Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

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

▶ **Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

A For the 2020 calendar year, or tax year beginning 07-01-2020 , and ending 06-30-2021

B Check if applicable:
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Final return/terminated
- ☐ Amended return
- ☐ Application pending

C Name of organization
Jewish Federation of Metropolitan Chicago

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) 30 South Wells Street No 4049

Room/suite

City or town, state or province, country, and ZIP or foreign postal code
Chicago, IL 60606

D Employer identification number
36-2167761

E Telephone number
(312) 444-2814

G Gross receipts $ 169,353,912

F Name and address of principal officer:
Lonnie Nasatir
30 South Wells Street No 4049
Chicago,IL 60606

H(a) Is this a group return for subordinates? ☐ Yes ☑ No

H(b) Are all subordinates included? ☐ Yes ☐ No
If "No," attach a list. (see instructions)

H(c) Group exemption number ▶

I Tax-exempt status: ☑ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ www.JUF.org

K Form of organization: ☑ Corporation ☐ Trust ☐ Association ☐ Other ▶

L Year of formation: 1900

M State of legal domicile: IL

Part I Summary

1 Briefly describe the organization's mission or most significant activities:
Federation brings Jewish Chicago together to support human services, advocate on key issues and connect people to Jewish life and community.

2 Check this box ▶ ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.

3	Number of voting members of the governing body (Part VI, line 1a)	**3**	87
4	Number of independent voting members of the governing body (Part VI, line 1b)	**4**	84
5	Total number of individuals employed in calendar year 2020 (Part V, line 2a)	**5**	0
6	Total number of volunteers (estimate if necessary)	**6**	5,742
7a	Total unrelated business revenue from Part VIII, column (C), line 12	**7a**	-1,288,438
b	Net unrelated business taxable income from Form 990-T, line 39	**7b**	0

		Prior Year	Current Year
8	Contributions and grants (Part VIII, line 1h)	155,849,897	137,237,541
9	Program service revenue (Part VIII, line 2g)	3,147,532	3,543,509
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	16,055,947	26,803,149
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	1,677,701	1,769,713
12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	176,731,077	169,353,912
13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	153,439,453	153,120,641
14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	3,969,497	4,782,512
16a	Professional fundraising fees (Part IX, column (A), line 11e)	0	0
b	Total fundraising expenses (Part IX, column (D), line 25) ▶0		
17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	2,782,301	2,455,471
18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	160,191,251	160,358,624
19	Revenue less expenses. Subtract line 18 from line 12	16,539,826	8,995,288

		Beginning of Current Year	End of Year
20	Total assets (Part X, line 16)	932,459,099	1,085,129,987
21	Total liabilities (Part X, line 26)	253,037,285	284,350,867
22	Net assets or fund balances. Subtract line 21 from line 20	679,421,814	800,779,120

Part II Signature Block

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 officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer — Date: 2022-05-11

James A Pinkston VP, Accounting
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
		2022-05-11		P01247672

Firm's name ▶ RSM US LLP — Firm's EIN ▶ 42-0714325

Firm's address ▶ 30 S Wacker Drive Ste 3300
Chicago, IL 60606 — Phone no. (312) 634-3400

May the IRS discuss this return with the preparer shown above? (see instructions) ☑ Yes ☐ No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III . . . . . ☑

1 Briefly describe the organization's mission:

Federation amplifies our collective strength to make the world a better place for everyone. We assist people in need, impacting 500,000 Chicagoans of all faiths; support Israel and the Jewish people worldwide; respond swiftly to crises; cultivate Jewish identity & connection; and advance Jewish learning.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? . . . . . ☐ Yes ☑ No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? . . . . . ☐ Yes ☑ No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses $ 149,943,308 including grants of $ 148,412,819) (Revenue $)

The Federation's largest endeavor is to allocate funds to a network of nearly 70 agencies in the Chicago area that provide assistance to 500,000 Chicagoans of all faiths, including: hot meals and groceries, utility and rent assistance, prescriptions and medical care for impoverished families; job training and placement for people who are out of work; therapeutic school and specialized care for children with disabilities; support services for Holocaust survivors; assisted living, specialized Alzheimer's care and transportation for seniors; respite services for caregivers of frail seniors and people with disabilities; counseling, prevention and intervention services for troubled teens; and an entire continuum of prevention and therapeutic services for individuals and families in crisis.Because the Jewish United Fund of Metropolitan Chicago and the Jewish Federation of Metropolitan Chicago are closely linked in numerous ways (combined Board of Directors, shared professional and shared office space), and because JUF provides an annual, multi-million dollar allocation to the Jewish Federation, we measure and report our program and service results jointly for the combined JUF/Federation enterprise, which are summarized below:PROVIDING HELP AND HOPE TO PEOPLE IN NEEDWhen COVID-19 transformed life as we knew it, creating human needs greater in scope than we had seen in our lifetime, JUF swiftly became a lifeline for tens of thousands of people. - 36,000 people received food assistance through JUF-funded meal and grocery programs.- 30,000 people received $16.6 million in emergency financial assistance from JUF agencies in 2021 - a 40% increase in dollars over 2020. - 88% more emergency dollars were provided for housing and 52% more emergency dollars were provided for food compared to last year. - 2,300 Holocaust survivors received $10.8 million in emergency financial aid from JUF agencies in 2021 - a 25% increase over last year. - 36,000 people received mental health care - a 65% increase over 2020.- Respite services were doubled for caregivers of people with disabilities- 35,000 people benefited from extra support for Jewish day schools, preschools and summer campsWith accelerating threats and attacks against Jewish institutions, there was also increased demand for JUF's support in providing security for Jewish Chicago.- 100 Jewish groups assisted to date in getting additional funding to strengthen their security, including $20 million in U.S. Homeland Security grants and $6 million in State capital security grants. - 88 Chicago-area Jewish groups received $1.6 million in JUF matching grants in the last three years, which leveraged an additional $2.3 million in matching funds, resulting in nearly $4 million of new or improved physical security protecting 37,000 people. ENGAGING THE COMMUNITY IN JEWISH LIFE JUF connected young families to Jewish identity and community throughout the year.- 11,000 local children get free, monthly Jewish books through PJ Library & PJ Our Way. - 8,000 young families participated in programs and events through JUF and its agencies last year - 1 in 5 of them for the first time.- JUF and its agencies hosted 300 events for young families throughout the yearDynamic, JUF-supported programs engaged teens, college students & young adults in Jewish life.- 7,400 teens engaged Jewishly through programs run by JUF and JUF-supported agencies - an 87% increase over 2020. - 5,500 young adults engaged in programs provided by JUF and its agencies in 2021 - half of them for the first time. - 2,300 (36%) of all Jewish college students in Illinois participated in Hillel in 2021.- 1,500 college students attended 54 pre-Israel programs and events held on 16 college campuses across Illinois- 1,200 youth received $1 million in scholarships and vouchers for Jewish summer camp.JUF continued to help make Jewish education more affordable. - 4,300 individuals received $45.6 million in scholarships & tuition assistance in 2021 to help them afford Jewish preschool, day school, graduate and undergraduate programs.- 3,500 local Jewish Day School students - 76% of those enrolled - received scholarships and/or tuition assistance from JUF-supported day schools, which totaled $43.8 million in 2021.- 500+ preschoolers - 1 in 5 of those enrolled - received $1 million in scholarships and subsidies from JUF and JCC to help make their early childhood education possible. And JUF engaged community members of all ages.- 48,000 community members attended outreach & education programs through JUF agencies in 2021, from support groups and workshops to genetic education and Jewish enrichment. - 22,000 adults attended 275 local Jewish programs provided by JUF and JCC Chicago.- 9,300 older adults participated in programming across JUF agencies.

4b (Code:) (Expenses $ 3,512,508 including grants of $ 3,047,299) (Revenue $ 3,543,509)

Refugee Resettlement Services Program - The Jewish Federation administers comprehensive refugee social services on behalf of the State of Illinois. The Illinois Refugee Social Service Consortium is comprised of 10 direct service agencies committed to providing quality refugee social services including: Employment Assistance, Cultural Adjustment, Case management, K-12, Youth Mentoring, Services to Older Refugees (Seniors), Mental Health counseling, data collection, reporting via an online Salesforce database.

4c (Code:) (Expenses $ 2,009,883 including grants of $ 1,660,523) (Revenue $)

Hillels of Illinois - Federation supports a vast array of Jewish activities for students at colleges, universities and professional schools in Illinois. The Hillel program provides opportunities for Jewish students to explore and celebrate their Jewish identity at 16 different college campuses in Illinois, as well as through Hillel Regional programs. Hillel's vision is a world where every Jewish student is inspired to make an enduring commitment to Jewish life, learning and Israel. Hillel seeks to enrich the lives of Jewish students so that they may enrich the Jewish people and the world. Hillel seeks to create a pluralistic, welcoming and inclusive environment for Jewish college students: an environment where students are encouraged to grow intellectually, spiritually and socially. Increasingly, Hillel must help Jewish students counter campaigns by the Boycott, Divestment, and Sanctions movement to delegitimize and demonize Israel, and to address the concomitant increase in campus anti-Semitism.

4d Other program services (Describe in Schedule O.)

