHORT-TERM GAIN/(LOSS)	20% LONG-TERM GAIN/(LOSS)
MONSANTO CO NEW COM	3,000	1/10/2002	6/20/2002	66,284 23	96,335.97	(30,051 74)	
WYETH	1,000	12/11/2001	9/13/2002	42,063 09	59,998 59	(17,935 50)	
WYETH	2,000	12/13/2001	9/13/2002	84,126 17	118,215.54	(34,089 37)	
				192,473 49	274,550.10	(82,076.61)	
AT&T CORP	17,270	7/1/1995	1/17/2002	320,445 72	289,944.86	30,500 86	
AT&T CORP	15,000	7/1/1995	4/25/2002	201,154 31	251,833 98	(50,679 67)	
AT&T CORP	10,000	7/1/1995	6/24/2002	99,268 73	167,889 33	(68,620 60)	
BELLSOUTH CORP	5,000	7/1/1995	1/3/2002	195,129.51	64,999 99	130,129 52	
BELLSOUTH CORP	4,000	7/1/1995	4/30/2002	123,337 13	52,000 00	71,337 13	
LOCKHEED MARTIN CORP	268	7/1/1995	1/17/2002	12,881 69	5,762.00	7,119.69	
SBC COMMUNICATIONS INC	10,000	7/1/1995	1/3/2002	395,633 85	205,000 00	190,633 85	
SBC COMMUNICATIONS INC	5,000	7/1/1995	4/30/2002	155,151 17	102,499 99	52,651 18	
SBC COMMUNICATIONS INC	5,088	7/1/1995	6/20/2002	157,819 95	104,304 01	53,515 94	
SBC COMMUNICATIONS INC	2,412	7/1/1995	6/20/2002	74,815 59	47,814.61	27,000 98	
VERIZON COMMUNICATIONS COM	4,716	7/1/1995	1/3/2002	231,532 80	117,900 01	113,632 79	
VERIZON COMMUNICATIONS COM	284	7/1/1995	1/3/2002	13,943 03	6,794.70	7,148 33	
VERIZON COMMUNICATIONS COM	5,000	7/1/1995	4/30/2002	199,313 70	119,625.00	79,688 70	
				2,372,900 67	1,810,918 58	644,058.70	

"X" = Written ackn rec'd
"NN" = Written ackn not necessary

CONTRIBUTIONS:			PURPOSE	
10/28/02	#1174	AISH HATORAH 28 PARK AVENUE AIRMONT, NY 10952	150,000 00 X	BUILDING PROJECT
06/26/02	#1165	CHABAD LUBAVITCH OF NORTH BROWARD	22,500 00 X	FULFILL PLEDGE
10/28/02	#1171	1500 N STATE ROAD 7 MARGATE, FL 33063	22,500 00 X	FULFILL PLEDGE
10/28/02	#1173	JERUSALEM COLLEGE OF TECHNOLOGY 21 HAVAAD HALEUMI ST POB 16031 JERUSALEM, 91160 ISRAEL	250,000 00 X	DORMITORY CONSTRUCTION
12/16/02	#1179	NER ISRAEL RABBINICAL COLLEGE 400 MT WILSON LANE BALTIMORE, MD 21208	125,000 00 X	SCHOLARSHIPS
10/28/02	#1172	ROBERT M BEREN ACADEMY 11333 CLIFFWOOD DR HOUSTON, TX 77035	100,000 00 X	PLEDGE-BUILDING
02/28/02	#1156	UNITED LUBAVITCHER YESHIVOTH	50,000 00 X	RESIDENCE HALL
10/10/02	#1169	433 CROWN STREET	75,000 00 X	PLEDGE-TORAH CENTER
11/26/02	#1175	BROOKLYN, NY 11225	100,000 00 X	RESIDENCE HALL
12/16/02	#1178	YESHIVA UNIVERSITY ISRAEL HENRY BEREN CHARITABLE TRUST ENDOWMENTS 500 WEST 185TH STREET NEW YORK, NY 10033-3299	1,095,000 00 X	PLEDGE-BUILDING

TOTAL CONTRIBUTIONS **1,990,000 00**

COPY

Form 8868

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

(December 2000) Department of the Treasury Internal Revenue Service

File a separate application for each return

- If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box
If you are filing for an Additional (not automatic) 3-Month Extension, complete only Part II (on page 2 of this form)

Note Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Part I Automatic 3-Month Extension of Time - Only submit original (no copies needed)

Note. Form 990-T corporations requesting an automatic 6-month extension - check this box and complete Part I only

All other corporations (including Form 990-C filers) must use Form 7004 to request an extension of time to file income tax returns Partnerships, REMICs and trusts must use Form 8736 to request an extension of time to file Form 1065, 1066, or 1041

Type or print Name of Exempt Organization ISRAEL HENRY BEREN CHARITABLE TRUST Employer identification number 48-6337836
Number street, and room or suite no If a P O box, see instructions P O BOX 20380
City town or post office, state, and ZIP code For a foreign address, see instructions WICHITA, KS 67208-2038

Check type of return to be filed (file a separate application for each return)

Form 990 Form 990-BL Form 990-EZ Form 990-PF Form 990-T (corporation) Form 990-T(sec 401(a) or 408(a) trust) Form 990-T (trust other than above) Form 1041-A Form 4720 Form 5227 Form 6069 Form 8870

- If the organization does not have an office or place of business in the United States, check this box
If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for the whole group, check this box If it is for part of the group, check this box and attach a list with the names and EINs of all members the extension will cover

1 I request an automatic 3-month (6-month, for 990-T corporation) extension of time until AUGUST 15, 2003 to file the exempt organization return for the organization named above The extension is for the organization's return for calendar year 2002 or tax year beginning and ending

2 If this tax year is for less than 12 months, check reason Initial return Final return Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions \$ 8575
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit \$ 13026
c Balance Due Subtract line 3b from line 3a Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions \$ NONE

Signature and Verification

Under penalties of perjury I declare that I have examined this form including accompanying schedules and statements and to the best of my knowledge and belief it is true correct and complete and that I am authorized to prepare this form

Signature Title CPA Date 5/15/03

For Paperwork Reduction Act Notice, see Instruction

Form 8868 (12-2000)