

EXTENDED TO NOVEMBER 15, 2017

Return of Private Foundation

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

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

Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf

Form 990-PF

Department of the Treasury  
Internal Revenue Service

OMB No 1545-0052

2016

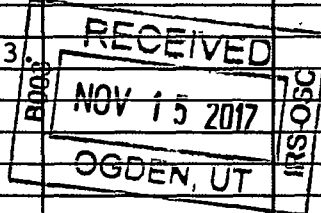
Open to Public Inspection

For calendar year 2016 or tax year beginning

, and ending

Name of foundation <b>ISRAEL HENRY BEREN CHARITABLE TRUST</b>		A Employer identification number <b>48-6337836</b>
Number and street (or P O box number if mail is not delivered to street address) <b>2020 N BRAMBLEWOOD</b>	Room/suite	B Telephone number <b>316-265-3311</b>
City or town, state or province, country, and ZIP or foreign postal code <b>WICHITA, KS 67206</b>		C If exemption application is pending, check here <input type="checkbox"/>
G 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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ <b>25,189,631.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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))		(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				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		2,546.	2,546.		STATEMENT 1
4 Dividends and interest from securities		605,627.	605,627.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		173,643.			
b Gross sales price for all assets on line 6a		1,873,881.			
7 Capital gain net income (from Part IV, line 2)			173,643.		
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)		10,200.	10,200.		STATEMENT 3
11 Other income		792,016.	792,016.		
12 Total. Add lines 1 through 11					
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		1,045.	0.		1,045.
c Other professional fees STMT 5		46,050.	46,050.		0.
17 Interest					
18 Taxes STMT 6		15,225.	5,231.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		19,678.	0.		19,678.
22 Printing and publications					
23 Other expenses STMT 7		648.	648.		0.
24 Total operating and administrative expenses Add lines 13 through 23		82,646.	51,929.		20,723.
25 Contributions, gifts, grants paid		4,557,928.			4,557,928.
26 Total expenses and disbursements. Add lines 24 and 25		4,640,574.	51,929.		4,578,651.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<3,848,558.>			
b Net investment income (if negative, enter -0-)			740,087.		
c Adjusted net income (if negative, enter -0-)				N/A	



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
Assets	1	Cash - non-interest-bearing		902,087.	328,114.	328,114.	
	2	Savings and temporary cash investments					
	3	Accounts receivable ▶					
		Less: allowance for doubtful accounts ▶					
	4	Pledges receivable ▶					
		Less: allowance for doubtful accounts ▶					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons					
	7	Other notes and loans receivable ... ▶					
		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					
	b	Investments - corporate stock <b>STMT 8</b>			7,837,664.	4,646,656.	15,815,470.
	c	Investments - corporate bonds					
	11	Investments - land, buildings, and equipment, basis ▶					
	Less: accumulated depreciation ▶						
12	Investments - mortgage loans						
13	Investments - other <b>STMT 9</b>			7,910,334.	7,826,757.	9,046,047.	
14	Land, buildings, and equipment, basis ▶						
	Less: accumulated depreciation ▶						
15	Other assets (describe ▶)						
16	<b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I)			16,650,085.	12,801,527.	25,189,631.	
Liabilities	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable					
	22	Other liabilities (describe ▶)					
23	<b>Total liabilities</b> (add lines 17 through 22)			0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.						
	24	Unrestricted					
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31						
	27	Capital stock, trust principal, or current funds			0.	0.	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds			16,650,085.	12,801,527.	
30	<b>Total net assets or fund balances</b>			16,650,085.	12,801,527.		
31	<b>Total liabilities and net assets/fund balances</b>			16,650,085.	12,801,527.		

**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	16,650,085.
2	Enter amount from Part I, line 27a	2	<3,848,558.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	12,801,527.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	<b>Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30</b>	6	<b>12,801,527.</b>

**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 ATTACHED	P		
b SEE ATTACHED	P		
c SEE ATTACHED	P		
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 478,779.		592,583.	<113,804.>
b 1,395,007.		1,107,655.	287,352.
c 95.			95.
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))
(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	
a			<113,804.>
b			287,352.
c			95.
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	173,643.
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). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

Yes  No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see 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))
2015	7,458,097.	21,424,922.	.348104
2014	2,830,191.	50,602,629.	.055930
2013	2,499,138.	58,387,250.	.042803
2012	2,510,457.	51,847,795.	.048420
2011	1,925,793.	49,513,874.	.038894

2 Total of line 1, column (d)	2	.534151
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	.106830
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	28,610,189.
5 Multiply line 4 by line 3	5	3,056,426.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	7,401.
7 Add lines 5 and 6	7	3,063,827.
8 Enter qualifying distributions from Part XII, line 4	8	4,578,651.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

Table with 11 rows for excise tax calculation. Includes sub-sections 1a-11 and sub-rows 6a-6d. Values include 7,401. and 24,544.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes sub-sections 1a-10. Includes 'Yes/No' columns and a 'N/A' entry.

Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A
14 The books are in care of THE FOUNDATION Telephone no. 316-265-3511 Located at 2020 N. BRAMBLEWOOD, WICHITA, KS ZIP+4 67206
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 N/A
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country

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

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

1a During the year did the foundation (either directly or indirectly):
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):
a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If "Yes," list the years
b Are there any years listed in 2a for which the foundation 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 instructions.)
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?
b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016)
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
b Did the foundation 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 2016?

**Part VII-B** Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?  Yes  No
- (3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)  Yes  No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  Yes  No


b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here

5b		X
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c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? **SEE STATEMENT 10**  Yes  No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  Yes  No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  Yes  No

If "Yes" to 6b, file Form 8870

6b		X
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7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes  No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **N/A**

7a		
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7b		
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**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.

(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 LE MANS WAY PALM BEACH GARDENS, FL 33410	TRUSTEE 2.00	0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services 0

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

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

	Expenses
1 N/A	
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments

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

	Amount
1 N/A	
2	
3 All other program-related investments. See instructions.	

Total. Add lines 1 through 3 0.

**Part X** Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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	18,871,604.
b	Average of monthly cash balances	1b	1,206,693.
c	Fair market value of all other assets	1c	8,967,580.
d	<b>Total</b> (add lines 1a, b, and c)	1d	29,045,877.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	29,045,877.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	435,688.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	28,610,189.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	1,430,509.

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

1	Minimum investment return from Part X, line 6	1	1,430,509.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	7,401.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	7,401.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,423,108.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,423,108.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,423,108.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	4,578,651.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	4,578,651.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	7,401.
6	<b>Adjusted qualifying distributions</b> Subtract line 5 from line 4	6	4,571,250.

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



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

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				1,423,108.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				
c From 2013				
d From 2014				
e From 2015	3,895,641.			
f Total of lines 3a through e	3,895,641.			
4 Qualifying distributions for 2016 from Part XII, line 4: ▶ \$ 4,578,651.				
a Applied to 2015, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2016 distributable amount				1,423,108.
e Remaining amount distributed out of corpus	3,155,543.			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	7,051,184.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	7,051,184.			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014				
d Excess from 2015	3,895,641.			
e Excess from 2016	3,155,543.			

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

**1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling ▶

**b** Check box to indicate whether the foundation is a private operating foundation described in section  4942(j)(3) or  4942(j)(5)

	Tax year				(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
<b>2 a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
<b>b</b> 85% of line 2a					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test - enter:					
<b>(1)</b> Value of all assets					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
<b>c</b> "Support" alternative test - enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

**Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)**

**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

NONE

**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.

NONE

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

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

**c** Any submission deadlines:

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

**Part XV** Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
ISRAEL HENRY BEREN CHARITABLE FOUNDATION, INC. 2020 N. BRAMBLEWOOD WICHITA, KS 67206				4,557,928.
<b>Total</b>				▶ 3a 4,557,928.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				▶ 3b 0.



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

- 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code... a Transfers from the reporting foundation to a noncharitable exempt organization of: (1) Cash (2) Other assets b Other transactions: (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations c Sharing of facilities, equipment, mailing lists, other assets, or paid employees d If the answer to any of the above is "Yes," complete the following schedule.

Table with 4 columns: (a) Line no, (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements. Row 1 contains 'N/A'.

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

Table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship. Row 1 contains 'N/A'.

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge. Signature of officer or trustee: [Signature] Date: 11/3/17 Title: TRUSTEE

May the IRS discuss this return with the preparer shown below (see instr)? [X] Yes [ ] No

Paid Preparer Use Only Print/Type preparer's name: BRIAN A. WILKINSON, CPA Preparer's signature: [Signature] Date: 10/30/17 Check [ ] if self-employed PTIN: P00744871 Firm's name: GJ & COMPANY, LLC Firm's EIN: 48-0970195 Firm's address: 345 RIVERVIEW, SUITE 520 WICHITA, KS 67203-4265 Phone no.: (316) 267-9211

## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
BANK OF AMERICA	100.	100.	
FIRST MANHATTAN COMPANY	1,345.	1,345.	
FIRST MANHATTAN COMPANY	1,101.	1,101.	
TOTAL TO PART I, LINE 3	2,546.	2,546.	