(Expenses $ including grants of $) (Revenue $)

4e **Total program service expenses** ▶ 155,465,699

Part IV Checklist of Required Schedules

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A*	1	Yes	
2	Is the organization required to complete *Schedule B, Schedule of Contributors* (see instructions)?	2	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I*	3		No
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4	Yes	
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? *If "Yes," complete Schedule C, Part III*	5		No
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D,* Part I	6	Yes	
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II*	7		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D,* Part III	8		No
9	Did the organization report an amount in Part X, line 21 for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV*	9	Yes	
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi endowments? *If "Yes," complete Schedule D, Part V*	10	Yes	
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D,* Part VI.	11a		No
b	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII*	11b	Yes	
c	Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VIII*	11c		No
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX*	11d	Yes	
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e	Yes	
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X*	11f	Yes	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a		No
b	Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional*	12b	Yes	
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		No
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		No
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV*	14b		No
15	Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? *If "Yes," complete Schedule F, Parts II and IV*	15		No
16	Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? *If "Yes," complete Schedule F, Parts III and IV*	16		No
17	Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I* (see instructions)	17		No
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18		No
19	Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III*	19		No
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		No
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
21	Did the organization report more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II*	21	Yes	

Part IV Checklist of Required Schedules *(continued)*

			Yes	No
22	Did the organization report more than $5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? *If "Yes," complete Schedule I, Parts I and III*	22	Yes	
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? *If "Yes," complete Schedule J*	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? *If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a*	24a	Yes	
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		No
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		No
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		No
25a	**Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L,* Part I	25a		No
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? *If "Yes," complete Schedule L,* Part I	25b		No
26	Did the organization report any amount on Part X, line 5 or 22 for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? *If "Yes," complete Schedule L, Part II*	26		No
27	Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? *If "Yes," complete Schedule L,* Part III	27		No
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):			
a	A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? *If "Yes," complete Schedule L, Part IV*	28a	Yes	
b	A family member of any individual described in line 28a? *If "Yes," complete Schedule L, Part IV*	28b		No
c	A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? *If "Yes," complete Schedule L, Part IV*	28c		No
29	Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M*	29	Yes	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II*	32		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? *If "Yes," complete Schedule R, Part I*	33		No
34	Was the organization related to any tax-exempt or taxable entity? *If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1*	34	Yes	
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	Yes	
b	If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? *If "Yes," complete Schedule R, Part V, line 2*	35b	Yes	
36	**Section 501(c)(3) organizations.** Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2*	36		No
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? *If "Yes," complete Schedule R, Part VI*	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? **Note.** All Form 990 filers are required to complete Schedule O.	38	Yes	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V ☐

				Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1a	205		
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b	0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			1c Yes	

Part V Statements Regarding Other IRS Filings and Tax Compliance *(continued)*

2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	**2a**	0		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? **Note.** If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)			**2b**	
3a	Did the organization have unrelated business gross income of $1,000 or more during the year?			**3a**	Yes
b	If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation in Schedule O*			**3b**	Yes
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?			**4a**	No
b	If "Yes," enter the name of the foreign country: ▶ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).				
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?			**5a**	No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			**5b**	No
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?			**5c**	
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?			**6a**	No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			**6b**	
7	**Organizations that may receive deductible contributions under section 170(c).**				
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?			**7a**	No
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?			**7b**	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			**7c**	No
d	If "Yes," indicate the number of Forms 8282 filed during the year	**7d**			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			**7e**	No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			**7f**	No
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?			**7g**	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?			**7h**	
8	**Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?			**8**	No
9	**Sponsoring organizations maintaining donor advised funds.**				
a	Did the sponsoring organization make any taxable distributions under section 4966?			**9a**	No
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?			**9b**	No
10	**Section 501(c)(7) organizations.** Enter:				
a	Initiation fees and capital contributions included on Part VIII, line 12	**10a**			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	**10b**			
11	**Section 501(c)(12) organizations.** Enter:				
a	Gross income from members or shareholders	**11a**			
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	**11b**			
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?			**12a**	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year.	**12b**			
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**				
a	Is the organization licensed to issue qualified health plans in more than one state? **Note.** See the instructions for additional information the organization must report on Schedule O.			**13a**	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	**13b**			
c	Enter the amount of reserves on hand	**13c**			
14a	Did the organization receive any payments for indoor tanning services during the tax year?			**14a**	No
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O*			**14b**	
15	Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year?			**15**	No
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.			**16**	No

Part VI **Governance, Management, and Disclosure** *For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.*

Check if Schedule O contains a response or note to any line in this Part VI . . . . . ☑

Section A. Governing Body and Management

				Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year. If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.	**1a**	87		
b	Enter the number of voting members included in line 1a, above, who are independent	**1b**	84		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		**2**	Yes	
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		**3**		No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		**4**		No
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		**5**		No
6	Did the organization have members or stockholders?		**6**	Yes	
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		**7a**	Yes	
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		**7b**		No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:				
a	The governing body?		**8a**	Yes	
b	Each committee with authority to act on behalf of the governing body?		**8b**	Yes	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses in Schedule O*		**9**		No

Section B. Policies (*This Section B requests information about policies not required by the Internal Revenue Code.*)

			Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	**10a**		No
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	**10b**		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	**11a**	Yes	
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990.			
12a	Did the organization have a written conflict of interest policy? *If "No," go to line 13*	**12a**	Yes	
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	**12b**	Yes	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe in Schedule O how this was done*	**12c**	Yes	
13	Did the organization have a written whistleblower policy?	**13**	Yes	
14	Did the organization have a written document retention and destruction policy?	**14**	Yes	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	**15a**	Yes	
b	Other officers or key employees of the organization	**15b**	Yes	
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	**16a**		No
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	**16b**		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ▶ IL, CA

18 Section 6104 requires an organization to make its Form 1023 (or 1024-A if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☐ Own website ☐ Another's website ☑ Upon request ☑ Other (explain in Schedule O)

19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records: ▶ James A Pinkston 30 South Wells Street Suite 4049 Chicago, IL 60606 (312) 357-4790

Part VII Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII . . . . . ☑

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than $100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations.

See instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
(1) Dr Steven B Nasatir PhD Executive Vice Chairman	8.00 30.00			X				462,298	42,945	15,794
(2) Lonnie Nasatir President	25.00 25.00			X				200,273	244,778	27,808
(3) Jay Tcath Executive Vice President	25.00 25.00			X				145,914	185,709	84,642
(4) David S Rosen Senior VP - Endowments	40.00 10.00			X				408,789	0	37,679
(5) Rabbi Louis A Lazovsky Vice President - Human Resources	40.00 10.00				X			27,033	243,294	95,437
(6) David S Rubovits PhD Chief Operating Officer	11.00 39.00			X				0	274,134	78,406
(7) Boaz Blumovitz Chief Financial Officer	27.50 22.50			X				88,434	239,099	21,054
(8) James Rosenberg Chief of Staff	10.00 40.00			X				0	272,506	56,459
(9) James A Pinkston Vice President - Accountin	25.00 25.00			X				35,513	248,587	30,857
(10) John Lowenstein VP Campus Affairs & Student Eng.	49.00 1.00					X		253,382	0	48,387
(11) Deborah Covington Senior VP Planning & Allocation	10.00 40.00			X				9,494	180,391	105,657
(12) David Prystowsky Vice President - Campaign	0.00 50.00			X				0	233,375	36,694
(13) Robert Schuckman VP - General Counsel	40.00 10.00			X				173,892	43,473	51,855
(14) Peter Chiswick Sr Assoc V.P. & Dir, JUF Invest.	23.00 27.00			X				0	214,973	54,126
(15) Rose Jagust VP Donor Advised Funds	40.00 10.00			X				175,055	0	55,681
(16) Scott Aaron Associate VP JUF Education	40.00 0.00					X		199,869	0	30,164
(17) Audra P Berg VP, Leadership Eng. & Board Rel.	41.50 8.50			X				0	171,608	27,285

Part VII **Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** *(continued)*

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
(18) Tracy More V.P. Cmty. Outreach & Eng. Officer	50.00 0.00			X				161,751	0	16,317
(19) Michael Simon Executive Director Fiedler Hillel	40.00 0.00					X		164,408	0	14,452
(20) Anna Levin Executive Dir University of Chicago	40.00 0.00					X		149,990	0	11,270
(21) Joel Poupko Rabbinic Scholar	40.00 0.00					X		197,377	0	32,040
(22) Pam F Szokol Chairman	5.00 5.00	X		X				0	0	0
(23) Wendy C Abrams Vice Chairman	0.50 0.50	X		X				0	0	0
(24) Gita Berk Vice Chairman	5.00 5.00	X		X				0	0	0
(25) Linda B Ginsburg Vice Chairman	5.00 5.00	X		X				0	0	0
(26) Jordan T Goodman Vice Chairman	0.50 0.50	X		X				0	0	0
(27) Joshua B Herz Vice Chairman	5.00 5.00	X		X				0	0	0
(28) Scott Heyman Vice Chairman	5.00 5.00	X		X				0	0	0
(29) Dana Westreich Hirt Vice Chairman	0.50 0.50	X		X				0	0	0
(30) Deborah Schrayer Karmin Vice Chairman	0.50 0.50	X		X				0	0	0
(31) Jane Cadden Lederman Vice Chairman	5.00 5.00	X		X				0	0	0
(32) Steven N Miller Vice Chairman	0.50 0.50	X		X				0	0	0
(33) David Rosenbaum Vice Chairman	0.50 0.50	X		X				0	0	0
(34) Kim Shwachman Vice Chairman	5.00 5.00	X		X				0	0	0
(35) Marc Spellman Vice Chairman	5.00 5.00	X		X				0	0	0
(36) Cindy Kaplan Treasurer	5.00 5.00	X		X				0	0	0
(37) Jason Peltz Assistant Treasurer	5.00 5.00	X		X				0	0	0
(38) Peter B Bensinger Jr Secretary	0.50 0.50	X		X				0	0	0
(39) Jeremy Amster Assistant Secretary	0.50 0.50	X		X				0	0	0
(40) Dr Edward M Atkins Director	0.50 0.50	X						0	0	0
(41) Katie Berger Director	0.50 0.50	X						0	0	0
(42) Wendy Berger Director	5.00 5.00	X						0	0	0
(43) Debbie L Berman Director	0.50 0.50	X						0	0	0
(44) Marc S Brenner Director	0.50 0.50	X						0	0	0
(45) David T Brown Director	0.50 0.50	X						0	0	0
(46) Susan Spier Chapman Director	0.50 0.50	X						0	0	0
(47) Caroline Davidson Director	0.50 0.50	X						0	0	0
(48) Rabbi Alex Felch Director	0.50 0.50	X						0	0	0
(49) Maury Fertig Director	0.50 0.50	X						0	0	0
(50) Linda Schottenstein Fisher Director	0.50 0.50	X						0	0	0
(51) Michael T Fishman Director	0.50 0.50	X						0	0	0
(52) Jason Friedman Director	0.50 0.50	X						0	0	0
(53) Andrew Glick Director	0.50 0.50	X						0	0	0
(54) David Golder Director	0.50 0.50	X						0	0	0
(55) Craig Goldsmith Director	0.50 0.50	X						0	0	0
(56) Steven M Greenbaum Director	0.50 0.50	X						0	0	0
(57) King W Harris Director	0.50 0.50	X						0	0	0
(58) Rabbi Sidney M Helbraun Director	0.50 0.50	X						0	0	0
(59) Andrew S Hochberg Director	10.00 10.00	X						0	0	0
(60) Lisa Jericho Director	0.50 0.50	X						0	0	0
(61) Cathy Kahn Director	0.50 0.50	X						0	0	0
(62) Linda Kellough Director	0.50 0.50	X						0	0	0
(63) Ari Klein Director	0.50 0.50	X						0	0	0
(64) Ann-Louise Kleper Director	0.50 0.50	X						0	0	0
(65) Adrienne J Kriezelman Director	0.50 0.50	X						0	0	0
(66) Steven H Lavin Director	0.50 0.50	X						0	0	0
(67) Jennifer Leemis Director	0.50 0.50	X						0	0	0
(68) Brian J Levinson Director	0.50 0.50	X						0	0	0
(69) Laurie Lustbader Director	0.50 0.50	X						0	0	0
(70) Lindsey P Markus Director	0.50 0.50	X						0	0	0
(71) Yosef Meystel Director	0.50 0.50	X						0	0	0
(72) Lee I Miller Director	0.50 0.50	X						0	0	0
(73) Michael Oxman Director	0.50 0.50	X						0	0	0
(74) Ross S Pearlstein Director	0.50 0.50	X						0	0	0
(75) Sanford E Perl Director	0.50 0.50	X						0	0	0
(76) Theodore F Perlman Director	0.50 0.50	X						0	0	0
(77) David Porush Director	0.50 0.50	X						0	0	0
(78) Brandon C Prosansky Director	0.50 0.50	X						0	0	0
(79) Elliot Robinson Director	0.50 0.50	X						0	0	0
(80) Lisa Rosenkranz Director	0.50 0.50	X						0	0	0
(81) Avi Rothner Director	0.50 0.50	X						0	0	0
(82) Eric A Rothner Director	0.50 0.50	X						0	0	0
(83) Gail L Rudo Director	0.50 0.50	X						0	0	0
(84) Susan Sacks Director	0.50 0.50	X						0	0	0
(85) Charlene K Sales Director	0.50 0.50	X						0	0	0
(86) James Sarnoff Director	0.50 0.50	X						0	0	0
(87) Max Schrayer Director	0.50 0.50	X						0	0	0
(88) Harry J Seigle Director	0.50 0.50	X						0	0	0
(89) Midge Perlman Shafton Director	0.50 0.50	X						0	0	0
(90) Devra Resnick Shutan Director	0.50 0.50	X						0	0	0
(91) Bill Silverstein Director	0.50 0.50	X						0	0	0
(92) Shari Slavin Director	0.50 0.50	X						0	0	0
(93) Judy L Smith Director	0.50 0.50	X						0	0	0
(94) Alan P Solow Director	0.50 0.50	X						0	0	0
(95) Sara Crown Star Director	0.50 0.50	X						0	0	0
(96) Rachel Stein Director	0.50 0.50	X						0	0	0
(97) Victoria Stender Director	0.50 0.50	X						0	0	0
(98) Phyllis Tabachnick Director	0.50 0.50	X						0	0	0
(99) Bruce Taylor Director	0.50 0.50	X						0	0	0
(100) Alex Turik Director	0.50 0.50	X						0	0	0
(101) Kalman Wenig Director	0.50 0.50	X						0	0	0
(102) Deborah Winick Director	0.50 0.50	X						0	0	0
(103) Andrea R Yablon Director	0.50 0.50	X						0	0	0
(104) Michael H Zaransky Director	0.50 0.50	X						0	0	0
(105) Hilary Greenberg Ex-Officio	0.50 0.50	X						0	0	0
(106) Amy Yeager E Hausman Ex-Officio	0.50 0.50	X						0	0	0
(107) Marc Karlinsky Ex-Officio	0.50 0.50	X						0	0	0
(108) Alison J Karmin Ex-Officio	0.50 0.50	X						0	0	0
1b Sub-Total										
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)								2,853,472	2,594,872	932,064

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶ 1 2

		Yes	No
3 Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*	**3**		No
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? *If "Yes," complete Schedule J for such individual*	**4**	Yes	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*	**5**		No

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
RSM US LLP 5155 Paysphere Circle Chicago, IL 60674	Audit & Tax Services	679,032
Rosov Consulting LLC 2095 Rose Drive Berkeley, CA 94709	Consulting Services	129,973
Seyfarth Shaw 3807 Collections Center Drive Chicago, IL 60693	Legal Services	122,210
Stellar Technology Solutions PO Box 825441 Philadelphia, PA 19182	Technology Services	120,000
Campus Kosher Catering 1212 Holiday Drive Champaign, IL 61821	Catering Services	111,841

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization ▶ 5

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII . . . . . ☑

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns	1a	501,720			
	b Membership dues	1b				
	c Fundraising events	1c				
	d Related organizations	1d	56,370,158			
	e Government grants (contributions)	1e	506,988			
	f All other contributions, gifts, grants, and similar amounts not included above	1f	79,858,675			
	g Noncash contributions included in lines 1a - 1f:$	1g	19,908,307			
	h **Total.** Add lines 1a-1f		137,237,541			
Program Service Revenue		Business Code				
	2a Refugee Program	900099	3,543,509	3,543,509		
	b					
	c					
	d					
	e					
	f All other program service revenue.					
	g **Total.** Add lines 2a–2f		3,543,509			
	3 Investment income (including dividends, interest, and other similar amounts)		1,465,905		-1,428,596	2,894,501
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
		(i) Real	(ii) Personal			
	6a Gross rents	6a				
	b Less: rental expenses	6b				
	c Rental income or (loss)	6c				
	d Net rental income or (loss)					
		(i) Securities	(ii) Other			
	7a Gross amount from sales of assets other than inventory	7a	25,337,244			
	b Less: cost or other basis and sales expenses	7b	0			
	c Gain or (loss)	7c	25,337,244			
	d Net gain or (loss)		25,337,244		140,158	25,197,086
Other Revenue	8a Gross income from fundraising events (not including $ _____ of contributions reported on line 1c). See Part IV, line 18	8a				
	b Less: direct expenses	8b				
	c Net income or (loss) from fundraising events					
	9a Gross income from gaming activities. See Part IV, line 19	9a				
	b Less: direct expenses	9b				
	c Net income or (loss) from gaming activities					
	10a Gross sales of inventory, less					

returns and allowances . .	10a					
b Less: cost of goods sold . .	10b					
c Net income or (loss) from sales of inventory . . ▶						
Miscellaneous Revenue		Business Code				
11a Telcom and IT Services		900099	703,439			703,439
b Administrative Service		900099	526,378			526,378
c						
d All other revenue			539,896			539,896
e **Total.** Add lines 11a–11d . . . . . ▶			1,769,713			
12 **Total revenue.** See instructions . . . . . ▶			169,353,912	3,543,509	-1,288,438	29,861,300

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX . . . . . ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	152,944,994	152,944,994		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	175,647	175,647		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	1,564,992	429,327	1,135,665	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	127,327		127,327	
7 Other salaries and wages	2,279,870	625,440	1,654,430	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	486,194	142,029	344,165	
10 Payroll taxes	324,129	94,686	229,443	
11 Fees for services (non-employees):				
a Management	26,126		26,126	
b Legal				
c Accounting	256,177		256,177	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	125,079	104,358	20,721	
12 Advertising and promotion	24,509	13,092	11,417	
13 Office expenses	202,152	88,542	113,610	
14 Information technology	406,758	113,644	293,114	
15 Royalties				
16 Occupancy	847,100	478,363	368,737	
17 Travel	14,673	31	14,642	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	32,439	12,469	19,970	
20 Interest	102,002		102,002	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization				
23 Insurance	99,807		99,807	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a				
b				
c				
d				
e All other expenses	318,649	243,077	75,572	
25 **Total functional expenses.** Add lines 1 through 24e	160,358,624	155,465,699	4,892,925	0
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ▶ ☐ if following SOP 98-2 (ASC 958-720).				

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part IX . . . . . ☐

			(A) Beginning of year		(B) End of year
Assets	1	Cash–non-interest-bearing	59,671,131	1	83,275,474
	2	Savings and temporary cash investments	107,932,488	2	97,421,571
	3	Pledges and grants receivable, net	38,082,473	3	30,802,234
	4	Accounts receivable, net	2,766,410	4	6,173,857
	5	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7	Notes and loans receivable, net	4,133,831	7	3,845,795
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges		9	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D — 10a			
	b	Less: accumulated depreciation — 10b		10c	
	11	Investments—publicly traded securities	235,687,204	11	317,250,363
	12	Investments—other securities. See Part IV, line 11	415,573,256	12	479,573,019
	13	Investments—program-related. See Part IV, line 11		13	
	14	Intangible assets		14	
	15	Other assets. See Part IV, line 11	68,612,306	15	66,787,674
	16	**Total assets.** Add lines 1 through 15 (must equal line 33)	932,459,099	16	1,085,129,987
Liabilities	17	Accounts payable and accrued expenses	10,329,632	17	13,017,687
	18	Grants payable	11,825,403	18	5,244,318
	19	Deferred revenue	8,460,505	19	12,269,873
	20	Tax-exempt bond liabilities	5,795,000	20	5,430,000
	21	Escrow or custodial account liability. Complete Part IV of Schedule D	16,901,000	21	19,010,000
	22	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23	Secured mortgages and notes payable to unrelated third parties		23	
	24	Unsecured notes and loans payable to unrelated third parties	14,293,620	24	5,750,360
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24). Complete Part X of Schedule D	185,432,125	25	223,628,629
	26	**Total liabilities.** Add lines 17 through 25	253,037,285	26	284,350,867
Net Assets or Fund Balances		**Organizations that follow FASB ASC 958, check here ▶ ☑ and complete lines 27, 28, 32, and 33.**			
	27	Net assets without donor restrictions	464,740,958	27	552,768,579
	28	Net assets with donor restrictions	214,680,856	28	248,010,541
		Organizations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 29 through 33.			
	29	Capital stock or trust principal, or current funds		29	
	30	Paid-in or capital surplus, or land, building or equipment fund		30	
	31	Retained earnings, endowment, accumulated income, or other funds		31	
	32	Total net assets or fund balances	679,421,814	32	800,779,120
	33	Total liabilities and net assets/fund balances	932,459,099	33	1,085,129,987

Part XI Reconcilliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI . . . . . ☑

1	Total revenue (must equal Part VIII, column (A), line 12)	1	169,353,912
2	Total expenses (must equal Part IX, column (A), line 25)	2	160,358,624
3	Revenue less expenses. Subtract line 2 from line 1	3	8,995,288
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	679,421,814
5	Net unrealized gains (losses) on investments	5	97,723,449
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	14,638,569
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column	10	800,779,120