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
BANK OF AMERICA - US TRUST	454,092.	0.	454,092.	454,092.	
FIRST MANHATTAN COMPANY	151,535.	0.	151,535.	151,535.	
TO PART I, LINE 4	605,627.	0.	605,627.	605,627.	

## FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PARTNERSHIP INTEREST INCOME	28.	28.	
PARTNERSHIP INCOME	10,172.	10,172.	
TOTAL TO FORM 990-PF, PART I, LINE 11	10,200.	10,200.	

## FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GJ & COMPANY, LLC	1,045.	0.		1,045.
TO FORM 990-PF, PG 1, LN 16B	1,045.	0.		1,045.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	46,050.	46,050.		0.
TO FORM 990-PF, PG 1, LN 16C	46,050.	46,050.		0.

FORM 990-PF	TAXES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL INCOME TAX	9,994.	0.		0.
FOREIGN TAX WITHHELD ON INVESTMENT INCOME	5,231.	5,231.		0.
TO FORM 990-PF, PG 1, LN 18	15,225.	5,231.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ASCOT PARTNERS, L.P. - PORTFOLIO DEDUCTIONS	648.	648.		0.
TO FORM 990-PF, PG 1, LN 23	648.	648.		0.

FORM 990-PF	CORPORATE STOCK		STATEMENT 8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
SEE ATTACHED SCHEDULE 2	4,646,656.	15,815,470.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	4,646,656.	15,815,470.	

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 9

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE 2	COST	7,826,757.	9,046,047.
TOTAL TO FORM 990-PF, PART II, LINE 13		7,826,757.	9,046,047.



GRANTEE'S NAME

SEE SCHEDULE 5

GRANTEE'S ADDRESS

GRANT AMOUNT

DATE OF GRANT

AMOUNT EXPENDED

PURPOSE OF GRANT

**ISRAEL HENRY BEREN CHARITABLE TRUST**  
**Schedule 2**

**48-6337836**  
**Form 990-PF, 2016**

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:**

None	0	0	0	0
	0		0	

**PART II, Line 10b: Investments - corporate stock:**

Stocks:	# Shares			
Exxon/Mobil	60,000	911,796	911,796	5,415,600
Peoples Bancorp Inc.	24,136	203,322	203,322	783,455
Peoples Bancorp Inc.	incl above	20,446	20,446	incl above
Chevron/Texaco Inc.	60,570	1,197,102	1,197,102	7,129,089
Abbott Labs	1,500	0	67,302	57,615
Allergan PLC	700	213,728	0	0
Alphabet Inc	100	0	76,874	77,182
Anheuser Busch Inbev SA NV	4,500	0	0	0
Anheuser Busch Inbev SA NV	2,000	116,446	0	0
Apple Inc	800	0	74,257	92,656
Approach Resources Inc.	23,000	535,224	535,223	77,050
Approach Resources Inc	2,500	59,589	59,589	8,375
Aramark	<b>3,000</b>	327,952	81,988	107,160
Berkshire Hathaway	3	251,880	0	0
Block H & R	7,000	228,602	0	0
Block H & R	3,000	92,801	0	0
Brookfield Asset Mgmt Inc Vtg	<b>3,500</b>	170,335	74,522	115,535
CVS Corp	<b>1,000</b>	188,032	31,339	78,910
Capital One Finl Co	1,200	0	75,380	104,688
Coty Inc	3,000	0	71,139	54,930
Danaher Corp	<b>1,800</b>	342,826	117,664	140,112
Discovery Communications Inc	15,000	269,427	0	0
FedEx Corp	500	0	76,234	93,100
General Electric	<b>3,500</b>	121,320	56,616	110,600
Honeywell Intl Inc	<b>1,400</b>	191,554	88,918	162,190
IBM	<b>200</b>	69,349	27,740	33,198
IBM	<b>400</b>	208,659	55,642	66,396
Johnson & Johnson	<b>1,500</b>	285,271	95,090	172,815
Microsoft Corp	<b>3,000</b>	254,163	76,249	186,420

**ISRAEL HENRY BEREN CHARITABLE TRUST**  
**Schedule 2**

**48-6337836**  
**Form 990-PF, 2016**

**PART II, Line 10b: Investments - corporate stock:**

Nestle Sa-Sponsored	1,600	142,468	37,992	114,784
Oracle Corp	2,000	81,185	0	0
Oracle Corp	2,600	162,487	105,617	99,970
Perrigo Co	600	95,370	0	0
Perrigo Co	400	59,132	0	0
Perrigo Co	1,000	145,575	0	0
Pfizer Inc	4,000	0	120,462	129,920
Reckitt Benckiser	2,000	309,412	103,137	169,660
Wells Fargo & Co New	2,500	65,228	0	0
Wells Fargo & Co New	4,000	102,620	0	0
Wells Fargo & Co New	2,000	111,982	63,990	110,220
Zimmer Biomet Hlds	2,200	261,727	130,864	113,520
Zimmer Biomet Hlds	400	40,654	10,163	10,320