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII . . . . . ☐

			Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☑ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		No
	If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes	
	If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☐ Separate basis ☑ Consolidated basis ☐ Both consolidated and separate basis			
c	If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	Yes	
	If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a	Yes	
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.	3b	Yes	

Additional Data

Return to Form

Software ID:

Software Version:

Form 990, Special Condition Description:

Special Condition Description

SCHEDULE A (Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ **Attach to Form 990 or Form 990-EZ.**

▶ **Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Jewish Federation of Metropolitan Chicago

Employer identification number
36-2167761

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 or 990-EZ).)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state:

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☑ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)

9 ☐ An agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture. See instructions. Enter the name, city, and state of the college or university:

10 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)

11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**

12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**

b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**

c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**

d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**

e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations . . . . . _____

g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document? Yes	(iv) No	(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
Total						

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)** (Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization failed to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . .	120,269,952	98,485,398	192,796,967	155,849,897	137,237,541	704,639,755
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge. .						
4 **Total.** Add lines 1 through 3	120,269,952	98,485,398	192,796,967	155,849,897	137,237,541	704,639,755
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f). .						21,422,459
6 **Public support.** Subtract line 5 from line 4.						683,217,296

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
7 Amounts from line 4. .	120,269,952	98,485,398	192,796,967	155,849,897	137,237,541	704,639,755
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . .	570,184	1,563,920	3,937,159	2,437,482	2,894,501	11,403,246
9 Net income from unrelated business activities, whether or not the business is regularly carried on. .	820,509	708,413				1,528,922
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.). .	2,773,351	1,505,345	1,111,490	1,677,701	1,769,713	8,837,600
11 **Total support.** Add lines 7 through 10						726,409,523

12 Gross receipts from related activities, etc. (see instructions) 12 17,150,784

13 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . . . ▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2020 (line 6, column (f) divided by line 11, column (f)) . . . . . 14 94.050 %

15 Public support percentage for 2019 Schedule A, Part II, line 14 . . . . . 15 93.390 %

16a **33 1/3% support test—2020.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . ▶ ☑

b **33 1/3% support test—2019.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . ▶ ☐

17a **10%-facts-and-circumstances test—2020.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ▶ ☐

b **10%-facts-and-circumstances test—2019.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ▶ ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . . ▶ ☐

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . .						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year.						
c Add lines 7a and 7b. .						
8 **Public support.** (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
9 Amounts from line 6. . .						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . .						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c Add lines 10a and 10b.						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on.						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . .						
13 **Total support.** (Add lines 9, 10c, 11, and 12.). .						

14 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**. . . . . ▶☐

Section C. Computation of Public Support Percentage

15	Public support percentage for 2020 (line 8, column (f) divided by line 13, column (f))	15	
16	Public support percentage from 2019 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage

17	Investment income percentage for **2020** (line 10c, column (f) divided by line 13, column (f))	17	
18	Investment income percentage from **2019** Schedule A, Part III, line 17	18	

19a **33 1/3% support tests—2020.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . ▶☐

b **33 1/3% support tests—2019.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . ▶☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions . . . . ▶☐

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, of Part I, complete Sections A and B. If you checked box 12b, of Part I, complete Sections A and C. If you checked box 12c, of Part I, complete Sections A, D, and E. If you checked box 12d, of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

			Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? *If "No," describe in* ***Part VI*** *how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.*	1		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? *If "Yes," explain in* ***Part VI*** *how the organization determined that the supported organization was described in section 509(a)(1) or (2).*	2		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? *If "Yes," answer lines 3b and 3c below.*	3a		
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? *If "Yes," describe in* ***Part VI*** *when and how the organization made the determination.*	3b		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? *If "Yes," explain in* ***Part VI*** *what controls the organization put in place to ensure such use.*	3c		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? *If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.*	4a		
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? *If "Yes," describe in* ***Part VI*** *how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.*	4b		
c	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? *If "Yes," explain in* ***Part VI*** *what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.*	4c		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? *If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in* ***Part VI,*** *including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).*	5a		
b	**Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b		
c	**Substitutions only.** Was the substitution the result of an event beyond the organization's control?	5c		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? *If "Yes," provide detail in* ***Part VI.***	6		
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ) .*	7		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).*	8		
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? *If "Yes," provide detail in* ***Part VI.***	9a		
b	Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? *If "Yes," provide detail in* ***Part VI.***	9b		
c	Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? *If "Yes," provide detail in* ***Part VI.***	9c		
10a	Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? *If "Yes," answer line 10b below.*	10a		
b	Did the organization have any excess business holdings in the tax year? *(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings).*	10b		

Part IV Supporting Organizations (continued)

			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
a	A person who directly or indirectly controls, either alone or together with persons described in lines 11b and 11c below, the governing body of a supported organization?	**11a**		
b	A family member of a person described in 11a above?	**11b**		
c	A 35% controlled entity of a person described in line 11a or 11b above? *If "Yes" to 11a, 11b, or 11c, provide detail in* ***Part VI****.*	**11c**		

Section B. Type I Supporting Organizations

			Yes	No
1	Did the officers, directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? *If "No," describe in* ***Part VI*** *how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.*	**1**		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? *If "Yes," explain in* ***Part VI*** *how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization.*	**2**		

Section C. Type II Supporting Organizations

			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? *If "No," describe in* ***Part VI*** *how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).*	**1**		

Section D. All Type III Supporting Organizations

			Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	**1**		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? *If "No," explain in* ***Part VI*** *how the organization maintained a close and continuous working relationship with the supported organization(s).*	**2**		
3	By reason of the relationship described in line 2 above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? *If "Yes," describe in* ***Part VI*** *the role the organization's supported organizations played in this regard.*	**3**		

Section E. Type III Functionally-Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year **(see instructions)**:

- **a** ☐ The organization satisfied the Activities Test. Complete **line 2** below.
- **b** ☐ The organization is the parent of each of its supported organizations. Complete **line 3** below.
- **c** ☐ The organization supported a governmental entity. Describe in **Part VI** how you supported a government entity (see instructions)

2 Activities Test. **Answer lines 2a and 2b below.**

			Yes	No
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If "Yes," then in* ***Part VI identify those supported organizations and explain*** *how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.*	**2a**		
b	Did the activities described in line 2a constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If "Yes," explain in* ***Part VI*** *the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.*	**2b**		

3 Parent of Supported Organizations. **Answer lines 3a and 3b below.**

a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? *If "Yes" or "No" provide details in* ***Part VI.***	**3a**		
b	Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? *If "Yes," describe in* ***Part VI.*** *the role played by the organization in this regard.*	**3b**		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 *(explain in **Part VI**)*. **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income

			(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	**1**		
2	Recoveries of prior-year distributions	**2**		
3	Other gross income (see instructions)	**3**		
4	Add lines 1 through 3	**4**		
5	Depreciation and depletion	**5**		
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	**6**		
7	Other expenses (see instructions)	**7**		
8	**Adjusted Net Income** (subtract lines 5, 6 and 7 from line 4)	**8**		

Section B - Minimum Asset Amount

			(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):	**1**		
a	Average monthly value of securities	**1a**		
b	Average monthly cash balances	**1b**		
c	Fair market value of other non-exempt-use assets	**1c**		
d	**Total** (add lines 1a, 1b, and 1c)	**1d**		
e	**Discount** claimed for blockage or other factors (*explain in detail in **Part VI***):			
2	Acquisition indebtedness applicable to non-exempt use assets	**2**		
3	Subtract line 2 from line 1d	**3**		
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	**4**		
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	**5**		
6	Multiply line 5 by 0.035	**6**		
7	Recoveries of prior-year distributions	**7**		
8	**Minimum Asset Amount** (add line 7 to line 6)	**8**		

Section C - Distributable Amount

			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	**1**	
2	Enter 85% of line 1	**2**	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	**3**	
4	Enter greater of line 2 or line 3	**4**	
5	Income tax imposed in prior year	**5**	
6	**Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	**6**	

7 ☐ Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)

Part V **Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** (continued)

Section D - Distributions		**Current Year**
1 Amounts paid to supported organizations to accomplish exempt purposes	**1**	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	**2**	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	**3**	
4 Amounts paid to acquire exempt-use assets	**4**	
5 Qualified set-aside amounts (*prior IRS approval required - provide details in* ***Part VI***)	**5**	
6 Other distributions (*describe in* ***Part VI***). See instructions	**6**	
7 **Total annual distributions.** Add lines 1 through 6.	**7**	
8 Distributions to attentive supported organizations to which the organization is responsive (*provide details in* ***Part VI***). See instructions	**8**	
9 Distributable amount for 2020 from Section C, line 6	**9**	
10 Line 8 amount divided by Line 9 amount	**10**	

Section E - Distribution Allocations (see instructions)	**(i) Excess Distributions**	**(ii) Underdistributions Pre-2020**	**(iii) Distributable Amount for 2020**
1 Distributable amount for 2020 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2020 (reasonable cause required-- *explain in* ***Part VI***). See instructions.			
3 Excess distributions carryover, if any, to 2020:			
a From 2015.			
b From 2016.			
c From 2017.			
d From 2018.			
e From 2019.			
f **Total** of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2020 distributable amount			
i Carryover from 2015 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2020 from Section D, line 7: $			
a Applied to underdistributions of prior years			
b Applied to 2020 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2020, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, *explain in* ***Part VI***. See instructions.			
6 Remaining underdistributions for 2020. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, *explain in* ***Part VI***. See instructions.			
7 **Excess distributions carryover to 2021.** Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2016.			
b Excess from 2017.			
c Excess from 2018.			
d Excess from 2019.			
e Excess from 2020.			

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

Return Reference	Explanation
Schedule A, Part II, Line 10, Explanation of Other Income:	Communications - 2016 Amount: $ 198,976. 2017 Amount: $ 181,996. 2018 Amount: $ 185,560. Telcom and IT Services - 2016 Amount: $ 508,224. 2017 Amount: $ 547,234. 2018 Amount: $ 493,512. 2019 Amount: $ 546,976. 2020 Amount: $ 703,439. Administrative Services - 2016 Amount: $ 814,581. 2017 Amount: $ 756,959. 2018 Amount: $ 272,555. 2019 Amount: $ 393,948. 2020 Amount: $ 526,378. Miscellaneous Revenue - 2016 Amount: $ 1,251,570. 2017 Amount: $ 19,156. 2018 Amount: $ 159,863. 2019 Amount: $ 736,777. 2020 Amount: $ 539,896.

Additional Data

Return to Form

Software ID:

Software Version:

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	**Schedule of Contributors** ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to www.irs.gov/Form990 for the latest information.	OMB No. 1545-0047 **2020**

Name of the organization	**Employer identification number**
Jewish Federation of Metropolitan Chicago	36-2167761

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☐ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

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

General Rule

☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . . . . . ▶ $ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
Jewish Federation of Metropolitan Chicago

Employer identification number
36-2167761

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

Contributors

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
RESTRICTED		$ RESTRICTED	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization
Jewish Federation of Metropolitan Chicago

Employer identification number
36-2167761

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

Name of organization
Jewish Federation of Metropolitan Chicago

Employer identification number
36-2167761

Part III ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of $1,000 or less for the year. (Enter this information once. See instructions.)** ▶ $ _____

Use duplicate copies of Part III if additional space is needed.

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

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

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

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

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

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

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

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

Additional Data

Return to Form

Software ID:

Software Version:

SCHEDULE C
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

▶**Complete if the organization is described below.** ▶**Attach to Form 990 or Form 990-EZ.**
▶**Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

If the organization answered "Yes" on Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes" on Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes" on Form 990, Part IV, Line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of the organization	Employer identification number
Jewish Federation of Metropolitan Chicago	36-2167761

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

1 Provide a description of the organization's direct and indirect political campaign activities in Part IV (see instructions for definition of "political campaign activities")

2 Political campaign activity expenditures (see instructions) ▶ $

3 Volunteer hours for political campaign activities (see instructions)

Part I-B Complete if the organization is exempt under section 501(c)(3).

1 Enter the amount of any excise tax incurred by the organization under section 4955 $

2 Enter the amount of any excise tax incurred by organization managers under section 4955 $

3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ☐ Yes ☐ No

4a Was a correction made? ☐ Yes ☐ No

b If "Yes," describe in Part IV.

Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).

1 Enter the amount directly expended by the filing organization for section 527 exempt function activities $

2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ▶ $

3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ▶ $

4 Did the filing organization file **Form 1120-POL** for this year? ☐ Yes ☐ No

5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

	(a) Name	**(b)** Address	**(c)** EIN	**(d)** Amount paid from filing organization's funds. If none, enter -0-.	**(e)** Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.
1					
2					
3					
4					
5					
6					

Part II-A **Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

A Check ▶ ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).

B Check ▶ ☐ if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)	(a) Filing organization's totals	(b) Affiliated group totals
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)		
b Total lobbying expenditures to influence a legislative body (direct lobbying)		
c Total lobbying expenditures (add lines 1a and 1b)		
d Other exempt purpose expenditures		
e Total exempt purpose expenditures (add lines 1c and 1d)		
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.		

If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:
Not over $500,000	20% of the amount on line 1e.
Over $500,000 but not over $1,000,000	$100,000 plus 15% of the excess over $500,000.
Over $1,000,000 but not over $1,500,000	$175,000 plus 10% of the excess over $1,000,000.
Over $1,500,000 but not over $17,000,000	$225,000 plus 5% of the excess over $1,500,000.
Over $17,000,000	$1,000,000.

g Grassroots nontaxable amount (enter 25% of line 1f)		
h Subtract line 1g from line 1a. If zero or less, enter -0-.		
i Subtract line 1f from line 1c. If zero or less, enter -0-.		

j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? ☐ **Yes** ☐ **No**

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period

Calendar year (or fiscal year beginning in)	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) Total
2a Lobbying nontaxable amount					
b Lobbying ceiling amount (150% of line 2a, column(e))					
c Total lobbying expenditures					
d Grassroots nontaxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.		(a) Yes	(a) No	(b) Amount
1	During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a	Volunteers?	Yes		
b	Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?	Yes		
c	Media advertisements?		No	
d	Mailings to members, legislators, or the public?		No	
e	Publications, or published or broadcast statements?		No	
f	Grants to other organizations for lobbying purposes?		No	
g	Direct contact with legislators, their staffs, government officials, or a legislative body?	Yes		784,206
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?		No	
i	Other activities?		No	
j	Total. Add lines 1c through 1i			784,206
2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		No	
b	If "Yes," enter the amount of any tax incurred under section 4912			
c	If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

			Yes	No
1	Were substantially all (90% or more) dues received nondeductible by members?	1		
2	Did the organization make only in-house lobbying expenditures of $2,000 or less?	2		
3	Did the organization agree to carry over lobbying and political expenditures from the prior year?	3		

Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."

1	Dues, assessments and similar amounts from members	1	
2	Section 162(e) nondeductible lobbying and political expenditures **(do not include amounts of political expenses for which the section 527(f) tax was paid).**		
a	Current year	2a	
b	Carryover from last year	2b	
c	Total	2c	
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5	Taxable amount of lobbying and political expenditures (see instructions)	5	

Part IV Supplemental Information

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions), and Part II-B, line 1. Also, complete this part for any additional information.

Return Reference	Explanation
Part II-B, Line 1:	During the fiscal year ended June 30, 2021, the Jewish Federation of Metropolitan Chicago maintained offices in Springfield, Illinois and Washington D.C. and a desk in Chicago, Illinois with the primary purpose of monitoring legislation, which would directly affect not for profit organizations and services. In connection with these activities, the staffs of the Federation at these offices stand in readiness to assist legislators by offering their expertise in matters of operation and management of such organizations and the defining of the positions of such agencies in regard to such legislation. This includes activities such as testifying before legislative committees, preparation of position papers and circulation of information on current developments to our constituency.

Additional Data

Return to Form

Software ID:

Software Version:

SCHEDULE D (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ **Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**
▶ **Attach to Form 990.**
▶ **Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Jewish Federation of Metropolitan Chicago

Employer identification number
36-2167761

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

		(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year	1,006	
2	Aggregate value of contributions to (during year)	55,292,000	
3	Aggregate value of grants from (during year)	43,645,000	
4	Aggregate value at end of year	270,313,000	

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☑ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☑ Yes ☐ No

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (e.g., recreation or education)
☐ Preservation of an historically important land area
☐ Protection of natural habitat
☐ Preservation of a certified historic structure
☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

		Held at the End of the Year
a	Total number of conservation easements	2a	
b	Total acreage restricted by conservation easements	2b	
c	Number of conservation easements on a certified historic structure included in (a)	2c	
d	Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d	

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ $ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 ▶ $ _____

(ii) Assets included in Form 990, Part X ▶ $ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 ▶ $ _____

b Assets included in Form 990, Part X ▶ $ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets *(continued)*

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

- **a** ☐ Public exhibition
- **b** ☐ Scholarly research
- **c** ☐ Preservation for future generations
- **d** ☐ Loan or exchange programs
- **e** ☐ Other .....

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?. . . ☐ **Yes** ☐ **No**

Part IV Escrow and Custodial Arrangements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? . . . . . ☐ **Yes** ☑ **No**

b If "Yes," explain the arrangement in Part XIII and complete the following table:

		Amount
c	Beginning balance	**1c**
d	Additions during the year	**1d**
e	Distributions during the year	**1e**
f	Ending balance	**1f**

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? . . . ☑ **Yes** ☐ **No**

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII . . . . ☑

Part V Endowment Funds.

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

		(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a	Beginning of year balance	424,866,280	368,372,853	356,336,853	344,111,853	322,440,853
b	Contributions . . .	22,284,939	63,535,748	35,769,000	24,516,000	26,964,000
c	Net investment earnings, gains, and losses	56,713,648	16,822,322	10,949,000	23,360,000	33,266,000
d	Grants or scholarships . . .					
e	Other expenditures for facilities and programs . . .	59,854,370	23,864,643	34,682,000	35,651,000	38,559,000
f	Administrative expenses					
g	End of year balance	444,010,497	424,866,280	368,372,853	356,336,853	344,111,853

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- **a** Board designated or quasi-endowment ▶ 63.015 %
- **b** Permanent endowment ▶ 12.916 %
- **c** Term endowment ▶ 24.069 %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

		Yes	No
(i) Unrelated organizations	**3a(i)**		No
(ii) Related organizations	**3a(ii)**	Yes	
b If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R?	**3b**	Yes	

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other				
Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, column (B), line 10(c).)* . . ▶				0

Part VII Investments—Other Securities.
Complete if the organization answered "Yes" on Form 990, Part IV, line 11b.See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A) Private Equity Funds	154,432,773	F
(B) Real Asset Funds	30,854,936	F
(C) State of Israel Bonds	3,294,065	F
(D) Other Investments	1,806,303	F
(E) Emerging Markets Equity	25,787,426	F
(F) Developed International Equity	105,736,666	F
(G) Hedged Equity	101,727,792	F
(H) Credit Funds	35,553,667	F
(I) Real Estate	20,379,391	F
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 12.)* ▶	479,573,019	

Part VIII Investments—Program Related.
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
Total. *(Column (b) must equal Form 990, Part X, col.(B) line 13.)* ▶		

Part IX Other Assets.
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)Beneficial Interest in Charitable Trust	41,416,659
(2)Due from JFMC Facilities Corporation	23,800,619
(3)Due from Jewish United Fund of Metropolitan Chicago	769,608
(4)Other Assets	800,788
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
Total. *(Column (b) must equal Form 990, Part X, col.(B) line 15.)* ▶	66,787,674

Part X Other Liabilities.
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f.
See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col.(B) line 25.)* ▶	223,628,629

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII ☑

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements			1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:				
a	Net unrealized gains (losses) on investments	2a			
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	
3	Subtract line **2e** from line **1**			3	
4	Amounts included on Form 990, Part VIII, line 12, but not on line **1**:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	
5	Total revenue. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 12.)			5	

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements			1	
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:				
a	Donated services and use of facilities	2a			
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	
3	Subtract line **2e** from line **1**			3	
4	Amounts included on Form 990, Part IX, line 25, but not on line **1:**				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	
5	Total expenses. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 18.)			5	

Part XIII Supplemental Information

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part lV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Return Reference	Explanation
Part IV, Line 2b:	The Federation acts as custodian of funds held on behalf of others. A summary of funds is as follows: -Send a Kid to Israel Program reserve fund; -Health, dental and vision insurance fund; -Unemployment compensation reserve fund; -Bar/Bat Mitzvah Registry
Part V, Line 4:	To provide funding for the Jewish Federation of Metropolitan Chicago / Jewish United Fund of Metropolitan affiliated agency and beneficiary agency programs.
Part X, Line 2:	The Jewish Federation of Metropolitan Chicago, an Illinois not-for-profit corporation, is exempt from income taxes under Section 501(c)(3) of the Internal Revenue Code and applicable state law. However, income from certain activities not directly related to the Federation's tax-exempt purposes, such as unrelated business income allocated from investment partnerships, is subject to taxation. The accounting standard on accounting for uncertainty in income taxes addresses the determination of whether tax benefits claimed or expected to be claimed on a tax return should be recorded in the financial statements. Under this guidance, the Federation may recognize the tax benefit from an uncertain tax position only if it is more likely than not that the tax position will be sustained on examination by taxing authorities, based on the technical merits of the position. Examples of tax positions include the tax-exempt status of the Federation and various positions related to the potential sources of unrelated business taxable income. The tax benefits recognized in the financial statements from such a position are measured based on the largest benefit that has a greater than 50 percent likelihood of being realized upon ultimate settlement. At June 30, 2021 and 2020, there were no unrecognized tax benefits identified or recorded as liabilities. The Federation files Forms 990 and 990-T in the U.S. federal jurisdiction and the State of Illinois. The Federation is generally no longer subject to examination by the Internal Revenue Service for years before fiscal year 2018.