7,837,664	4,646,657	15,815,470
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**PART II, Line 10c: Investments - corporate bonds:**

None	0	0	0
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0	0	0
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**PART II, Line 13: Investments - other:**

Ascot Partners, L.P.	14,897	24,449	0
Ascot Partners, L.P. - Unrealized Loss	678,855	678,855	0
First Bio Med Ltd.	3,000,000	3,000,000	9,046,047
Gotham Partners International	0	0	0
Lancer Offshore Inc.	4,216,582	4,123,453	0

7,910,334	7,826,757	9,046,047
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**ISRAEL HENRY BEREN CHARITABLE TRUST**  
**Schedule 3A**

**48-6337836**  
**Form 990-PF, 2016**

DESCRIPTION	NUMBER OF UNITS	DATE ACQUIRED	DATE SOLD	SALES PROCEEDS	COST & EXPENSES OF SALE	SHORT-TERM GAIN/(LOSS)	LONG-TERM GAIN/(LOSS)
<b>SHORT-TERM - COVERED TRANSACTIONS:</b>							
BLOCK H & R INC	3,000	6/10/2015	4/22/2016	71,703.83	92,801.20	(21,097.37)	
PERRIGO CO	100	11/24/2015	4/26/2016	10,111.07	14,783.09	(4,672.02)	
PERRIGO CO	300	11/24/2015	5/10/2016	28,089.04	44,349.27	(16,260.23)	
PERRIGO CO	400	12/18/2015	5/10/2016	37,452.06	58,230.00	(20,777.94)	
PERRIGO CO	600	12/18/2015	6/10/2016	59,071.17	87,345.00	(28,273.83)	
PERRIGO CO	400	3/17/2016	6/10/2016	39,380.78	52,143.72	(12,762.94)	
BROOKFIELD BUSINESS	160	6/20/2016	6/21/2016	3,396.10	3,421.97	(25.87)	
MYLAN N V	3,800	6/10/2016	8/31/2016	160,874.25	168,635.94	(7,961.69)	
ALLERGAN PLC	300	4/8/2016	10/19/2016	88,900.48	70,872.85	(1,872.37)	
<b>TOTAL SHORT-TERM - COVERED</b>				<b>478,778.78</b>	<b>582,583.04</b>	<b>(113,804.26)</b>	
<b>SHORT-TERM - NON-COVERED TRANSACTIONS:</b>							
NONE						0.00	
<b>TOTAL SHORT-TERM - NON-COVERED</b>				<b>-</b>	<b>-</b>	<b>0.00</b>	
<b>LONG-TERM - COVERED TRANSACTIONS:</b>							
BLOCK H & R INC	7,000	3/25/2015	4/22/2016	167,308.95	228,602.31		(61,293.36)
PERRIGO CO	600	11/19/2014	4/26/2016	60,666.40	95,370.15		(34,703.75)
ALLERGAN PLC	300	6/26/2015	8/15/2016	75,866.65	91,597.60		(15,730.95)
ARAMARK	3,500	7/28/2014	8/18/2016	130,443.05	95,653		34,790.53
FORTIVE CORPORATION	2,000	6/24/2015	9/28/2016	103,113.55	81,350.95		21,762.60
ADVANSIX INC	120	12/24/2012	10/5/2016	1,767.66	1,014.08		753.58
ALLERGAN PLC	400	6/26/2015	10/19/2016	91,867.31	122,130.13		(30,262.82)
<b>TOTAL LONG-TERM - COVERED</b>				<b>631,033.57</b>	<b>715,717.74</b>		<b>(84,684.17)</b>
<b>LONG-TERM - NON-COVERED TRANSACTIONS:</b>							
CVS HEALTH CORP	1,000	10/21/2010	1/28/2016	93,967.47	31,338.64		62,628.83
CVS HEALTH CORP	2,000	10/21/2010	2/1/2016	193,150.64	62,677.28		130,473.36
DISCOVERY COMMUNICATIONS	5,000	12/1/2010	5/26/2016	129,896.16	89,809.07		40,087.09
DISCOVERY COMMUNICATIONS	1,500	12/1/2010	5/27/2016	39,324.69	26,942.72		12,381.97
DISCOVERY COMMUNICATIONS	8,500	12/1/2010	8/11/2016	211,138.44	152,675.42		58,463.02
NESTLE S A	1,200	8/31/2004	9/2/2016	96,496.09	28,493.69		68,002.40
<b>TOTAL LONG-TERM - NON-COVERED</b>				<b>763,973.49</b>	<b>391,936.82</b>		<b>372,036.67</b>
<b>TOTAL GAINS/LOSS</b>				<b>1,873,785.84</b>	<b>1,700,237.60</b>	<b>(113,804.26)</b>	<b>287,352.50</b>
				FMCO 1099 B	1,873,785.84		173,548.24
				FMCO Tbills Sold	-		
				<b>1,873,785.84</b>			