Additional Data

Return to Form

Software ID:

Software Version:

Part III **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	**(b)** Number of recipients	**(c)** Amount of cash grant	**(d)** Amount of noncash assistance	**(e)** Method of valuation (book, FMV, appraisal, other)	**(f)** Description of noncash assistance
(1) Israel Experience	69	63,949			
(2) Scholarships/Awards	31	45,919			
(3) Grants	2	625			
(4) Stipends	214	65,154			
(4)					
(5)					
(6)					
(7)					

Part IV **Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

Return Reference	Explanation
Part I, Line 2:	Grants made by the Jewish Federation of Metropolitan Chicago (The Federation) in the United States are monitored through an extensive process involving professionals and nearly 200 volunteers that includes submission of budgetary and programmatic information as well as face to face meetings with many of the grant recipients. The process entails submission and review of fiscal information (including updated budgets and audits) as well as program specific information including outcome measures when appropriate. Grants made to the Federation are then allocated to various affiliated agencies which have a long relationship with the Federation and notwithstanding this, both lay and professional leadership continue to assess the use of grants that are provided to them. The review is accompanied by face to face visits in which programs funded by the Federation are reviewed. The Federation also takes advantage of information that the grantees provide to accrediting and other funding bodies. In addition, the majority of grants presented on Schedule I are distributions made from Donor Advised Funds where the donor recommends grants to a variety of 501(c)(3) organizations.

Additional Data

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Software ID:

Software Version:

Schedule J (Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 23.**

▶ **Attach to Form 990.**

▶ **Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Jewish Federation of Metropolitan Chicago

Employer identification number
36-2167761

Part I Questions Regarding Compensation

			Yes	No
1a	Check the appropiate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.			
	☐ First-class or charter travel	☐ Housing allowance or residence for personal use		
	☐ Travel for companions	☐ Payments for business use of personal residence		
	☑ Tax idemnification and gross-up payments	☑ Health or social club dues or initiation fees		
	☐ Discretionary spending account	☐ Personal services (e.g., maid, chauffeur, chef)		
b	If any of the boxes on Line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain	**1b**	Yes	
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked on Line 1a?	**2**	Yes	
3	Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.			
	☑ Compensation committee	☐ Written employment contract		
	☐ Independent compensation consultant	☑ Compensation survey or study		
	☐ Form 990 of other organizations	☑ Approval by the board or compensation committee		
4	During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:			
a	Receive a severance payment or change-of-control payment?	**4a**		No
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	**4b**	Yes	
c	Participate in, or receive payment from, an equity-based compensation arrangement?	**4c**		No
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.			
	Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.			
5	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:			
a	The organization?	**5a**		No
b	Any related organization?	**5b**		No
	If "Yes," on line 5a or 5b, describe in Part III.			
6	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:			
a	The organization?	**6a**		No
b	Any related organization?	**6b**		No
	If "Yes," on line 6a or 6b, describe in Part III.			
7	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III	**7**		No
8	Were any amounts reported on Form 990, Part VII, paid or accured pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III	**8**		No
9	If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	**9**		

Part II **Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

Note. The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		**(B)** Breakdown of W-2 and/or 1099-MISC compensation			**(C)** Retirement and other deferred compensation	**(D)** Nontaxable benefits	**(E)** Total of columns (B)(i)-(D)	**(F)** Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	**(ii)** Bonus & incentive compensation	**(iii)** Other reportable compensation				
1Dr Steven B Nasatir PhD Executive Vice Chairman	**(i)**	390,871	0	71,427	0	14,837	477,135	0
	(ii)	36,310	0	6,635	0	1,378	44,323	0
2Lonnie Nasatir President	**(i)**	186,104	0	14,169	5,406	7,457	213,136	0
	(ii)	227,460	0	17,318	6,608	9,114	260,500	0
3Jay Tcath Executive Vice President	**(i)**	145,183	0	731	33,226	4,358	183,498	0
	(ii)	184,779	0	930	42,288	5,546	233,543	0
4David S Rosen Senior VP - Endowments	**(i)**	377,492	0	31,297	25,548	12,907	447,244	25,000
	(ii)	0	0	0	0	0	0	0
5Rabbi Louis A Lazovsky Vice President - Human Resources	**(i)**	26,740	0	293	8,620	1,001	36,654	0
	(ii)	240,657	0	2,637	77,584	9,009	329,887	0
6David S Rubovits PhD Chief Operating Officer	**(i)**	0	0	0	0	0	0	0
	(ii)	272,473	0	1,661	68,193	10,990	353,317	0
7Boaz Blumovitz Chief Financial Officer	**(i)**	88,284	0	150	5,685	210	94,329	0
	(ii)	238,693	0	406	15,369	567	255,035	0
8James Rosenberg Chief of Staff	**(i)**	0	0	0	0	0	0	0
	(ii)	271,949	0	557	55,941	1,294	329,741	0
9James A Pinkston Vice President - Accountin	**(i)**	35,200	0	313	2,386	1,568	39,467	0
	(ii)	246,399	0	2,188	16,700	10,979	276,266	0
10John Lowenstein VP Campus Affairs & Student Eng.	**(i)**	253,382	0	0	40,508	7,898	301,788	0
	(ii)	0	0	0	0	0	0	0
11Deborah Covington Senior VP Planning & Allocation	**(i)**	9,494	0	0	4,906	377	14,777	0
	(ii)	180,391	0	0	93,221	7,172	280,784	0
12David Prystowsky Vice President - Campaign	**(i)**	0	0	0	0	0	0	0
	(ii)	233,375	0	0	26,443	10,270	270,088	0
13Robert Schuckman VP - General Counsel	**(i)**	169,548	0	4,344	31,406	10,624	215,922	0
	(ii)	42,387	0	1,086	7,852	2,656	53,981	0
14Peter Chiswick Sr Assoc V.P. & Dir, JUF Invest.	**(i)**	0	0	0	0	0	0	0
	(ii)	209,626	0	5,347	47,294	7,507	269,774	0
15Rose Jagust VP Donor Advised Funds	**(i)**	170,823	0	4,232	43,084	13,152	231,291	0
	(ii)	0	0	0	0	0	0	0
16Scott Aaron Associate VP JUF Education	**(i)**	199,424	0	445	18,688	12,137	230,694	0
	(ii)	0	0	0	0	0	0	0
17Audra P Berg VP, Leadership Eng. & Board Rel.	**(i)**	0	0	0	0	0	0	0
	(ii)	171,541	0	67	18,996	8,851	199,455	0
18Tracy More V.P. Cmty. Outreach & Eng. Officer	**(i)**	161,751	0	0	0	16,336	178,087	0
	(ii)	0	0	0	0	0	0	0
19Michael Simon Executive Director Fiedler Hillel	**(i)**	164,071	0	337	13,857	1,122	179,387	0
	(ii)	0	0	0	0	0	0	0
20Anna Levin Executive Dir University of Chicago	**(i)**	149,990	0	0	2,195	9,594	161,779	0
	(ii)	0	0	0	0	0	0	0
21Joel Poupko Rabbinic Scholar	**(i)**	192,483	0	4,894	25,877	6,573	229,827	0
	(ii)	0	0	0	0	0	0	0

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

Return Reference	Explanation
Part I, Line 1a	The Jewish Federation has agreed to provide Steven Nasatir with a split dollar $1,000,000 insured death benefit. The insurance is designed so that upon Steven Nasatir's death, the Federation will receive a benefit equal to all of the premiums paid. The life insurance benefit is provided tax free to Steven Nasatir so there is an additional cash payment to Steven Nasatir each year to cover the taxes on the PS58 costs as well as the taxes grossed up. Social club dues are paid on behalf of appropriate employees conducting business at a private city club. The social club dues are a non-taxable benefit. No country club dues are paid by the organization.
Part I, Line 4b	Steven B. Nasatir: In 1999 the Jewish Federation entered into an agreement with Steven Nasatir that was contingent upon 5 more years of service as president and CEO and would result in annual payments of $50,000 per year (net of tax) beginning at age 64 and lasting throughout his lifetime. Dr. Nasatir began receiving payments under this agreement in 2009. During 2012, the Jewish Federation entered into a second agreement with Steven Nasatir which provides for annual payments of $5,000 beginning April 1, 2015 and lasting throughout his lifetime. Dr. Nasatir vested in the following benefits: Benefit payments from the aforementioned agreements will continue for the longer of 1) 10 years through December 2028 or 2) his lifetime. In the event of his death prior to 2029, payments will be made to Dr. Nasatir's beneficiary. The $50,000 and $5,000 annual payment amounts are to be adjusted annually in accordance with the CPI index. In 2017, the Jewish Federation entered into a third agreement with Steven Nasatir which provides for annual payments of $21,000 per year, beginning in 2018, for the longer of his lifetime or ten years (through December 2027). In 2020, Steven Nasatir received payments totaling $106,428 from the three supplemental non-qualified retirement plans. David Rosen: The Jewish Federation has an agreement with David Rosen which provides for annual payments of $25,000 per year beginning in 2018 and ending in 2028. During 2017, the Jewish Federation entered into a second agreement with David Rosen which provides for annual payments of $25,000 beginnning in January 2022 and ending in 2032. This benefit is contingent on David Rosen maintaining his employment at Jewish Federation through January 1, 2022. Jay Tcath: JUF has an agreement with Jay Tcath that provides for annual payments of $25,000 for 10 years commencing upon his retirement from JUF or if he is no longer employed by JUF, upon reaching age 64. In July 2018, JUF entered a split dollar life insurance agreement with Jay Tcath that will provide a death benefit of $625,000 if he maintains his employment at JUF through June 2023. In addition, JUF and Mr. Tcath entered into another agreement that will provide 15 annual payments of approximately $33,000 per year if Mr. Tcath maintains his employment at JUF.

Additional Data

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

Schedule K (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information on Tax-Exempt Bonds

▶ **Complete if the organization answered "Yes" to Form 990, Part VI, line 24a. Provide descriptions, explanations, and any additional information in Part VI.**

▶ **Attach to Form 990.**

▶**Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Jewish Federation of Metropolitan Chicago

Employer identification number
36-2167761

Part I Bond Issues

	(a) Issuer name	(b) Issuer EIN	(c) CUSIP #	(d) Date issued	(e) Issue price	(f) Description of purpose	(g) Defeased		(h) On behalf of issuer		(i) Pool financing	
							Yes	No	Yes	No	Yes	No
A	CECFA - Series G3	84-0896727	19645RQN4	06-01-2012	5,015,000	Refund prior bond issues		X		X		X
B	CECFA - Series J1	84-0896727	NoneAvail	07-02-2012	5,150,000	Refund prior bond issues		X		X		X

Part II Proceeds

		A	B	C	D
1	Amount of bonds retired	3,325,000	1,410,000		
2	Amount of bonds legally defeased				
3	Total proceeds of issue	5,015,000	5,150,000		
4	Gross proceeds in reserve funds				
5	Capitalized interest from proceeds				
6	Proceeds in refunding escrows				
7	Issuance costs from proceeds	15,000	10,000		
8	Credit enhancement from proceeds				
9	Working capital expenditures from proceeds				
10	Capital expenditures from proceeds	5,000,000	5,140,000		
11	Other spent proceeds				
12	Other unspent proceeds				
13	Year of substantial completion	2012	2012		

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
14	Were the bonds issued as part of a current refunding issue of tax-exempt bonds (or, if issued prior to 2019, a current refunding issue)?	X		X					
15	Were the bonds issued as part of an advance refunding issue of taxable bonds (or, if issued prior to 2019, an advance refunding issue)?		X		X				
16	Has the final allocation of proceeds been made?	X		X					
17	Does the organization maintain adequate books and records to support the final allocation of proceeds?	X		X					

Part III Private Business Use

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
1	Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by tax-exempt bonds?		X		X				
2	Are there any lease arrangements that may result in private business use of bond-financed property?		X		X				

Part III Private Business Use (Continued)

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
3a	Are there any management or service contracts that may result in private business use of bond-financed property?		X		X				
b	If "Yes" to line 3a, does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts relating to the financed property?								
c	Are there any research agreements that may result in private business use of bond-financed property?		X		X				
d	If "Yes" to line 3c, does the organization routinely engage bond counsel or other outside counsel to review any research agreements relating to the financed property?								
4	Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government ▶								
5	Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another section 501(c)(3) organization, or a state or local government ▶								
6	Total of lines 4 and 5								
7	Does the bond issue meet the private security or payment test?		X		X				
8a	Has there been a sale or disposition of any of the bond-financed property to a nongovernmental person other than a 501(c)(3) organization since the bonds were issued?		X		X				
b	If "Yes" to line 8a, enter the percentage of bond-financed property sold or disposed of.								
c	If "Yes" to line 8a, was any remedial action taken pursuant to Regulations sections 1.141-12 and 1.145-2?								
9	Has the organization established written procedures to ensure that all nonqualified bonds of the issue are remediated in accordance with the requirements under Regulations sections 1.141-12 and 1.145-2?	X		X					

Part IV Arbitrage

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
1	Has the issuer filed Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate?		X		X				
2	If "No" to line 1, did the following apply?								
a	Rebate not due yet?		X		X				
b	Exception to rebate?		X		X				
c	No rebate due?	X		X					
	If "Yes" to line 2c, provide in Part VI the date the rebate computation was performed								
3	Is the bond issue a variable rate issue?	X		X					
4a	Has the organization or the governmental issuer entered into a qualified hedge with respect to the bond issue?		X		X				
b	Name of provider								
c	Term of hedge								
d	Was the hedge superintegrated?								
e	Was the hedge terminated?								

Part IV Arbitrage (Continued)

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
5a	Were gross proceeds invested in a guaranteed investment contract (GIC)?		X		X				
b	Name of provider								
c	Term of GIC								
d	Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied?								
6	Were any gross proceeds invested beyond an available temporary period?		X		X				
7	Has the organization established written procedures to monitor the requirements of section 148? . . .	X		X					

Part V Procedures To Undertake Corrective Action

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
Has the organization established written procedures to ensure that violations of federal tax requirements are timely identified and corrected through the voluntary closing agreement program if self-remediation is not available under applicable regulations?	X		X					

Part VI Supplemental Information. Provide additional information for responses to questions on Schedule K. (See instructions).

Return Reference	Explanation
Date Rebate Computation Performed	Issuer Name: CECFA - Series G3 Date the Rebate Computation was Performed: 07/12/2018 Issuer Name: CECFA - Series J1 Date the Rebate Computation was Performed: 04/19/2018
Part IV, Line 2c:	Bond counsel reviewed arbitrage rebate liability for the Series G3 and J1 bonds on July 12, 2018 and April 19, 2018, respectively. Bond counsel concluded that the bonds did not accrue any liability under the Rebate Law at any time during the applicable review period. The next arbitrage rebate liability review is not due until June 2023 for the Series G3 bond and July 2022 for the Series J1 bond.

Additional Data

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Software ID:

Software Version:

Schedule L
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Transactions with Interested Persons

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.**
▶ **Attach to Form 990 or Form 990-EZ.**
▶ **Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Jewish Federation of Metropolitan Chicago

Employer identification number
36-2167761

Part I Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and section 501(c)(29) organizations only).

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1 **(a)** Name of disqualified person	**(b)** Relationship between disqualified person and organization	**(c)** Description of transaction	**(d)** Corrected? Yes	No

2 Enter the amount of tax incurred by the organization managers or disqualified persons during the year under section 4958.

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ▶ $

Part II Loans to and/or From Interested Persons.

Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a, or Form 990, Part IV, line 26; or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22

(a) Name of interested person	**(b)** Relationship with organization	**(c)** Purpose of loan	**(d)** Loan to or from the organization? To	From	**(e)** Original principal amount	**(f)** Balance due	**(g)** In default? Yes	No	**(h)** Approved by board or committee? Yes	No	**(i)** Written agreement? Yes	No
Total ▶ $												

Part III Grants or Assistance Benefiting Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	**(b)** Relationship between interested person and the organization	**(c)** Amount of assistance	**(d)** Type of assistance	**(e)** Purpose of assistance

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	**(b)** Relationship between interested person and the organization	**(c)** Amount of transaction	**(d)** Description of transaction	**(e)** Sharing of organization's revenues?	
				Yes	**No**
(1) Associated Agencies Inc	See below	127,327	See below		No

Part V Supplemental Information

Provide additional information for responses to questions on Schedule L (see instructions).

Return Reference	Explanation
Schedule L, Part IV: (b)	Relationship between interested persons and the organization: Max Schrayer, Director, is the principal owner and CEO of Associated Agencies, Inc. Joshua B. Herz, Director, is the President of Associated Agencies, Inc.
Schedule L, Part IV: (b)	Description of Transaction: Associated Agencies, Inc. is JFMC's primary broker for liability insurance. During the year ended June 30, 2021, JFMC paid Associated Agencies, Inc. $127,327 for such insurance. JFMC regularly receives competitive bids from other insurance companies and Mr. Schrayer and Mr. Herz do not participate in any decision-making or voting regarding the purchase of insurance.

Additional Data

Return to Form

Software ID:

Software Version:

SCHEDULE M (Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions

▶**Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.**
▶ **Attach to Form 990.**
▶**Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Jewish Federation of Metropolitan Chicago

Employer identification number
36-2167761

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art—Works of art				
2 Art—Historical treasures				
3 Art—Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities—Publicly traded	X	793	19,908,307	Fair Market Value
10 Securities—Closely held stock				
11 Securities—Partnership, LLC, or trust interests				
12 Securities—Miscellaneous				
13 Qualified conservation contribution—Historic structures				
14 Qualified conservation contribution—Other				
15 Real estate—Residential				
16 Real estate—Commercial				
17 Real estate—Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ▶ (_____)				
26 Other ▶ (_____)				
27 Other ▶ (_____)				
28 Other ▶ (_____)				

			Yes	No
29	Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement	29		0
30a	During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?	30a		No
b	If "Yes," describe the arrangement in Part II.			
31	Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?	31	Yes	
32a	Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?	32a		No
b	If "Yes," describe in Part II.			
33	If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.			

Part II **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

Return Reference	Explanation
Part I, Column (b):	Is the number of contributions.

Additional Data

Return to Form

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SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.
▶ **Attach to Form 990 or 990-EZ.**
▶ **Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Jewish Federation of Metropolitan Chicago