**ISRAEL HENRY BEREN CHARITABLE TRUST**  
**Schedule 5**

**48-6337836**  
**Form 990-PF, 2016**

**PART I, Line 18: Grants Payable:**

NONE

0

**Form 990-PF, Part VII-B, Line 5c – Expenditure Responsibility Statement**  
**See Schedule 6 & 7**

**Grant Amount:**

**Date of Grant**

6,319,526.35

12/26/2013

4,776,714.89

12/23/2014

4,951,227.26

12/24/2015

4,557,927.62

12/28/2016

**20,605,396.12**

**The Israel Henry Beren Charitable Trust**  
**EIN: 48-6337836**

Form 990-PF, Part VII-B, Line 5c – Expenditure Responsibility Statement

Recipient's Name and Address

The Israel Henry Beren Charitable Foundation, Inc.  
2020 N. Bramblewood  
Wichita, KS 67206  
Federal ID 45-2529445

Grant Amount: See Schedule 5

Date of Grant: See Schedule 5

Amount Expended (based upon most recent report received from Grantee): \$0

Verification Date: March 27, 2017

Purpose of Grant: To further the advancement, enhancement, promotion and/or welfare of the Orthodox Jewish faith and causes.

Date of Report by Grantee: October 27, 2017

Diversions by Grantee: None, to the knowledge of Grantor

Results of Verification: No independent verification was deemed necessary.



**ISRAEL HENRY BEREN CHARITABLE TRUST**  
**Schedule 7**

**48-6337836**  
**Form 990-PF, 2016**

BEGINNING OF YEAR	END OF YR BOOK VALUE	END OF YR MKT VALUE
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**Part II: Grants**

Stocks:	# Shares			
ABBOTT LABS	2,500	0	112,171	95,725
ALPHABET INC	125	0	96,093	98,908
ALTRIA GROUP INC	3,200	0	204,326	216,576
ANHEUSER BUSCH INBEV	2,000	0	116,446	205,640
APPLE INC	1,000	0	92,821	116,290
ARAMARK	5,500	0	150,311	199,265
BERKSHIRE HATHAWAY	3	0	251,880	747,000
BROOKFIELD ASSET MGT	4,500	0	95,814	148,680
CAPITAL ONE FINL CO	2,000	0	125,634	178,380
COTY INC	4,200	0	99,594	78,666
COTY INC	1,800	0	41,828	33,714
CVS HEALTH CORP	2,000	0	62,677	157,580
DANAHER CORP	2,200	0	143,811	172,326
FEDEX CORP	600	0	91,481	114,534
GENERAL ELECTRIC CO	4,000	0	64,704	127,280
HONEYWELL INTL INC	1,600	0	101,621	187,072
INTL BUSINESS MCHN	300	0	41,609	50,118
INTL BUSINESS MCHN	1,100	0	153,016	183,766
JOHNSON & JOHNSON	3,000	0	190,181	346,320
MICROSOFT CORP	7,000	0	177,914	444,850
NESTLE S A	3,200	0	75,983	228,352
ORACLE CORP	2,000	0	81,185	77,920
ORACLE CORP	1,400	0	56,870	54,544
PFIZER INC	3,000	0	90,346	97,020
RECKITT BENCKISER GR	4,000	0	206,274	332,000
WELLS FARGO & CO	2,500	0	65,228	139,375
WELLS FARGO & CO	4,000	0	102,620	223,000
WELLS FARGO & CO	1,500	0	47,992	83,625
ZIMMER BIOMET HLDS	1,100	0	130,864	111,727
ZIMMER BIOMET HLDS	300	0	30,491	30,471
UNITED STATES TREASURY - T-BILLS	650,000	0	648,058	648,192
CASH		0	8,084	8,084
CASH		0	600,000	600,000
		0	4,557,928	6,537,000