Employer identification number
36-2167761

Return Reference	Explanation
Form 990, Part VI, Section A, line 2	Alison Karmin, Ex-Officio, and Deborah Schrayer Karmin , Vice Chairman, have a family relationship. Lonnie Nasatir, President, and Steven B. Nasatir, Executive Vice Chairman, have a family relationship. Eric Rothner, Director, and Avi Rothner, Director, have a family relationship. Max Schrayer, Director, and Deborah Schrayer Karmin, Director, have a family relationship. Max Schrayer, Director, and Joshua B. Herz, Director, have a business relationship.
Form 990, Part VI, Section A, line 6	Any person who makes payment of a contribution in an amount of not less than $25.00 to the Jewish Federation of Metropolitan Chicago (Federation) directly or to the Jewish United Fund of Metropolitan Chicago (JUF) to be used in whole or in part for budgetary purposes of the Federation shall be a voting member of the Federation and each of its affiliated organizations for the year in respect of which such payment is made and until final adjournment of the annual meeting of the Federation held the following year.
Form 990, Part VI, Section A, line 7a	At each election of Directors, a member shall have one vote for as many persons as there are Directors to be elected.
Form 990, Part VI, Section B, line 11b	A copy of the Form 990 was provided to the Board Chairman and all Audit Committee members prior to filing. The Audit Committee chairman then informed the full board of directors that committee members reviewed the Form 990 and a copy was made available to all board members.
Form 990, Part VI, Section B, line 12c	A conflict of interest questionnaire is circulated to all board members (directors), officers and key employees on an annual basis. This process is managed by a Federation staff member who ensures all questionnaires are completed. The completed questionnaires are reviewed by management and any conflicts are disclosed to the board of directors. If a director does have a conflict or business relationship with the Federation, he or she is required to abstain from any votes related to that matter.
Form 990, Part VI, Section B, line 15	The Federation has a Compensation Committee comprised of the Board Chairman, Immediate Past Board Chairman, Audit Committee Chairman, and Overall Planning and Allocations (Budget) Committee Chairman. This committee uses comparable data from other large nonprofit organizations to ensure compensation for Federation executives is consistent with the market, including but not limited to an annual Total Compensation Survey of large city Jewish Federations that is coordinated through the national Jewish Federations of North America organization and conducted each year by Korn Ferry, a nationally recognized expert in the field of compensation consulting. The compensation committee approves compensation for the President of the Federation and other officers and key employees. The approval of executive compensation is documented in the Compensation Committee's minutes.
Form 990, Part VI, Section C, line 18	The organization is a platinum-level Guidestar participant, demonstrating its commitment to transparency, and as such provides a link to Guidestar on its website for an electronic copy of the Form 990.
Form 990, Part VI, Section C, line 19	The organization's governing documents, conflict of interest policy and audited financial statements are made available to all volunteer members of the Board of Directors and are posted on its website. With regards to the Form 990 and 990-T, the organization provides these documents upon request for the same period of disclosure as set forth in IRC Section 6104(d).
Form 990, Part VII, Section B, Line 1:	Fees paid to RSM US LLP include amounts related to family supporting foundations which have their own separate tax returns and are not a part of this 990. The supporting foundations reimburse Jewish Federation for these costs.
Form 990, Part VIII, Line 1a:	The amount of $501,720 on line 1a of the Statement of Revenue is from the United Way of Metropolitan Chicago.
Form 990, Part XI, line 9:	Unrealized loss on beneficial interest in charitable trusts 8,678,144. Unrealized loss on fair value of swap arrangements 5,960,425.

Additional Data

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Software ID:

Software Version:

SCHEDULE R (Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.**
▶ **Attach to Form 990.**
▶ **Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Jewish Federation of Metropolitan Chicago

Employer identification number
36-2167761

Part I Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity? Yes	(g) No
(1)JFMC Facilities Corporation 30 South Wells Suite 4049 Chicago, IL 60606 36-3368912	Property Management of Related Non-Profit Organizations	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(2) Jewish United Fund of Metropolitan Chicago 30 South Wells Suite 4049 Chicago, IL 60606 36-2167034	Fundraising & Grantmaking	IL	501(c)(3)	Line 7	Jewish Federation of Metropolitan Chicago	Yes	
(3) Karl Perl Charitable Trust 30 South Wells Suite 4049 Chicago, IL 60606 46-6113637	Support the Jewish United Fund of Metropolitan Chicago	IL	501(c)(3)	Line 12a, I	Jewish United Fund of Metropolitan Chicago	Yes	
(4)IGRB Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4018186	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(5) Albert and Lucille Delighter and Marcella Winston Foundation 30 South Wells Suite 4049 Chicago, IL 60606 20-5488529	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(6) Bellows Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-3864415	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(7)BLS Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4420871	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(8) Bucksbaum Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4341914	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(9) Charles & Audrey Dann Charitable Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4018189	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(10) Chicago Center for Jewish Genetic Disorders 30 South Wells Suite 4049 Chicago, IL 60606 20-0120266	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(11) Covenant Foundation 1270 Avenue of the Americas Suite 3 New York, NY 10020 36-3722029	Supporting Foundation	NY	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(12) The First Spoke Foundation 30 South Wells Suite 4049 Chicago, IL 60606 20-0894628	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(13) Crown Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-3330462	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(14) Epstein Wenger Family Support Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4380168	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(15) Glickman Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-3857009	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(16) Goodman Supporting Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4018187	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(17) The Harriette and Ted Perlman Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 81-1309979	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(18) Harvey L Miller Supporting Foundation 30 South Wells Suite 4049 Chicago, IL 60606 90-0187252	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(19) Helene Diamond & Jorde Nathan Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4157242	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(20) Hillels of Illinois Endowment Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4310755	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(21) The SwartzbergZoller Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-3864416	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(22)JFMCP3 Corporation 30 South Wells Suite 4049 Chicago, IL 60606 26-2053862	Supporting Organization	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(23) Lawrence E & Nancy S Glick Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-3662985	Supporting Foundation	IL	501(c)(3)	Line 12b, II	Jewish Federation of Metropolitan Chicago	Yes	
(24) Leonard and Diane Sherman Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4345181	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(25) Manfred and Fern Steinfeld Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4244346	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(26) Michael Reese Health Trust 150 North Wacker Drive Suite 2320 Chicago, IL 60606 36-2170910	Grantmaking	IL	501(c)(3)	PF	Jewish Federation of Metropolitan Chicago	Yes	
(27) Prairie Minerals Foundation 30 South Wells Suite 4049 Chicago, IL 60606 32-0062771	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(28) The Pritzker Family Philanthropic Fund 71 S Wacker Drive Ste 4600 Chicago, IL 60606 36-3623264	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(29) Ring Family Supporting Foundation 30 South Wells Suite 4049 Chicago, IL 60606 20-1642012	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(30) Robert U & Roberta Goldman Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 20-3921714	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(31) Robert L & Sylvia M Haag Foundation 30 South Wells Suite 4049 Chicago, IL 60606 30-0149729	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(32) Rose Family Supporting Foundation 30 South Wells Suite 4049 Chicago, IL 60606 20-5389086	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(33) Seder Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-3988995	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(34) Shure Charitable Trust created uw of Sidney N Shure 30 South Wells Suite 4049 Chicago, IL 60606 36-7681597	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(35) Sisyphus Supporting Foundation 30 South Wells Suite 4049 Chicago, IL 60606 20-5944850	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(36) Tamar & Jonathan Koschitzky Family Foundation 30 South Wells Suite 4049 Chicago, IL 60606 30-0149723	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(37) The Robert and Yadelle Sklare Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4389423	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(38) Wagner Descendant's Foundation 30 South Wells Suite 4049 Chicago, IL 60606 20-4004517	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(39) Weiss Memorial Hospital Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-4413031	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	
(40)Z Frank Camp Apachi Supporting Foundation 30 South Wells Suite 4049 Chicago, IL 60606 36-3833108	Supporting Foundation	IL	501(c)(3)	Line 12a, I	Jewish Federation of Metropolitan Chicago	Yes	

Part III **Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations? Yes	(h) No	(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner? Yes	(j) No	(k) Percentage ownership
(1) 255 Revere Drive LP 30 S Wells Suite 4049 Chicago, IL 60606 36-3174413	Real Estate	IL	JFMC Facilities Corporation	N/A				No			No	
(2) JFMC Pooled Endowment Portfolio LLC 30 S Wells Suite 4049 Chicago, IL 60606 45-1610644	See Sch. R, Part VII	IL	Jewish Federation of Metropolitan Chicago	Investment	35,827,985	921,533,760		No	-965,670	Yes		83.840 %

Part IV **Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity? Yes	(i) No
(1) Charitable Remainder Unitrusts (19)	Charitable Trust	IL	Jewish Federation of Metropolitan Chicago	T				Yes	
(2) Charitable Remainder Annuity Trusts (3)	Charitable Trust	IL	Jewish Federation of Metropolitan Chicago	T				Yes	

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

		Yes	No
1	During the tax year, did the orgranization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
a	Receipt of **(i)** interest, **(ii)**annuities, **(iii)** royalties, or **(iv)** rent from a controlled entity	1a	No
b	Gift, grant, or capital contribution to related organization(s)	1b	Yes
c	Gift, grant, or capital contribution from related organization(s)	1c	Yes
d	Loans or loan guarantees to or for related organization(s)	1d	Yes
e	Loans or loan guarantees by related organization(s)	1e	No
f	Dividends from related organization(s)	1f	No
g	Sale of assets to related organization(s)	1g	No
h	Purchase of assets from related organization(s)	1h	No
i	Exchange of assets with related organization(s)	1i	No
j	Lease of facilities, equipment, or other assets to related organization(s)	1j	Yes
k	Lease of facilities, equipment, or other assets from related organization(s)	1k	No
l	Performance of services or membership or fundraising solicitations for related organization(s)	1l	No
m	Performance of services or membership or fundraising solicitations by related organization(s)	1m	No
n	Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n	No
o	Sharing of paid employees with related organization(s)	1o	No
p	Reimbursement paid to related organization(s) for expenses	1p	Yes
q	Reimbursement paid by related organization(s) for expenses	1q	No
r	Other transfer of cash or property to related organization(s)	1r	No
s	Other transfer of cash or property from related organization(s)	1s	No

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) Jewish United Fund of Metropolitan Chicago	P	4,296,854	Book Value
(2)JFMC Facilities Corporation	J	1,897,628	Book Value
(3)JFMC Facilities Corporation	D	102,138,000	Outstanding Debt & Loan Guarantee
(4) The SwartzbergZoller Family Foundation	C	115,000	Book Value
(5) Weiss Memorial Hospital Foundation	C	127,622	Book Value
(6) Charles & Audrey Dann Charitable Foundation	C	54,600	Book Value
(7) Albert and Lucille Delighter and Marcella Winston Foundation	C	75,000	Book Value
(8) Shure Charitable Trust	C	99,000	Book Value
(9) Glickman Foundation	C	100,000	Book Value
(10) Harvey L Miller Supporting Foundation	C	250,000	Book Value
(11) Tamar & Jonathan Koschitsky Family Foundation	C	450,000	Book Value
(12) Michael Reese Health Trust	C	1,229,543	Book Value
(13) Ring Family Supporting Foundation	C	1,811,997	Book Value
(14) Crown Family Foundation	C	6,906,000	Book Value
(15) The Pritzker Family Philanthropic Fund	C	8,125,000	Book Value
(16) The First Spoke Foundation	C	298,090	Book Value
(17) Jewish United Fund of Metropolitan Chicago	C	36,710,306	Book Value
(18) Jewish United Fund of Metropolitan Chicago	B	8,732,283	Book Value
(19)JFMC Facilities Corporation	B	16,846,465	Book Value

Part VI **Unrelated Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	

Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R. (see instructions).

Return Reference	Explanation

Additional Data

Return to Form

Software ID:

Software Version: