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

2022

Open to Public Inspection

A For the 2022 calendar year, or tax year beginning 07-01-2022 , and ending 06-30-2023

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

C Name of organization
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Doing business as
UJA-FEDERATION OF NEW YORK

Number and street (or P.O. box if mail is not delivered to street address) | Room/suite
130 EAST 59TH STREET

City or town, state or province, country, and ZIP or foreign postal code
NEW YORK, NY 100221302

D Employer identification number
51-0172429

E Telephone number
(212) 836-1730

G Gross receipts $ 824,988,000

F Name and address of principal officer:
ERIC S GOLDSTEIN
130 EAST 59TH STREET
NEW YORK,NY 10022

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.UJAFEDNY.ORG

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

L Year of formation: 1975

M State of legal domicile: NY

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities:
UJA-FEDERATION CARES FOR JEWS AND ALL NEW YORKERS,RESPONDS TO CRISES AND SHAPES THE JEWISH FUTURE.

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**	157
4	Number of independent voting members of the governing body (Part VI, line 1b)	**4**	157
5	Total number of individuals employed in calendar year 2022 (Part V, line 2a)	**5**	441
6	Total number of volunteers (estimate if necessary)	**6**	5,000
7a	Total unrelated business revenue from Part VIII, column (C), line 12	**7a**	2,535,000
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	**7b**	27,555

			Prior Year	Current Year
Revenue	**8**	Contributions and grants (Part VIII, line 1h)	234,500,000	209,215,000
	9	Program service revenue (Part VIII, line 2g)	1,131,000	1,157,000
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	62,054,000	56,922,000
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	-3,699,000	-5,110,000
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	293,986,000	262,184,000
Expenses	**13**	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	176,393,000	185,290,000
	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)	53,061,000	57,486,000
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	245,000	245,000
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶34,710,000		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	29,069,000	29,139,000
	18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	258,768,000	272,160,000
	19	Revenue less expenses. Subtract line 18 from line 12	35,218,000	-9,976,000

			Beginning of Current Year	End of Year
Net Assets or Fund Balances	**20**	Total assets (Part X, line 16)	1,607,931,000	1,608,029,000
	21	Total liabilities (Part X, line 26)	215,141,000	161,289,000
	22	Net assets or fund balances. Subtract line 21 from line 20	1,392,790,000	1,446,740,000

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 2024-05-14

▶ JOANN LOCASCIO CONTROLLER
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Firm's name ▶			Firm's EIN ▶	
Firm's address ▶			Phone no.	

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:

UJA-FEDERATION OF NEW YORK (UJA) CARES FOR JEWS EVERYWHERE AND NEW YORKERS OF ALL BACKGROUNDS, RESPONDS TO CRISES CLOSE TO HOME AND FAR AWAY, AND SHAPES THE JEWISH FUTURE. UJA PROVIDES FUNDING & OTHER RESOURCES TO OVER 400 ORGANIZATIONS INCLUDING A (CONT. ON SCHEDULE O) CORE NETWORK OF 65 HEALTH, HUMAN-SERVICE, EDUCATIONAL, & COMMUNITY-BUILDING INSTITUTIONS. ITS GOVERNMENT ADVOCACY HELPS THEM SECURE TENS OF MILLIONS OF DOLLARS ANNUALLY FOR SERVICES TO NEW YORKERS IN NEED. THROUGH RESEARCH AND CONVENING EXPERTS, UJA DELIVERS STRATEGIC SOLUTIONS TO EMERGING ISSUES AFFECTING THE JEWISH AND BROADER COMMUNITY. WHEN COVID STRUCK, UJA MOBILIZED ITS NETWORK AND RESOURCES TO HELP VULNERABLE NEW YORKERS AND DEVELOPED A PLAN TO ENSURE JEWISH INSTITUTIONS COULD CONTINUE TO SERVE THE COMMUNITY WHEN THE PANDEMIC ENDS. MORE RECENTLY, UJA HAS MOBILIZED ITS NETWORK OF PARTNERS AND GRANTEES TO RESPOND TO HUMANITARIAN CRISES, FROM THE WAR IN UKRAINE TO NATURAL DIASTERS BOTH DOMESTICALLY AND OVERSEAS.

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 $ 117,749,000 including grants of $ 103,342,000) (Revenue $)

CARING FOR PEOPLE IN NEED AND RESPONDING TO CRISES: UJA ALLOCATES FUNDS TO NONPROFITS TO SUPPORT PROGRAMS THAT PROVIDE CRITICAL AID AND SERVICES TO HUNDREDS OF THOUSANDS OF PEOPLE EACH YEAR IN NEW YORK CITY, WESTCHESTER COUNTY, AND LONG ISLAND. THESE NONPROFITS SERVE BOTH JEWS AND THE BROADER NEW YORK COMMUNITY, INCLUDING NEEDY IMMIGRANTS, SENIORS, HOLOCAUST SURVIVORS, SINGLE PARENTS, AND PEOPLE WITH AUTISM AND DISABILITIES. THE SERVICES THEY PROVIDE INCLUDE HOUSING, MEDICAL CARE, END-OF-LIFE AND PALLIATIVE CARE, MENTAL HEALTH COUNSELING, EDUCATION, FOOD PROGRAMS, VOCATIONAL EDUCATION AND GUIDANCE, AND CITIZENSHIP AND ACCULTURATION SKILLS. DURING THE PANDEMIC, UJA PROVIDED ADDITIONAL SUPPORT (CONT. ON SCHEDULE O)BEYOND ITS NORMAL ACTIVITIES, INCLUDING EMERGENCY CASH ASSISTANCE, ADDITIONAL ASSISTANCE TO FOOD PANTRIES, AND ENHANCED MENTAL HEALTH SERVICES AND EMPLOYMENT COUNSELING.UJA ALSO PROMOTES VOLUNTEERISM, FACILITATING THE RECRUITMENT AND TRAINING OF VOLUNTEERS WHO SERVE CLIENTS AT DOZENS OF NONPROFITS. UJA SUPPORTS PROGRAMS IN ISRAEL AND IN NEARLY 70 OTHER COUNTRIES AROUND THE WORLD THAT PROVIDE BASIC HUMAN SERVICES AND ENABLE IMMIGRATION TO ISRAEL BY JEWS LIVING IN AT-RISK COMMUNITIES. IN THE AFTERMATH OF NATURAL DISASTERS IN THE US AND ABROAD, AND TERRORISM AND WARS IN ISRAEL AND ELSEWHERE, UJA, THROUGH ITS NONPROFIT PARTNERS, ASSISTS VICTIMS, PROVIDES TRAUMA RELIEF TO INDIVIDUALS AND COMMUNITIES, AND WORKS TO BUILD RESILIENCE. RESPONDING TO INCREASING ANTI-SEMITISM, UJA HAS DEVELOPED AND FUNDED PROGRAMS TO ENHANCE SECURITY FOR JEWISH INSTITUTIONS IN THE NEW YORK AREA.

4b (Code:) (Expenses $ 93,372,000 including grants of $ 81,948,000) (Revenue $)

DEEPENING JEWISH ENGAGEMENT AND STRENGTHENING JEWISH COMMUNITIES ("JEWISH LIFE"):UJA SUPPORTS INNOVATIVE INITIATIVES THAT ENCOURAGE JEWS OF ALL AGES TO EXPLORE THEIR JEWISH IDENTITY AND PROVIDES FUNDS FOR A RANGE OF PROGRAMS THAT SERVE A DIVERSE JEWISH COMMUNITY. THESE PROGRAMS STRENGTHEN SYNAGOGUES, SUPPORT COLLEGE STUDENTS BY PROMOTING JEWISH LIFE ON CAMPUS, CONNECT YOUNG JEWS TO ISRAEL, AND CREATE A COMMUNITY THAT IS INCLUSIVE AND WELCOMING FOR THE FULL DIVERSITY OF JEWS. AS PART OF ITS COMMITMENT TO EDUCATION AND LIFELONG LEARNING, UJA PROVIDES SUPPORT FOR INFORMAL AND FORMAL JEWISH EDUCATIONAL PROGRAMS FOR BOTH CHILDREN AND ADULTS. UJA ALSO PROVIDES FUNDS FOR SCHOLARSHIPS AND (CONT. ON SCHEDULE O)TEACHER BENEFITS AT JEWISH DAY SCHOOLS AND SCHOLARSHIPS FOR ISRAEL EXPERIENCE PROGRAMS AND JEWISH SUMMER DAY AND OVERNIGHT CAMPS, ALL IMPORTANT PLATFORMS FOR POSITIVE JEWISH EXPERIENCE AND ENGAGEMENT. RECOGNIZING THAT ISRAEL IS FUNDAMENTAL TO THE JEWISH PAST, PRESENT, AND FUTURE, UJA ALSO HELPS JEWS WHO CHOOSE TO IMMIGRATE TO ISRAEL. IN ADDITION, UJA INVESTS IN STRENGTHENING ISRAELI CIVIL SOCIETY TO PROMOTE AN INCLUSIVE, DEMOCRATIC, AND THRIVING JEWISH STATE. IN BOTH ISRAEL AND NEW YORK, UJA SUPPORTS COMMUNITY RELATIONS ORGANIZATIONS THAT PROMOTE EQUALITY AND MUTUAL RESPECT AMONG DIVERSE POPULATIONS AND STRENGTHEN RELATIONSHIPS BETWEEN JEWS AND THE BROADER COMMUNITY, ADVOCATING AROUND ISSUES OF COMMON CAUSE.

4c (Code:) (Expenses $ including grants of $) (Revenue $)

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

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

4e **Total program service expenses** ▶ 211,121,000

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 Rev. Proc. 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	Yes	
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	Yes	
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	Yes	
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	Yes	
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	Yes	
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 the 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		No
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 line 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	Yes	
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	Yes	
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 on 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	497		
b	Enter the number of Forms W-2G included on 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 441			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?		2b	Yes	
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	Yes	
b	If "Yes," enter the name of the foreign country: ▶BD 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	Yes	
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		7b	Yes	
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 0			
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		
9	**Sponsoring organizations maintaining donor advised funds.**				
a	Did the sponsoring organization make any taxable distributions under section 4966?		9a		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		9b		
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
17	**Section 501(c)(21) organizations.** Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953? If "Yes," complete Form 6069.		17		

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	1a	157		
	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.				
b	Enter the number of voting members included in line 1a, above, who are independent	1b	157		
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			No
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			No
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 on 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 on 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 on 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 ▶ FL

18 Section 6104 requires an organization to make its Form 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 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:
▶JOANN LOCASCIO CONTROLLER 130 EAST 59TH STREET NEW YORK, NY 100221302 (212) 836-1730

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 the 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, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) 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 the 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): Individual trustee or director	Institutional Trustee;	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
(1) AMY AB BRESSMAN PRESIDENT/DIRECTOR	0.00	X		X				0	0	0
(2) DAVID L MOORE CHAIR OF THE BOARD/DIRECTOR	0.00	X		X				0	0	0
(3) JEFFREY A KESWIN TREASURER/DIRECTOR	0.00	X		X				0	0	0
(4) JODI J SCHWARTZ GENERAL PLANNING CHAIR/DIRECTOR	0.00	X		X				0	0	0
(5) DAVID A LANDAU PLANNING CHAIR/DIRECTOR	0.00	X		X				0	0	0
(6) NEIL J SANDLER PLANNING CHAIR/DIRECTOR	0.00	X		X				0	0	0
(7) GEULA SOLOMON PLANNING CHAIR/DIRECTOR	0.00	X		X				0	0	0
(8) JANE DRESNER SADAKA GENERAL CAMPAIGN CHAIR/DIRECTOR	0.00	X		X				0	0	0
(9) MARC A UTAY GENERAL CAMPAIGN CHAIR/DIRECTOR	0.00	X		X				0	0	0
(10) KIM HARTMAN CHAIR, UJA WOMEN/DIRECTOR	0.00	X						0	0	0
(11) ISAAC S CHERA CHAIR,PLANNED GIVING & ENDOWNMENTS	0.00	X						0	0	0
(12) JEFFREY A SCHOENFELD CHAIR,ALLOCATIONS STEERING COMMITTEE	0.00	X						0	0	0
(13) LLOYD C BLANKFEIN EXEC. COMM. AT LARGE/DIRECTOR	0.00	X						0	0	0
(14) SCOTT JAFFEE EXEC. COMM. AT LARGE/DIRECTOR	0.00	X						0	0	0
(15) ERIC S SCHWARTZ EXEC. COMM. AT LARGE/DIRECTOR	0.00	X						0	0	0
(16) TARA SLONE-GOLDSTEIN EXEC. COMM. AT LARGE/DIRECTOR	0.00	X						0	0	0
(17) MERRYL H TISCH EXEC. COMM. AT LARGE/DIRECTOR	0.00	X						0	0	0

(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) Individual trustee or director	Institutional trustee	Officer	Key employee	Former	Highest compensated employee	(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
200 DUST COHEN	0.00							0	0	0
SPECIAL ADVISOR TO THE PRESIDENT	0.00							0	0	0
201 MEG ADDISON	0.00							0	0	0
202 NICOLE AGUS	0.00							0	0	0
203 MICHEL ADN	0.00							0	0	0
204 JEFFREY H ABORSON	0.00							0	0	0
205 STACI BARKER	0.00							0	0	0
206 PAMELA BARNETT	0.00							0	0	0
207 MICHAEL R BARON	0.00							0	0	0
208 MATTY B BARTH	0.00							0	0	0
209 HEAVEN SUVAL BECKSHAW	0.00							0	0	0
210 GAYLE BERG	0.00							0	0	0
211 DONALD BERNSTEIN	0.00							0	0	0
212 MARK JONATHAN E BLAKE	0.00							0	0	0
213 LLOYD C BLANKFEIN	0.00							0	0	0
214 DANIEL B BLASER	0.00							0	0	0
215 JAY D BLITZER	0.00							0	0	0
216 LILY BRODSKY	0.00							0	0	0
217 DANIEL T BURSKY	0.00							0	0	0
218 PAUL CABLON	0.00							0	0	0
219 JAY D CHAZANOFF	0.00							0	0	0
220 GAL COHEN	0.00							0	0	0
221 JAMES/ROBERT J COHEN	0.00							0	0	0
222 MATTHEW COHEN	0.00							0	0	0
223 MARK ELLIOT J COSGROVE	0.00							0	0	0
224 MARK JOSHUA M DAVIDSON	0.00							0	0	0
225 CAMILLE DUNOT	0.00							0	0	0
226 CARLA B EDELSON	0.00							0	0	0
227 JONATHAN M EISTNECH	0.00							0	0	0
228 MARK STEVEN A EILER	0.00							0	0	0
229 DAVID EMME	0.00							0	0	0
230 JEFREZ FESI	0.00							0	0	0
231 DAN FIT	0.00							0	0	0
232 BENJAMIN FONELSTEIN	0.00							0	0	0
233 BRUCE S FRASER	0.00							0	0	0
234 LAUREN FOEL	0.00							0	0	0
235 STEVEN J FREDMAN	0.00							0	0	0
236 CHRIS FREEDMAN	0.00							0	0	0
237 KARI FREEDMAN	0.00							0	0	0
238 ZION BARNES FREEDMAN	0.00							0	0	0
239 TAN GAUMAN	0.00							0	0	0
240 MARC GARY	0.00							0	0	0
241 MICHAEL S GELLER	0.00							0	0	0
242 CARIN COSTEN GERSZBERG	0.00							0	0	0
243 MICHAEL S GLASS	0.00							0	0	0
244 JACKSON GOLDBERG	0.00							0	0	0
245 PETER C GOLLMAN	0.00							0	0	0
246 MARC A GOLDSTEIN	0.00							0	0	0
247 MO GOODMAN	0.00							0	0	0
248 ALYSSA GREENBERG	0.00							0	0	0
249 LAURA B GREENFIELD	0.00							0	0	0
250 GLANTS MADHO	0.00							0	0	0
251 DAVID A HARRIS	0.00							0	0	0
252 SCOTT HARRIS	0.00							0	0	0
253 SUSAN A HELD	0.00							0	0	0
254 STACY EDWIGHN HELYSTON	0.00							0	0	0
255 SCOTT JAFFEE	0.00							0	0	0
256 TRICIA WALLETT	0.00							0	0	0
257 JAY A KAGNER	0.00							0	0	0
258 DAVID A KATZ	0.00							0	0	0
259 RICHARD L KAY	0.00							0	0	0
260 PATRICIA KENNER	0.00							0	0	0
261 MICHAEL A KESSLER	0.00							0	0	0
262 STEVEN KHAGHAI	0.00							0	0	0
263 J TIMMA KONGSLEY	0.00							0	0	0
264 ANDREW D KLABER	0.00							0	0	0
265 BRETT S KLEIN	0.00							0	0	0
266 ALEXANDRE KLEINBERG	0.00							0	0	0
267 ALICE A KORNH	0.00							0	0	0
268 LISA KOPPA LLAMA	0.00							0	0	0
269 JOSEPH KOSLIN	0.00							0	0	0
270 DOUGLAS R KORN	0.00							0	0	0
271 ALEXANDRA KOSOLIN	0.00							0	0	0
272 ALBERT LANGZ	0.00							0	0	0
273 WALAMOT LEGANT	0.00							0	0	0
274 MARK L LICHTER	0.00							0	0	0
275 HAGAGAH LIEBERMAN	0.00							0	0	0
276 GREENBAUM	0.00							0	0	0
277 MARK LOVELL	0.00							0	0	0
278 MARC MAGNER	0.00							0	0	0
279 ANDREW EDGES MAGPHAN	0.00							0	0	0
280 ALEXEPTEL MANN	0.00							0	0	0
281 DALTON MARCELLI	0.00							0	0	0
282 CINDY MASTERS	0.00							0	0	0
283 AARON MENDELSON	0.00							0	0	0
284 WILLIAM MILLER	0.00							0	0	0
285 FRAL MILLMAN	0.00							0	0	0
286 ALAN A MINCHAN	0.00							0	0	0
287 JENNIFER B WEISS MONDAY	0.00							0	0	0
288 JONATHAN MORAZZENTAN	0.00							0	0	0
289 JOSHUA J NASH	0.00							0	0	0
290 CHARLES M NATMAN	0.00							0	0	0
291 BARRY NEES	0.00							0	0	0
292 WARREN S NEWCOMB	0.00							0	0	0
293 ELIOT M NEWHOUSE	0.00							0	0	0
294 NICOLE NOVICK	0.00							0	0	0
295 GLORINE Z PICK	0.00							0	0	0
296 LIRAN PLATTUS	0.00							0	0	0
297 JOSEPH RAFALOWICZ	0.00							0	0	0
298 JONATHAN RAGHAVACHI	0.00							0	0	0
299 DAVID L REDNICK	0.00							0	0	0
300 GEORGIAN REISENBERG	0.00							0	0	0
301 DAVIS ELANA RITTER	0.00							0	0	0
302 MARK DANIEL S ROBINSON	0.00							0	0	0
303 RICHARD A ROSEN	0.00							0	0	0
304 DAVID D ROTHMAN	0.00							0	0	0
305 AMY RUBIN	0.00							0	0	0
306 JACOB M SAFRA	0.00							0	0	0
307 BARBARA D SALMANSON	0.00							0	0	0
308 SUSAN SAPPER	0.00							0	0	0
309 EDWARD SASSOWER	0.00							0	0	0
310 DAVID S SHAMIE	0.00							0	0	0
311 SAMEAR F SHAMUS	0.00							0	0	0
312 SHIMON SHKURY	0.00							0	0	0
313 DAVID SILVERS	0.00							0	0	0
314 PATRICIA SILVERS	0.00							0	0	0
315 MARK GERALD C SKULNIK	0.00							0	0	0
316 JILL SMITH	0.00							0	0	0
317 SUZANNE STAELER	0.00							0	0	0
318 TRACY A STEIN	0.00							0	0	0
319 JEFFREY M STEIN	0.00							0	0	0
320 MICHAEL L STEIN	0.00							0	0	0
321 RACHEL B STEIN	0.00							0	0	0
322 RAJIV SUNWICHA	0.00							0	0	0
323 DOROTHY TANNENBUM	0.00							0	0	0
324 KARIN RACHEL TIMONER	0.00							0	0	0
325 JOHN UDDAN	0.00							0	0	0
326 VERA ROSENBERG VIRHOFF	0.00							0	0	0
327 MICHAEL VICKAPES	0.00							0	0	0
328 TERI VOLPERT	0.00							0	0	0
329 DANIEL S WAGMAN	0.00							0	0	0
330 JAMES WARNER	0.00							0	0	0
331 DAVID WASSERMAN	0.00							0	0	0
332 DEBRA WASSERMAN	0.00							0	0	0
333 PETER WEBB	0.00							0	0	0
334 BETH WEINGARTEN	0.00							0	0	0
335 AVERY WEISSENBERG	0.00							0	0	0
336 EDITH WEST	0.00							0	0	0
337 BRUCE WEXLER	0.00							0	0	0
338 CYNTHIA D WILKIT	0.00							0	0	0
339 LYNNE WOLITZER	0.00							0	0	0
340 NANCY ZIMO	0.00							0	0	0
341 HIKARI ZELTER	0.00							0	0	0
342 MARK A CHOTIN ZEPANCSIUN	0.00							0	0	0
343 RABBI BRIAN ZIPLOWITZ	0.00							0	0	0
344 RACHEL D SOLOSTEIN	0.00		X					622,024	0	57,861
345 JAVIN MUDDENTAL TEMPLELLI	0.00							0	0	0
346 FINANCIAL OFFICER	0.00		X					557,960	0	105,091
347 ELLEN A GOLDMAN	0.00		X					401,218	0	39,010
SECRETARY/CORPL COUNSEL & CCO	0.00		X					962,900	0	225,179
349 MARK MEGON	0.00		X					882,512	0	29,756
EXEC. VICE PRESIDENT - PRO	0.00		X					0	0	0
351 JEANNA COHEN	0.00		X					374,750	0	58,100
352 INVESTMENT OFFICER	0.00		X					367,798	0	64,308
353 LAVANNY CARMAN	0.00		X					329,901	0	1,350
354 MARKETING OFFICER	0.00		X					151,979	0	622
355 DEBORAH EDELSON	0.00		X					354,725	0	7,743
356 PLANNING OFFICER	0.00		X					393,536	0	53,521
357 MARTIN LARSON	0.00		X					314,695	0	69,484
358 VICE PRESIDENT, REGIONS	0.00		X					307,208	0	61,509
359 WILLIAM SARRIER	0.00		X					293,951	0	9,053
360 PLANNED GIVING & ENDOWMENTS	0.00		X					0	0	0
361 CHARLOTTE WEINSTEIN	0.00		X					293,951	0	9,053
362 VICE PRESIDENT, ATTORNEY	0.00		X					0	0	0
363 J. LAWRENCE HIRSCH 12/2022	0.00		X					1,408,070	0	263,384

Sub-Total . . . . . ▶ 0
d Total from continuation sheets to Part VII, Section A . . . ▶ 0
e Total (add lines 1b and 1c) . . . . . ▶ 1,408,070 0 263,384

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 ▶ 14

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 . . . . . Yes: X 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 . . . . . Yes: X No:

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 . . . . . Yes: X 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
CONSOLI CONSTRUCTION CO INC	CONSTRUCTION	11,343,702
72 SUMMER STREET STAMFORD, CT 06901		
SDL CONSTRUCTION CO INC	CONSTRUCTION	1,796,493
271 SKIP LANE EAST SAVIN, NY 11709		
JOHNSTORR & ASSOCIATES ARCHITECT PC	ARCHITECT	917,911
207 WEST 25TH STREET NEW YORK, NY 10001		
INTERNATIONAL SECURITY ASSOCIATES INC	SECURITY	897,623
350 FIFTH AVENUE NEW YORK, NY 10001		
FERRENDIZ DUET KOSHER CATERERS INC	EVENT CATERING/SUBCONT. WORKERS/EEO	813,737
55 ANDERSON AVENUE CLIFFSIDE PARK, NJ 07010		

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 ▶ 0

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 OtherAmt Similar Amounts	1a Federated campaigns . .	1a			
	b Membership dues . .	1b			
	c Fundraising events . .	1c	35,672,000		
	d Related organizations	1d	25,475,000		
	e Government grants (contributions)	1e			
	f All other contributions, gifts, grants, and similar amounts not included above	1f	148,068,000		
	g Noncash contributions included in lines 1a - 1f:$	1g	5,365,000		
	h **Total.** Add lines 1a-1f . . . . . ▶		209,215,000		

Program Service Revenue

	Business Code				
2a TRUST FOR DISAB ADULTS	900099	702,000	702,000		
b PUBLIC POLICY SERVICES	900099	1,000	1,000		
c					
d					
e					
f All other program service revenue.		454,000	454,000		
g **Total.** Add lines 2a–2f. . . . . ▶	1,157,000				

Other Revenue

3 Investment income (including dividends, interest, and other similar amounts)		12,781,000	10,246,000	2,535,000	
4 Income from investment of tax-exempt bond proceeds ▶					
5 Royalties . . . . . ▶					

		(i) Real	(ii) Personal				
6a Gross rents	6a	139,000					
b Less: rental expenses	6b	0					
c Rental income or (loss)	6c	139,000					
d Net rental income or (loss) . . . . . ▶				139,000			139,000

		(i) Securities	(ii) Other				
7a Gross amount from sales of assets other than inventory	7a	597,235,000					
b Less: cost or other basis and sales expenses	7b	553,094,000					
c Gain or (loss)	7c	44,141,000					
d Net gain or (loss) . . . . . ▶				44,141,000	44,141,000		

8a Gross income from fundraising events (not including $ 35,672,000 of contributions reported on line 1c). See Part IV, line 18	8a	4,173,000				
b Less: direct expenses	8b	9,710,000				
c Net income or (loss) from fundraising events . . ▶			-5,537,000			-5,537,000
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 . . ▶						

	Business Code				
11a PENSION PLAN ADMIN FEE	561000	41,000	41,000		
b					
c					
d All other revenue		247,000	247,000		
e **Total.** Add lines 11a–11d . . . . . ▶		288,000			
12 **Total revenue.** See instructions . . . . ▶		262,184,000	55,832,000	2,535,000	-5,398,000

OtherRevenueMiscAmt

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	183,483,000	183,483,000		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	1,807,000	1,807,000		
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	5,413,000	1,390,000	2,512,000	1,511,000
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	38,497,000	8,181,000	12,072,000	18,244,000
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	2,511,000	515,000	792,000	1,204,000
9 Other employee benefits	8,232,000	1,853,000	2,669,000	3,710,000
10 Payroll taxes	2,833,000	598,000	905,000	1,330,000
11 Fees for services (non-employees):				
a Management				
b Legal	323,000	164,000	135,000	24,000
c Accounting	490,000		490,000	
d Lobbying	160,000	160,000		
e Professional fundraising services. See Part IV, line 17	245,000			245,000
f Investment management fees	411,000		411,000	
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	3,582,000	2,164,000	913,000	505,000
12 Advertising and promotion	1,432,000	371,000	346,000	715,000
13 Office expenses	2,460,000	534,000	314,000	1,612,000
14 Information technology	1,718,000	164,000	1,138,000	416,000
15 Royalties				
16 Occupancy	3,731,000	672,000	1,028,000	2,031,000
17 Travel	1,382,000	973,000	171,000	238,000
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	79,000	48,000	12,000	19,000
20 Interest	2,197,000	1,505,000	460,000	232,000
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	6,114,000	3,742,000	972,000	1,400,000
23 Insurance	644,000		644,000	
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 SCHOLARSHIPS AND TUITIO	1,574,000	1,554,000	14,000	6,000
b INS ON BEHALF OF AGENCI	600,000	600,000		
c CREDIT CARD FEES	539,000		5,000	534,000
d TEMPORARY PERSONNEL	397,000	9,000	114,000	274,000
e All other expenses	1,306,000	634,000	212,000	460,000
25 **Total functional expenses.** Add lines 1 through 24e	272,160,000	211,121,000	26,329,000	34,710,000
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		34,564,000	1	26,304,000
	2	Savings and temporary cash investments		96,181,000	2	45,993,000
	3	Pledges and grants receivable, net		98,985,000	3	102,528,000
	4	Accounts receivable, net		14,285,000	4	12,799,000
	5	Loans and other receivables from 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			7	
	8	Inventories for sale or use			8	
	9	Prepaid expenses and deferred charges		1,996,000	9	2,717,000
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 82,416,000			
	b	Less: accumulated depreciation	10b 34,894,000	49,262,000	10c	47,522,000
	11	Investments—publicly traded securities		462,412,000	11	80,801,000
	12	Investments—other securities. See Part IV, line 11		678,323,000	12	1,145,614,000
	13	Investments—program-related. See Part IV, line 11		26,758,000	13	33,840,000
	14	Intangible assets			14	
	15	Other assets. See Part IV, line 11		145,165,000	15	109,911,000
	16	**Total assets.** Add lines 1 through 15 (must equal line 33)		1,607,931,000	16	1,608,029,000
Liabilities	17	Accounts payable and accrued expenses		26,674,000	17	28,440,000
	18	Grants payable		25,440,000	18	25,644,000
	19	Deferred revenue			19	
	20	Tax-exempt bond liabilities		11,651,000	20	8,588,000
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		52,269,000	21	3,351,000
	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			24	
	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		99,107,000	25	95,266,000
	26	**Total liabilities.** Add lines 17 through 25		215,141,000	26	161,289,000
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		581,534,000	27	634,826,000
	28	Net assets with donor restrictions		811,256,000	28	811,914,000
		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		1,392,790,000	32	1,446,740,000
	33	Total liabilities and net assets/fund balances		1,607,931,000	33	1,608,029,000

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	262,184,000
2	Total expenses (must equal Part IX, column (A), line 25)	2	272,160,000
3	Revenue less expenses. Subtract line 2 from line 1	3	-9,976,000
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	1,392,790,000
5	Net unrealized gains (losses) on investments	5	37,600,000
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	26,326,000
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column	10	1,446,740,000

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 on 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 Uniform Guidance, 2 C.F.R. Part 200, Subpart F?	3a		No
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		

Additional Data

Return to Form

Software ID:

Software Version:

Form 990, Special Condition Description:

Special Condition Description

SCHEDULE A
(Form 990)

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

2022

Open to Public Inspection

Name of the organization
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

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).)

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 on 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?		**(v)** Amount of monetary support (see instructions)	**(vi)** Amount of other support (see instructions)
			Yes	**No**		
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) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . .	184,455,000	192,741,000	224,911,000	234,500,000	209,215,000	1,045,822,000
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	184,455,000	192,741,000	224,911,000	234,500,000	209,215,000	1,045,822,000
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) . .						10,129,840
6 **Public support.** Subtract line 5 from line 4.						1,035,692,160

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4. .	184,455,000	192,741,000	224,911,000	234,500,000	209,215,000	1,045,822,000
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . .	20,105,000	7,229,000	18,431,000	1,023,000	10,246,000	57,034,000
9 Net income from unrelated business activities, whether or not the business is regularly carried on. .	-5,418,000	2,034,000	2,082,000	2,649,000	2,535,000	3,882,000
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.). .	369,000	389,000	373,000	422,000	288,000	1,841,000
11 **Total support.** Add lines 7 through 10						1,108,579,000

12 Gross receipts from related activities, etc. (see instructions) **12** 19,405,000

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 2022 (line 6, column (f) divided by line 11, column (f)) . . . . . **14** 93.430 %

15 Public support percentage for 2020 Schedule A, Part II, line 14 . . . . . **15** 93.420 %

16a **33 1/3% support test—2022.** 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—2021.** 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—2022.** 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—2021.** 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) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(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) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(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 on 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 2022 (line 8, column (f) divided by line 13, column (f))	15
16	Public support percentage from 2021 Schedule A, Part III, line 15	16

Section D. Computation of Investment Income Percentage

17	Investment income percentage for **2022** (line 10c, column (f) divided by line 13, column (f))	17
18	Investment income percentage from **2021** Schedule A, Part III, line 17	18

19a **33 1/3% support tests-2022.** 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—2021.** 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) .*	7		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? *If "Yes," complete Part I of Schedule L (Form 990).*	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 on 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 on 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 on lines 11b and 11c below, the governing body of a supported organization?	**11a**		
b	A family member of a person described on 11a above?	**11b**		
c	A 35% controlled entity of a person described on 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 on line 2a, above 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 2022 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-2022**	**(iii) Distributable Amount for 2022**
1 Distributable amount for 2022 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2022 (reasonable cause required-- *explain in* ***Part VI***). See instructions.			
3 Excess distributions carryover, if any, to 2022:			
a From 2017.			
b From 2018.			
c From 2019.			
d From 2020.			
e From 2021.			
f **Total** of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2022 distributable amount			
i Carryover from 2017 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2022 from Section D, line 7: $			
a Applied to underdistributions of prior years			
b Applied to 2022 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2022, 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 2022. 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 2023.** Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2018.			
b Excess from 2019.			
c Excess from 2020.			
d Excess from 2021.			
e Excess from 2022.			

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:	MISCELLANEOUS INCOME

Additional Data

Return to Form

Software ID:

Software Version:

Schedule B

(Form 990)
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

2022

Name of the organization	**Employer identification number**
UNITED JEWISH APPEAL-FEDERATION OF JEWISH PHILANTHROPIES OF NEW YORK INC	51-0172429

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
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

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
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

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	Employer identification number
UNITED JEWISH APPEAL-FEDERATION OF JEWISH PHILANTHROPIES OF NEW YORK INC	51-0172429

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)

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

2022

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
UNITED JEWISH APPEAL-FEDERATION OF JEWISH PHILANTHROPIES OF NEW YORK INC	51-0172429

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)	0	
b Total lobbying expenditures to influence a legislative body (direct lobbying)	160,000	
c Total lobbying expenditures (add lines 1a and 1b)	160,000	
d Other exempt purpose expenditures	272,000,000	
e Total exempt purpose expenditures (add lines 1c and 1d)	272,160,000	
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.	1,000,000	
g Grassroots nontaxable amount (enter 25% of line 1f)	250,000	
h Subtract line 1g from line 1a. If zero or less, enter -0-.	0	
i Subtract line 1f from line 1c. If zero or less, enter -0-.	0	

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.

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)** 2018	**(b)** 2019	**(c)** 2020	**(d)** 2021	**(e)** Total
2a Lobbying nontaxable amount	1,000,000	1,000,000	1,000,000	1,000,000	4,000,000
b Lobbying ceiling amount (150% of line 2a, column(e))					6,000,000
c Total lobbying expenditures	197,000	169,000	187,000	160,000	713,000
d Grassroots nontaxable amount	250,000	250,000	250,000	250,000	1,000,000
e Grassroots ceiling amount (150% of line 2d, column (e))					1,500,000
f Grassroots lobbying expenditures	1,000	1,000	1,000		3,000

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?			
b	Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?			
c	Media advertisements?			
d	Mailings to members, legislators, or the public?			
e	Publications, or published or broadcast statements?			
f	Grants to other organizations for lobbying purposes?			
g	Direct contact with legislators, their staffs, government officials, or a legislative body?			
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?			
i	Other activities?			
j	Total. Add lines 1c through 1i			
2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?			
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

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

2022

Open to Public Inspection

Name of the organization
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

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		19
2	Aggregate value of contributions to (during year)		197,000
3	Aggregate value of grants from (during year)		842,000
4	Aggregate value at end of year		22,386,000

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	1,049,635,000	1,171,282,000	922,018,000	963,386,000	979,826,000
b Contributions	11,448,000	27,810,000	41,659,000	31,247,000	33,797,000
c Net investment earnings, gains, and losses	75,539,000	-109,087,000	270,061,000	-2,256,000	19,042,000
d Grants or scholarships	-39,024,000	-36,628,000	-58,835,000	-57,329,000	-56,984,000
e Other expenditures for facilities and programs	-1,951,000	-1,317,000	-1,199,000	-10,218,000	-9,437,000
f Administrative expenses	-2,390,000	-2,425,000	-2,422,000	-2,812,000	-2,858,000
g End of year balance	1,093,257,000	1,049,635,000	1,171,282,000	922,018,000	963,386,000

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

- **a** Board designated or quasi-endowment ▶ 38.000 %
- **b** Permanent endowment ▶ 28.000 %
- **c** Term endowment ▶ 34.000 %

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

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		1,118,000		1,118,000
b Buildings		74,725,000	31,480,000	43,245,000
c Leasehold improvements				
d Equipment		6,573,000	3,414,000	3,159,000
e Other				
Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, column (B), line 10(c).)* ▶				47,522,000

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) INVESTMENT IN NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND,LLC (SEE SCH. O)	1,089,419,000	F
(B) PRIVATE EQUITY/REAL-ESTATE	2,980,000	F
(C) INTEREST IN RELATED ORGANIZATIONS	48,728,000	C
(D) NON-PUBLIC EQUITIES	34,000	F
(E) STATE OF ISRAEL BONDS	4,453,000	C
(E)		
(F)		
(G)		
(H)		
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 12.)* ▶	1,145,614,000	

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
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
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)AMOUNTS HELD ON BEHALF OF OTHER AGENCIES	3,351,000
(2)OTHER PROPERTY	70,454,000
(3)ASSETS HELD UNDER CHARITABLE TRUST AGREEMENTS	24,437,000
(4)CASH SURRENDER VALUE - LIFE INSURANCE	5,253,000
(5)RIGHT-OF-USE ASSET - OPERATING LEASES	3,033,000
(6)INTERCOMPANY RECEIVABLE (PAYABLE)	2,113,000
(7)OTHER	1,270,000
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col.(B) line 15.)* ▶	109,911,000

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.)* ▶	95,266,000

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	323,050,000
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:				
a	Net unrealized gains (losses) on investments	2a	37,600,000		
b	Donated services and use of facilities	2b	150,000		
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d	26,187,000		
e	Add lines **2a** through **2d**			2e	63,937,000
3	Subtract line **2e** from line **1**			3	259,113,000
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	3,071,000		
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	3,071,000
5	Total revenue. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 12.)			5	262,184,000

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	269,239,000
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:				
a	Donated services and use of facilities	2a	150,000		
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	150,000
3	Subtract line **2e** from line **1**			3	269,089,000
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	3,071,000		
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	3,071,000
5	Total expenses. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 18.)			5	272,160,000

Part XIII

Supplemental Information

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, 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:	CERTAIN NETWORK AGENCIES INVEST IN THE UJA POOLED INVESTMENT ACCOUNT.
PART V, LINE 4:	INTENDED USES OF ENDOWMENT FUNDS: THE ORGANIZATION'S OPERATING BUDGET IS BASED UPON A TOTAL "SOURCES & USES" OF FUNDS CONCEPT. SOURCES OF FUNDING ARE IDENTIFIED DURING THE OPERATING BUDGET PROCESS TO COVER PLANNED EXPENDITURES. OTHER THAN THE ANNUAL CAMPAIGN, THE ENDOWMENT IS THE NEXT SINGLE HIGHEST SOURCE OF FUNDING FOR BUDGETARY NEEDS.
PART X, LINE 2:	FIN 48: THE ORGANIZATION FOLLOWS THE PROVISIONS OF ACCOUNTING STANDARDS CODIFICATION (ASC) SUBTOPIC 740-10, INCOME TAXES - OVERALL (ASC 740-10), RELATING TO UNCERTAINTY IN INCOME TAXES. FOR THE ORGANIZATION, ASC 740-10 IS PRIMARILY APPLICABLE TO THE INCURRENCE OF UNRELATED BUSINESS INCOME TAX ATTRIBUTABLE TO CERTAIN OF ITS INVESTMENTS. ASC 740-10 ESTABLISHES A MINIMUM THRESHOLD FOR FINANCIAL STATEMENT RECOGNITION OF THE BENEFITS OF POSITIONS TAKEN, OR EXPECTED TO BE TAKEN, IN FILING TAX RETURNS. IT REQUIRES THE EVALUATION OF TAX POSITIONS TAKEN OR EXPECTED TO BE TAKEN IN THE COURSE OF PREPARING THE ORGANIZATION'S INCOME TAX RETURNS TO DETERMINE WHETHER THE TAX POSITIONS ARE "MORE-LIKELY-THAN-NOT" OF BEING SUSTAINED BY THE APPLICABLE TAX AUTHORITY. TAX POSITIONS NOT DEEMED TO MEET THE "MORE-LIKELY-THAN-NOT" THRESHOLD ARE RECORDED AS A TAX EXPENSE. THERE ARE NO TAX POSITIONS NOT DEEMED TO MEET THE "MORE-LIKELY THAN-NOT" THRESHOLD.
PART XI, LINE 2D - OTHER ADJUSTMENTS:	IMPUTED RENTAL INCOME 26,187,000.
PART I, LINES 5 AND 6:	THE ORGANIZATION DOES NOT MAINTAIN DONOR ADVISED FUNDS. HOWEVER, IT DOES MAINTAIN CERTAIN FUNDS WITH AND WITHOUT DONOR RESTRICTIONS ("SIMILAR FUNDS") THAT ARE OVERSEEN BY SPECIAL COMMITTEES. UJA APPOINTS A MAJORITY OF THE MEMBERS THAT SERVE ON EACH OF THESE SPECIAL COMMITTEES; OTHER MEMBERS MAY BE SELECTED BY THE DONOR OR THE DONOR'S FAMILY.

Additional Data

Return to Form

Software ID:

Software Version:

SCHEDULE F (Form 990)

Department of the Treasury
Internal Revenue Service

Statement of Activities Outside the United States

▶ **Complete if the organization answered "Yes" to Form 990, Part IV, line 14b, 15, or 16.**

▶ **Attach to Form 990.**

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

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

Part I **General Information on Activities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

1 **For grantmakers.** Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . . ☑ **Yes** ☐ **No**

2 **For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.

3 Activites per Region. (The following Part I, line 3 table can be duplicated if additional space is needed.)

(a) Region	**(b)** Number of offices in the region	**(c)** Number of employees, agents, and independent contractors in the region	**(d)** Activities conducted in region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region)	**(e)** If activity listed in (d) is a program service, describe specific type of service(s) in the region	**(f)** Total expenditures for and investments in the region
(1) NORTH AMERICA		1	PROGRAM SERVICES	INSURANCE SERVICES FOR NETWORK AGENCIES	14,791,000
(2) MIDDLE EAST	1	11	PROGRAM SERVICES	MONITORING OF GRANTS - REFER TO SCHEDULE F, PART V, SUPPLEMENTAL INFORMATION	1,898,000
(3) MIDDLE EAST			PROGRAM-RELATED INVESTMENTS	LOANS AND OTHER SUPPORT FOR INVESTMENT IN SOCIAL IMPACT FUNDS	275,000
(4) CARIBBEAN			INVESTMENTS		34,000
(5)					
(6)					
(7)					
(8)					
(9)					
(10)					
(11)					
(12)					
(13)					
(14)					
(15)					
(16)					
(17)					
3a Sub-total	1	12			16,998,000
b Total from continuation sheets to Part I . . .	0	0			0
c Totals (add lines 3a and 3b)	1	12			16,998,000

Part II **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than $5,000. Part II can be duplicated if additional space is needed.

1 **(a)** Name of organization	**(b)** IRS code section and EIN (if applicable)	**(c)** Region	**(d)** Purpose of grant	**(e)** Amount of cash grant	**(f)** Manner of cash disbursement	**(g)** Amount of noncash assistance	**(h)** Description of noncash assistance	**(i)** Method of valuation (book, FMV, appraisal, other)
(1)								
(2)								
(3)								
(4)								
(5)								
(6)								
(7)								
(8)								
(9)								
(10)								
(11)								
(12)								
(13)								
(14)								
(15)								
(16)								

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter . . . . . ▶ _____

3 Enter total number of other organizations or entities . . . . . ▶

Part III **Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 16. Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	**(b)** Region	**(c)** Number of recipients	**(d)** Amount of cash grant	**(e)** Manner of cash disbursement	**(f)** Amount of noncash assistance	**(g)** Description of noncash assistance	**(h)** Method of valuation (book, FMV, appraisal, other)
(1)							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							
(13)							
(14)							
(15)							
(16)							
(17)							
(18)							

Part IV Foreign Forms

1 Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)* . . . . . ☑ Yes ☐ No

2 Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organization may be required to separately file Form 3520, Annual Return to Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A; don't file with Form 990)* . . . . . ☐ Yes ☑ No

3 Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons with Respect to Certain Foreign Corporations. (see Instructions for Form 5471)* . . . . . ☑ Yes ☐ No

4 Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund. (see Instructions for Form 8621)* . ☑ Yes ☐ No

5 Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons with Respect to Certain Foreign Partnerships (see Instructions for Form 8865)* . . . . . ☑ Yes ☐ No

6 Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see Instructions for Form 5713; don't file with Form 990).* . . . . . ☐ Yes ☑ No

Part V **Supplemental Information**

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

ReturnReference	Explanation
PART I, LINE 2:	PROCEDURES FOR MONITORING THE USE OF FOREIGN GRANT FUNDS: FUNDS FOR OVERSEAS PROGRAM ACTIVITIES ARE DISTRIBUTED THROUGH THE JEWISH FEDERATIONS OF NORTH AMERICA (JFNA) PRIMARILY TO THE JEWISH AGENCY FOR ISRAEL (JAFI) AND THE AMERICAN JEWISH JOINT DISTRIBUTION COMMITTEE, INC. (JDC). OVERSEAS ORGANIZATIONS RECEIVING FUNDS FROM JFNA AND JDC UTILIZE SUCH FUNDS FOR ACTIVITIES AND PROGRAMS THAT SUPPORT UJA'S CHARITABLE PURPOSES. UJA'S ISRAEL OFFICE, IN CONJUNCTION WITH STAFF IN NEW YORK, REVIEW TWO ANNUAL REPORTS (A MID-YEAR AND A FINAL REPORT) FOR TARGETED GRANT PROGRAMS THAT ARE LOCATED IN ISRAEL AND OTHER FOREIGN LOCATIONS AND FOR WHICH FUNDS ARE DISTRIBUTED THROUGH JFNA. THE REPORTS INCLUDE NARRATIVE, STATISTICAL, AND FINANCIAL COMPONENTS AND SERVE TO ENSURE THAT PROGRAMMATIC OBJECTIVES ARE APPROPRIATELY ATTAINED, AND THAT EXPENDITURES QUALIFY FOR REIMBURSEMENT UNDER THE GRANT. IN ISRAEL, UJA GRANTEE ORGANIZATIONS ARE LEGALLY REGISTERED WITH JAFI, WHICH RELEASES REGULAR GRANT PAYMENTS BASED ON COORDINATION WITH THE UJA'S ISRAEL OFFICE.
PART III ACCOUNTING METHOD:	

Additional Data

Software ID:

Software Version:

SCHEDULE G (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a.

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

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

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

Part I **Fundraising Activities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- **a** ☑ Mail solicitations
- **b** ☑ Internet and email solicitations
- **c** ☑ Phone solicitations
- **d** ☑ In-person solicitations
- **e** ☑ Solicitation of non-government grants
- **f** ☐ Solicitation of government grants
- **g** ☑ Special fundraising events

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☑ **Yes** ☐ **No**

b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	**(ii)** Activity	**(iii)** Did fundraiser have custody or control of contributions? Yes	No	**(iv)** Gross receipts from activity	**(v)** Amount paid to (or retained by) fundraiser listed in col. **(i)**	**(vi)** Amount paid to (or retained by) organization
1 JRB CONSULTING SERVICESLLC 215 W 88TH ST NY, NY 10024	SOLICITATION OF DONORS (SEE PART IV)		No	3,415,000	165,000	3,250,000
2 PAUL KANE 3 STONE DRIVE WESTPORT, CT 06880	SOLICITATION OF DONORS (SEE PART IV)		No	171,000	80,000	91,000
3						
4						
5						
6						
7						
8						
9						
10						
Total . . . . . ▶				3,586,000	245,000	3,341,000

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

NY, NJ, PA, FL, CT

Part II **Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than $15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than $5,000.

		(a) Event #1 WALL STREET DINNER (event type)	(b) Event #2 LAWYERS ANNUAL EVENT (event type)	(c) Other events 75 (total number)	(d) Total events (add col. (a) through col. (c))
Revenue	1 Gross receipts	6,455,000	3,085,000	28,547,000	38,087,000
	2 Less: Contributions	6,249,000	3,001,000	26,392,000	35,642,000
	3 Gross income (line 1 minus line 2)	206,000	84,000	2,155,000	2,445,000
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs	4,000		424,000	428,000
	7 Food and beverages	693,000	204,000	3,449,000	4,346,000
	8 Entertainment			534,000	534,000
	9 Other direct expenses	233,000	45,000	1,765,000	2,043,000
	10 Direct expense summary. Add lines 4 through 9 in column (d) ▶				7,351,000
	11 Net income summary. Subtract line 10 from line 3, column (d) ▶				-4,906,000

Part III **Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than $15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col.(a) through col.(c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes ____ % ☐ No	☐ Yes ____ % ☐ No	☐ Yes ____ % ☐ No	
	7 Direct expense summary. Add lines 2 through 5 in column (d) ▶				
	8 Net gaming income summary. Subtract line 7 from line 1, column (d) ▶				

9 Enter the state(s) in which the organization conducts gaming activities: _____

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: _____

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: _____

11 Does the organization conduct gaming activities with nonmembers? . . . . . ☐ **Yes** ☐ **No**

12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? . . . . . ☐ **Yes** ☐ **No**

13 Indicate the percentage of gaming activity conducted in:

a	The organization's facility	**13a**	%
b	An outside facility	**13b**	%

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶

Address ▶

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? . . . . . ☐ **Yes** ☐ **No**

b If "Yes," enter the amount of gaming revenue received by the organization ▶ $ _____ and the amount of gaming revenue retained by the third party ▶ $ _____.

c If "Yes," enter name and address of the third party:

Name ▶

Address ▶

16 Gaming manager information:

Name ▶

Gaming manager compensation ▶ $

Description of services provided ▶

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? . . . . . ☐ Yes ☐ No

b Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ $

Part IV **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

Return Reference	Explanation
SCHEDULE G, PART I, LINE 2B, COLUMN (V)	AMOUNTS PAID TO THE PROFESSIONAL FUNDRAISERS PAUL KANE AND JRB CONSULTING SERVICES LLC LISTED ON PART I, LINE 2 (B) ARE BASED UPON FIXED FEE CONTRACTUAL ARRANGEMENTS.

Additional Data

Return to Form

Software ID:

Software Version:

SCHEDULE A/B: PROPERTY AND EXPLANATIONS

In re: Gerald Lynn Bishop and Jennifer Lynn Bishop

Debtors

Case No. 25-10188-TMD

Chapter 7

SCHEDULE A/B: PROPERTY

Part 1: Cash and cash equivalents

Cash on hand	$ 0.00
Checking, savings, money market, or other financial accounts (Identify institutions, accounts, and last 4 digits of account numbers)	
Cash Bank of America Checking Acct ending 7000	$ 0.00

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) SCHOLARSHIPS	219	1,004,000			
(2) IMMERSIVE JEWISH EXPERIENCE AWARDS - PROVIDES NEED AND MERIT BASED SCHOLARSHIPS FOR LOCAL AND OVERSEAS TRIPS AND CAMPS FOR TEENS AND YOUNG ADULTS	623	803,000			
(2)					
(3)					
(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:	PROCEDURES FOR MONITORING THE USE OF DOMESTIC GRANT FUNDS: TARGETED GRANTS GENERALLY REQUIRE TWO ANNUAL REPORTS (A MID-YEAR AND A FINAL REPORT). THE REPORTS INCLUDE NARRATIVE, STATISTICAL, AND FINANCIAL COMPONENTS AND SERVE TO ENSURE THAT PROGRAMMATIC OBJECTIVES ARE APPROPRIATELY ATTAINED, AND THAT EXPENDITURES QUALIFY FOR REIMBURSEMENT UNDER THE GRANT. UJA STAFF MEMBERS REVIEW THE REPORTS TO ENSURE APPROPRIATE USE OF THE FUNDS AND TO ASSESS IF GOALS WERE ACHIEVED. FINAL PAYMENTS ARE RELEASED TO THE GRANTEES ACCORDINGLY. (CONTINUED IN PART IV) SCHEDULE I, PART I, LINE 2, PROCEDURES FOR MONITORING THE USE OF DOMESTIC GRANT FUNDS (CONTINUED): UJA ALSO PROVIDES CORE OPERATING SUPPORT (UNRESTRICTED) GRANTS TO VARIOUS CORE PARTNERS. THE ORGANIZATION CONDUCTS A PERIODIC REVIEW OF THESE AGENCIES AND REQUIRES COMPLETION OF AN AGENCY ACCOUNTABILITY GUIDELINES SURVEY REGARDING BEST PRACTICES.
SCHEDULE I, PART II, GRANTS TO THE JEWISH FEDERATIONS OF NORTH AMERICA:	UJA REPORTS GRANTS ON SCHEDULE I TO THE JEWISH FEDERATIONS OF NORTH AMERICA (JFNA), AND THE AMERICAN JEWISH JOINT DISTRIBUTION COMMITTEE, INC. (JDC), WHICH ARE 501(C)(3) DOMESTIC U.S. CHARITIES. JFNA AND JDC ARE THE UMBRELLA ORGANIZATION FOR DOMESTIC JEWISH FEDERATIONS, AND JFNA IS THE PRINCIPAL VEHICLE THROUGH WHICH UJA DISTRIBUTES FUNDS FOR OVERSEAS PROGRAM ACTIVITIES. DISTRIBUTIONS BY JFNA GO PRIMARILY TO THE JEWISH AGENCY FOR ISRAEL AND JDC. JFNA AND JDC FILE SEPARATE FORMS 990 AND REPORT THE DETAIL OF OVERSEAS GRANTS ON SCHEDULE F. ORGANIZATIONS RECEIVING FUNDS FROM JFNA AND JDC UTILIZE SUCH FUNDS FOR ACTIVITIES AND PROGRAMS THAT SUPPORT UJA'S CHARITABLE PURPOSES. THE FOLLOWING IS A LISTING OF $28,118,000 OF TARGETED GRANTS MADE THROUGH JFNA: A NEW WAY - $8,000 ACHIM L'CHAIM - BROTHERS FOR LIFE - $73,000 AGUDA ACHAT - $79,000 AISH HATORAH - $17,000 AJEEC-NISPED - $263,000 AMCHA-NATIONAL ISRAELI CENTER FOR PSYCHOSOCIAL SUPPORT OF SURVIVORS - $300,000 APPLESEEDS ACADEMY - $40,000 ASHDOD FOUNDATION - $430,000 ASSOCIATION OF ETHIOPIAN JEWS - $32,000 ATIDNA - $150,000 AVIV FOR HOLOCAUST SURVIVORS - $100,000 BEIT RUTH - $64,000 BEIT TEFILAH ISRAELI - $58,000 BEN GURION UNIVERSITY OF THE NEGEV - $317,000 BENETIVEI UDI - $165,000 BET ELAZRAKI CHILDRENS HOME - $30,000 BINA: THE JEWISH MOVEMENT FOR SOCIAL CHANGE - $150,000 CENTER ORGANIZATIONS OF HOLOCAUST SURVIVORS IN ISRAEL - $53,000 CLALIT HEALTH - $10,500,000 CO-IMPACT - $100,000 CYBERWELL LTD - $38,000 DERECH AMI - $40,000 DESERT STARS - $196,000 ERETZ-IR - $50,000 ESHEL CHABAD - $8,000 FRIENDS OF ATIDIM - $83,000 GVAHIM - $40,000 HAND IN HAND: CENTER FOR JEWISH-ARAB EDUCATION IN ISRAEL - $77,000 HASHOMER HATZAIR - $17,000 HAVAZELET CULTURAL & EDUCATIONAL INSTITUTES OF HASHOMER HATZAIR - $150,000 HEBREW UNIVERSITY OF JERUSALEM - $1,456,000 HILMA: TECH FOR IMPACT - $110,000 JEWISH FEDERATION OF NORTH AMERICA - $150,000 IGY - $105,000 ISH LEREEHO OLAM HESED IBANE - $10,000 ISRAAID: THE ISRAEL FORUM FOR INTERNATIONAL HUMANITARIAN AID - $75,000 ISRAEL DEMOCRACY INSTITUTE - $100,000 ISRAEL HOFSHEET - $190,000 ISRAEL TRAUMA COALITION - $250,000 ISRAELI ALUMNI ASSOCIATION FORUM - $6,000 ITACH MA'AKI - WOMEN LAWYERS FOR SOCIAL JUSTICE - $11,000 JERUSALEM VARIETY CENTER - $150,000 KEDMA - $250,000 KEREN SHEMESH - $50,000 K'FAR GALIM - $165,000 KOLECH - RELIGIOUS WOMEN'S FORUM - $14,000 KREMBO WINGS - $8,000 LANDMARKS (TSYUNEI DERECH) - $55,000 LATET - ISRAELI HUMANITARIAN AID - $135,000 LEAD - YOUTH LEADERSHIP DEVELOPMENT - $25,000 LEADERS OF THE FUTURE - $27,000 LESHEM MIFALIM HINUCHIIM - $230,000 LEV CHASH - $13,000 LOTUS: WOMEN'S HIGH TECH HUB - $60,000 MACHON TARANY AYELET HASACHAR - $17,000 MANUFACTURERS' ASSOCIATION OF ISRAEL - $85,000 MAOZ - $250,000 MASHABIM: COMMUNITY STRESS PREVENTION CENTER - $190,000 MASORTI (CONSERVATIVE) MOVEMENT - $150,000 MATAN INVESTING IN THE COMMUNITY - $26,000 MATZMICHIM - $8,000 MECHON HADAR ISRAEL - $150,000 METIV HERZOG ISRAEL CENTER FOR THE TREATMENT OF PSYCHOTRAUMA - $72,000 METSULOT - $17,000 NEEMANEI TORA VEAVODA - $65,000 NEFESH B'NEFESH ALIYAH - $105,000 NETZACH YISRAEL LECHINUCH VEHACHSHARA - $53,000 NISSAN - NATIV ACTING STUDIO - $25,000 NITZANIM: JEWISH ISRAELI IDENTITY - $72,000 OGEN: FREE LOAN FUND - $90,000 OLIM BEYAHAD - $180,000 ONE MILLION LOBBY - $35,000 ONO ACADEMIC COLLEGE - $90,000 OR LANEGEV VELAGALIL - $150,000 PNIMA ISRAEL - $30,000 REICHMAN UNIVERSITY - $30,000 RISHON LEZION FOUNDATION - $345,000 SAMI SHAMOON COLLEGE OF ENGINEERING (R.A.) - $34,000 SCHECHTER INSTITUTE OF JEWISH STUDIES - $10,000 SELAH - THE ISRAEL CRISIS MANAGEMENT CENTER (ICMC) - $57,000 SHALOM HARTMAN INSTITUTE - $65,000 SHETALTEM NIGUNIM - $25,000 SHISHI SHABBAT YISRAELI - $55,000 SHURAT HADIN - $35,000 SIKKUY: THE ASSOCIATION FOR THE ADVANCEMENT OF CIVIC EQUALITY - $100,000 SIRAJ: ADVANCING HI-TECH FOR THE BEDOUIN COMMUNITY - $50,000 SONDUK EL YANABIA - $100,000 SPECIAL OLYMPICS ISRAEL - $10,000 TEATRO: A CENTER FOR CREATIVITY, CULTURE AND COMMUNITY - $12,000 TECH2PEACE (R.A) - $45,000 TEVA IVRI - $62,000 THE ABRAHAM FUND INITIATIVES - $8,000 THE AGUDA - ISRAEL'S LGBT TASK FORCE - $19,000 THE BE'ER SHEVA FOUNDATION - $280,000 THE BERL KATZNELSON CENTER - $54,000 THE HAIFA ASSOCIATION FOR IMMIGRANT ABSORPTION - $480,000 THE ISRAEL MOVEMENT FOR PROGRESSIVE JUDAISM - $155,000 THE JAFFA INSTITUTE - $330,000 THE JEWISH AGENCY FOR ISRAEL (PROGRAMS IN FORMER SOVIET UNION) - $1,469,000 THE JEWISH AGENCY FOR ISRAEL (RESPONSE TO CRISIS - UKRAINE) - $1,410,000 THE JEWISH AGENCY FOR ISRAEL (OTHER PROGRAMS) - $2,300,000 THE JERUSALEM HILLS THERAPEUTIC CENTERS - $8,000 THE JEWISH PEOPLE POLICY INSTITUTE - $75,000 THE NETANYA FOUNDATION - $480,000 THE SHALDAG FOUNDATION - $532,000 THE YAACOV HERZOG CENTER FOR JEWISH STUDIES - $27,000 TSEIRIM BEYERUHAM - $85,000 TZOHAR - $85,000 WORLD ORT KADIMA MADA - $13,000 YESODOT LEZMICHA DROR - $70,000 SHALVA - THE ISRAEL ASSOCIATION FOR CARE AND INCLUSION OF PERSONS WITH DISABILITIES - $70,000 THE FOLLOWING IS A LISTING OF $194,000 OF TARGETED GRANTS MADE THROUGH JDC: EUROPEAN UNION OF JEWISH STUDENTS-$101,000 JUICE-$93,000

Additional Data

Return to Form

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

2022

Open to Public Inspection

Name of the organization
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

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**		
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**		
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, 1099-MISC compensation, and/or 1099-NEC			(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				
1 ERIC S GOLDSTEIN CHIEF EXECUTIVE OFFICER	(i)	612,520	200,000	9,504	9,150	52,752	883,926	0
	(ii)	0	0	0	0	0	0	0
2 IRVIN AROSENTHAL-TERM123122 CHIEF FINANCIAL OFFICER	(i)	496,472	0	61,497	54,128	54,639	666,736	45,083
	(ii)	0	0	0	0	0	0	0
3 ELLEN R ZIMMERMAN SECRETARY/GEN'L COUNSEL & CCO	(i)	383,708	0	17,510	19,919	22,465	443,602	5,654
	(ii)	0	0	0	0	0	0	0
4 MARK MEDIN EXEC. VICE PRESIDENT - FRD	(i)	581,532	375,000	6,377	188,476	51,295	1,202,680	343,750
	(ii)	0	0	0	0	0	0	0
5 DEVANA COHEN CHIEF INVESTMENT OFFICER	(i)	583,634	274,844	2,034	9,150	24,563	894,225	0
	(ii)	0	0	0	0	0	0	0
6 GRAHAM CANNON CHIEF MARKETING OFFICER	(i)	374,149	0	5,601	11,956	49,496	441,202	0
	(ii)	0	0	0	0	0	0	0
7 DEBORAH JOSELOW CHIEF PLANNING OFFICER	(i)	362,355	0	5,393	19,855	47,755	435,358	0
	(ii)	0	0	0	0	0	0	0
8 LOUISA CHAFEE-TERM 3123 SENIOR VICE PRESIDENT	(i)	328,251	0	1,650	1,359	3,172	334,432	0
	(ii)	0	0	0	0	0	0	0
9 RUTH RASKAS-HIRED 7522 CHIEF GROWTH OFFICER	(i)	151,569	0	410	0	1,761	153,740	0
	(ii)	0	0	0	0	0	0	0
10 BRITTANY LAROCHE DIRECTOR, INVESTMENTS	(i)	273,696	80,885	144	7,743	1,273	363,741	0
	(ii)	0	0	0	0	0	0	0
11 ELLIOT HASDAN DIRECTOR, INVESTMENTS	(i)	286,980	106,394	162	9,150	45,676	448,362	0
	(ii)	0	0	0	0	0	0	0
12 STUART TAUBER VICE PRESIDENT, REGIONS	(i)	304,765	0	9,930	16,877	55,409	386,981	377
	(ii)	0	0	0	0	0	0	0
13 WILLIAM SAMERS VP, PLANNED GIVING & ENDOWNMENTS	(i)	304,176	0	3,032	9,946	54,719	371,873	0
	(ii)	0	0	0	0	0	0	0
14 COURTNEY WEINSTEIN VICE PRESIDENT, AFFINITY	(i)	293,286	0	615	9,052	3,071	306,024	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 4B	SUPPLEMENTAL NON-QUALIFIED RETIREMENT PLAN PARTICIPATION: THE FOLLOWING EMPLOYEES MUST REMAIN IN THE EMPLOY OF UJA UNTIL THE AGE OF VESTING UNDER THE NON-QUALIFIED RETIREMENT PLAN IN ORDER TO REALIZE THE FOLLOWING BENEFITS ACCRUED DURING THE PERIOD JULY 1, 2022 - JUNE 30, 2023 AND REFLECTED IN SCHEUDLE J, PART II, COLUMN C: MARK MEDIN - $29,476 IRVIN ROSENTHAL - $16,809 ELLEN ZIMMERMAN - $4,843 DEBORAH JOSELOW - $4,068 GRAHAM CANNON - $2,836 STUART TAUBER - $1,801 WILLIAM SAMERS - $911 COURTNEY WEINSTEIN - $47 MARK MEDIN - SCHEDULE J, PART II, COLUMN B (II) $375,000 ,WAS PAID IN FISCAL 2023 FOR SATISFYING THE CRITERIA OF REMAINING IN THE EMPLOY OF UJA FROM OCTOBER 1, 2019 UNTIL SEPTEMBER 30, 2022. SCHEDULE J, PART II, COLUMN F, $343,750 IS THE PORTION OF THE $375,000 BONUS THAT WAS PAID IN FISCAL 2023 BUT REPORTED IN PREVIOUS FORM 990S, SPECIFICALLY IN SCHEDULE J, PART II, COLUMN C IN FISCAL 2020 THROUGH 2022. THE BALANCE OF $31,250 IS REFLECTED IN SCHEDULE J, PART II, COLUMN C FOR FISCAL 2023. IN ORDER TO RECEIVE THE FOLLOWING BENEFITS REPORTED IN SCHEDULE J, PART II, COLUMN C, MARK MEDIN MUST REMAIN IN THE EMPLOY OF UJA UNTIL: SEPTEMBER 30, 2022 - $31,250 SEPTEMBER 30, 2025 - $112,500

Additional Data

Return to Form

Software ID:

Software Version:

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

2022

Open to Public Inspection

Name of the organization
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

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	BUILD NYC RESOURCE CORP	45-4040561	12008ECW4	08-14-2014	31,258,000	CURRENT REFUNDING ISSUE		X		X		X

Part II Proceeds

		A	B	C	D
1	Amount of bonds retired				
2	Amount of bonds legally defeased				
3	Total proceeds of issue	31,258,000			
4	Gross proceeds in reserve funds				
5	Capitalized interest from proceeds				
6	Proceeds in refunding escrows				
7	Issuance costs from proceeds	563,000			
8	Credit enhancement from proceeds				
9	Working capital expenditures from proceeds				
10	Capital expenditures from proceeds				
11	Other spent proceeds				
12	Other unspent proceeds	14,000			
13	Year of substantial completion				

		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 2020, a current refunding issue)?	X							
15	Were the bonds issued as part of an advance refunding issue of taxable bonds (or, if issued prior to 2020, an advance refunding issue)?		X						
16	Has the final allocation of proceeds been made?	X							
17	Does the organization maintain adequate books and records to support the final allocation of proceeds?	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						
2	Are there any lease arrangements that may result in private business use of bond-financed property?		X						
3a	Are there any management or service contracts that may result in private business use of bond-financed property?		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						
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						
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						
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						

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						
2	If "No" to line 1, did the following apply?								
a	Rebate not due yet?		X						
b	Exception to rebate?		X						
c	No rebate due?		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						

Part IV Arbitrage (Continued)

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
4a	Has the organization or the governmental issuer entered into a qualified hedge with respect to the bond issue?		X						
b	Name of provider								
c	Term of hedge								
d	Was the hedge superintegrated?								
e	Was the hedge terminated?								
5a	Were gross proceeds invested in a guaranteed investment contract (GIC)?		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						
7	Has the organization established written procedures to monitor the requirements of section 148? . . .		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						

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

Return Reference	Explanation

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

2022

Open to Public Inspection

Name of the organization
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

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	206	5,084,000	SELLING PRICE
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 ▶ (ISRAEL BONDS)	X	6	281,000	FACE VALUE
26 Other ▶ ( )				
27 Other ▶ ( )				
28 Other ▶ ( )				

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** |

		Yes	No
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**	Yes	
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, LINE 32B:	PART I: THE ORGANIZATION UTILIZES INDEPENDENT BROKERS TO SELL SECURITIES AND COLLECTIBLES, IF ANY, CONTRIBUTED TO THE ORGANIZATION.

Additional Data

Return to Form

Software ID:

Software Version:

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

SCHEDULE N (Form 990)

Department of the Treasury
Internal Revenue Service

Liquidation, Termination, Dissolution, or Significant Disposition of Assets

- ▶ Complete if the organization answered "Yes" on Form 990, Part IV, lines 31 or 32; or Form 990-EZ, line 36.
- ▶ Attach certified copies of any articles of dissolution, resolutions, or plans.
- ▶ Attach to Form 990 or 990-EZ.
- ▶ Go to *www.irs.gov/Form990* for the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

Part I **Liquidation, Termination, or Dissolution.** Complete this part if the organization answered "Yes" on Form 990, Part IV, line 31, or Form 990-EZ, line 36. Part I can be duplicated if additional space is needed.

1	**(a)** Description of asset(s) distributed or transaction expenses paid	**(b)** Date of distribution	**(c)** Fair market value of asset(s) distributed or amount of transaction expenses	**(d)** Method of determining FMV for asset(s) distributed or transaction expenses	**(e)** EIN of recipient	**(f)** Name and address of recipient	**(g)** IRC section of recipient(s) (if tax-exempt) or type of entity

			Yes	No
2	Did or will any officer, director, trustee, or key employee of the organization:			
a	Become a director or trustee of a successor or transferee organization?	2a		
b	Become an employee of, or independent contractor for, a successor or transferee organization?	2b		
c	Become a direct or indirect owner of a successor or transferee organization?	2c		
d	Receive, or become entitled to, compensation or other similar payments as a result of the organization's liquidation, termination, or dissolution?	2d		

e If the organization answered "Yes" to any of the questions on lines 2a through 2d, provide the name of the person involved and explain in Part III. ▶

Part I **Liquidation, Termination, or Dissolution** (continued)

Note. If the organization distributed all of its assets during the tax year, then Form 990, Part X, column (B), line 16 (Total assets), and line 26 (Total liabilities), should equal -0-.

			Yes	No
3	Did the organization distribute its assets in accordance with its governing instrument(s)? If "No," describe in Part III	3		
4a	Is the organization required to notify the attorney general or other appropriate state official of its intent to dissolve, liquidate, or terminate?	4a		
b	If "Yes," did the organization provide such notice?	4b		
5	Did the organization discharge or pay all of its liabilities in accordance with state laws?	5		
6a	Did the organization have any tax-exempt bonds outstanding during the year?	6a		
b	If "Yes" on line 6a, did the organization discharge or defease all of its tax-exempt bond liabilities during the tax year in accordance with the Internal Revenue Code and state laws?	6b		

c If "Yes" on line 6b, describe in Part III how the organization defeased or otherwise settled these liabilities. If "No" on line 6b, explain in Part III.

Part II **Sale, Exchange, Disposition, or Other Transfer of More Than 25% of the Organization's Assets.** Complete this part if the organization answered "Yes" on Form 990, Part IV, line 32, or Form 990-EZ, line 36. Part II can be duplicated if additional space is needed.

1 (a) Description of asset(s) distributed or transaction expenses paid	(b) Date of distribution	(c) Fair market value of asset(s) distributed or amount of transaction expenses	(d) Method of determining FMV for asset(s) distributed or transaction expenses	(e) EIN of recipient	(f) Name and address of recipient	(g) IRC section of recipient(s) (if tax-exempt) or type of entity
INVESTMENT ASSETS	07-01-2022	1,037,249,000	FMV	87-3040261	NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND LLC 130 EAST 59TH STREET NEW YORK,NY 10022	LLC

			Yes	No
2	Did or will any officer, director, trustee, or key employee of the organization:			
a	Become a director or trustee of a successor or transferee organization?	2a		
b	Become an employee of, or independent contractor for, a successor or transferee organization?	2b		
c	Become a direct or indirect owner of a successor or transferee organization?	2c		
d	Receive, or become entitled to, compensation or other similar payments as a result of the organization's significant disposition of assets?	2d		

e If the organization answered "Yes" to any of the questions on lines 2a through 2d, provide the name of the person involved and explain in Part III. ▶

Part III **Supplemental Information.**

Provide the information required by Part I, lines 2e and 6c, and Part II, line 2e. Also complete this part to provide any additional information.

Return Reference	Explanation
SCHEDULE N, PART II, LINE 1	NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND, LLC (JIIF) - ON JULY 1, 2022, UJA-FEDERATION TRANSFERRED IN-KIND APPROXIMATELY $1.037 BILLION IN INVESTMENT ASSETS TO THE NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND, LLC (JIIF). JIIF IS A CHARITABLE POOLED INVESTMENT FUND SPONSORED AND MANAGED BY UJA-FEDERATION. IN ADDITION TO MANAGING MOST OF UJA-FEDERATION'S ENDOWMENT ASSETS AND SIMILAR LONG-DURATION ASSETS OF SUPPORTING ORGANIZATIONS, UJA-FEDERATION GRANTEES AND SYNAGOGUES, JEWISH DAY SCHOOLS, AND OTHER JEWISH INSTITUTIONS WITH WHICH UJA-FEDERATION MAINTAINS RELATIONSHIPS MAY ALSO INVEST SIMILAR KINDS OF ASSETS IN JIIF. JIIF IS A LIMITED LIABILITY COMPANY THAT IS EXEMPT FROM REGISTRATION UNDER THE INVESTMENT COMPANY ACT OF 1940 BY VIRTUE OF BEING A CHARITABLE POOLED INVESTMENT VEHICLE. AS OF JUNE 30, 2023, UJA-FEDERATION HAD A MEMBERSHIP INTEREST IN JIIF OF 91.7%; 35 OTHER NON-PROFIT INSTITUTIONS LOCATED PRIMARILY IN THE GREATER NEW YORK AREA HELD THE BALANCE OF THE OWNERSHIP INTEREST.

Additional Data

Return to Form

Software ID:

Software Version:

SCHEDULE O
(Form 990)

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

2022

Open to Public Inspection

Name of the organization
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

Return Reference	Explanation
FORM 990, PART III, LINE 2	SINCE THE OCTOBER 7,2023 ATTACKS ON ISRAEL, UJA HAS MOBILIZED ITS NONPROFIT NETWORK AND DONOR COMMUNITY TO PROVIDE IMMEDIATE AND LONG-TERM RELIEF TO THE PEOPLE OF ISRAEL. AS OF THE FILING OF THIS TAX RETURN, WE HAVE ALLOCATED MORE THAN $94 MILLION IN GRANTS FOR TRAUMA SUPPORT AND REHABILITATION, CARE FOR EVACUEES FROM BORDER COMMUNITIES, MEDICAL EQUIPMENT AND SUPPLIES FOR HOSPITALS AND FIRST RESPONDERS, AND MORE. ADDITIONALLY, TO MEET EMERGENCY NEEDS HERE AT HOME IN RESPONSE TO THE SURGE IN ANTISEMITISM BORNE OUT OF THE WAR IN ISRAEL, UJA HAS ALLOCATED AN ADDITIONAL $6 MILLION TO STRENGTHEN AND PROTECT THE JEWISH COMMUNITY ACROSS NEW YORK. FOR A FULL ACCOUNTING OF UJA'S ALLOCATIONS IN RESPONSE TO THE ISRAEL-HAMAS WAR BOTH IN ISRAEL AND LOCALLY PLEASE VISIT OUR WEBSITE AT WWW.UJAFEDNY.ORG.
FORM 990, PART VI, SECTION A, LINE 2	FAMILY AND BUSINESS RELATIONSHIPS AMONG OFFICERS, DIRECTORS AND KEY EMPLOYEES: DONALD BERNSTEIN, DIRECTOR AND BRIAN S. LICHTER, DIRECTOR - BUSINESS RELATIONSHIP JAY D. CHAZANOFF, DIRECTOR AND LAWRENCE J. COHEN, DIRECTOR - BUSINESS RELATIONSHIP DAVID B. EDELSON, DIRECTOR AND ADAM F. WEISSENBERG, DIRECTOR - BUSINESS RELATIONSHIP BENJAMIN FINKELSTEIN, DIRECTOR AND ZOYA RAYNES FRIEDMAN, DIRECTOR - BUSINESS RELATIONSHIP WAYNE K. GOLDSTEIN, DIRECTOR AND TARA SLONE-GOLDSTEIN, DIRECTOR - FAMILY RELATIONSHIP WAYNE K. GOLDSTEIN, DIRECTOR AND JEFFREY A. KESWIN, TREASURER & DIRECTOR - BUSINESS RELATIONSHIP MICHAEL R. KESSLER, DIRECTOR AND SHIMON SHKURY, DIRECTOR - BUSINESS RELATIONSHIP BRIAN S. LICHTER, DIRECTOR AND CERTAIN RELATED VENDORS AS CLIENTS OF HIS LAW FIRM - BUSINESS RELATIONSHIP DAVID SILVERS, DIRECTOR AND PATRICIA SILVERS, DIRECTOR - FAMILY RELATIONSHIP JEFFREY M. STERN, DIRECTOR AND MICHAEL L. STERN, DIRECTOR - FAMILY RELATIONSHIP RACHEL R. STERN, DIRECTOR AND MICHAEL R. BARON, DIRECTOR - BUSINESS RELATIONSHIP
FORM 990, PART VI, SECTION B, LINE 11B	DESCRIPTION OF PROCESS FOR REVIEW OF FORM 990: INITIALLY, FORM 990 IS REVIEWED BY THE AUDIT COMMITTEE OF THE BOARD AND RECOMMENDED FOR APPROVAL BY THE EXECUTIVE COMMITTEE. THE DRAFT DOCUMENT IS THEN DISTRIBUTED TO, REVIEWED AND APPROVED BY THE EXECUTIVE COMMITTEE. AFTER OBTAINING EXECUTIVE COMMITTEE APPROVAL, FORM 990 IS DISTRIBUTED ELECTRONICALLY TO ALL BOARD MEMBERS PRIOR TO ITS FILING.
FORM 990, PART VI, SECTION B, LINE 12C	UJA-FEDERATION'S ETHICS AND CONFLICTS COMMITTEE MONITORS AND ENFORCES COMPLIANCE WITH THE ORGANIZATION'S CONFLICT OF INTEREST POLICY.
FORM 990, PART VI, SECTION B, LINE 15	PURSUANT TO ITS BYLAWS, UJA-FEDERATION HAS A COMPENSATION COMMITTEE, COMPOSED OF INDEPENDENT DIRECTORS OF THE ORGANIZATION. THE COMMITTEE REVIEWS AND APPROVES THE COMPENSATION OF THE MOST HIGHLY COMPENSATED EXECUTIVES OF UJA-FEDERATION. UJA RETAINS AN INDEPENDENT COMPENSATION CONSULTANT TO PROVIDE COMPARABILITY DATA IN ORDER TO DEMONSTRATE THE REASONABLENESS OF THE RECOMMENDED COMPENSATION FOR SENIOR EXECUTIVES OF UJA-FEDERATION. THE DELIBERATIONS OF THE COMPENSATION COMMITTEE ARE CONTEMPORANEOUSLY RECORDED IN MINUTES OF THE COMMITTEE; THOSE MINUTES ARE CIRCULATED TO AND APPROVED BY THE MEMBERS OF THE COMPENSATION COMMITTEE.
FORM 990, PART VI, SECTION C, LINE 19	UJA'S CONFLICT OF INTEREST POLICY, ETHICAL GUIDELINES AND FINANCIAL STATEMENTS ARE MADE AVAILABLE TO THE PUBLIC ON ITS WEBSITE AND BY REQUEST.
FORM 990, PART X, BALANCE SHEET, LINE 12	NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND, LLC (JIIF) - ON JULY 1, 2022, UJA-FEDERATION TRANSFERRED APPROXIMATELY $1.037 BILLION IN INVESTMENT ASSETS TO THE NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND, LLC (JIIF). SEE SCHEDULE N, PART III SUPPLEMENTAL INFORMATION FOR ADDITIONAL DETAILS.
FORM 990, PART XI, LINE 9:	IMPUTED RENTAL INCOME 26,187,000. POSTRETIREMENT BENEFIT CHANGES NOT INCLUDED IN NET PERIODIC BENEFIT COST 139,000.

Additional Data

Return to Form

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

2022

Open to Public Inspection

Name of the organization
UNITED JEWISH APPEAL-FEDERATION OF
JEWISH PHILANTHROPIES OF NEW YORK INC

Employer identification number
51-0172429

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
(1) 212-00 23RD AVENUE LLC 130 EAST 59TH STREET NEW YORK, NY 10022 83-2811001	REAL ESTATE HOLDING LLC	NY		750,000	UJA
(2) 3328 CONEY ISLAND AVENUE LLC 130 EAST 59TH STREET NEW YORK, NY 10022 83-2797504	REAL ESTATE HOLDING LLC	NY		720,000	UJA
(3) 344 EAST 14 STREET LLC 130 EAST 59TH STREET NEW YORK, NY 10022 83-2858824	REAL ESTATE HOLDING LLC	NY		0	UJA
(4) 3495 NOSTRAND AVENUE LLC 130 EAST 59TH STREET NEW YORK, NY 10022 83-2777679	REAL ESTATE HOLDING LLC	NY		2,570,000	UJA
(5) 58-20 LITTLE NECK PKWY LLC 130 EAST 59TH STREET NEW YORK, NY 10022 83-2875340	REAL ESTATE HOLDING LLC	NY		0	UJA
(6) 9502 SEAVIEW AVENUE LLC 130 EAST 59TH STREET NEW YORK, NY 10022 83-2891313	REAL ESTATE HOLDING LLC	NY		0	UJA
(7) 185 COLONIAL SPRINGS ROAD LLC 130 EAST 59TH STREET NEW YORK, NY 10022 85-4102734	REAL ESTATE HOLDING LLC	NY		0	UJA
(8) 392 DENNYTOWN ROAD LLC 130 EAST 59TH STREET NEW YORK, NY 10022 85-3947327	REAL ESTATE HOLDING LLC	NY	102,000	2,307,000	UJA
(9) QH QUEENS BOULEVARD LLC 77-17 QUEENS BLVD ELMHURST, NY 11373 86-3702046	REAL ESTATE HOLDING LLC	NY	37,000	9,145,000	UJA

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	No
(1)BLAU FAMILY FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3386869	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(2)FEDERATION THRIFT SHOP INC 130 EAST 59TH STREET NEW YORK, NY 10022 13-2854418	PUBLIC CHARITY	NY	501(C)(3)	SCHEDULE A, LINE 10	UJA	Yes	
(3)JEWISH COMMUNAL FUND 575 MADISON AVENUE NEW YORK, NY 10022 23-7174183	PUBLIC CHARITY	NY	501(C)(3)	SCHEDULE A, LINE 7	SEE SCHEDULE R PART VII	Yes	
(4)THE BARON DE HIRSCH FUND 130 EAST 59TH STREET NEW YORK, NY 10022 13-5562971	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(5)THE BUNIM FUND 130 EAST 59TH STREET NEW YORK, NY 10022 13-4091263	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(6)THE CAROLINE AND JOSEPH S GRUSS LIFE MONUMENT FUNDS INC 45 BROADWAY SUITE 3050 NEW YORK, NY 10006 13-3573461	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12B	SEE SCHEDULE R PART VII	Yes	
(7)THE CASLOW FAMILY FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-4008908	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(8)THE DAVID AND JUDY FLEISCHER FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 03-0433540	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(9)THE DORIS AND ISAAC MOINESTER FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3797662	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(10)THE DUBIN FAMILY FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3863354	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(11)THE ERIC & TAMAR GOLDSTEIN FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 16-1647207	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(12)THE FREDMAN LICHTENSTEIN FAMILY FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-4131687	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(13)THE FRIDSON FAMILY FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-4082250	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(14)THE JEANNETTE R & SIDNEY L SOLOMON FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3852165	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(15)THE JOAN & JEROME R JAKUBOVITZ FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3797217	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(16)THE JOEL & ORA BENTON MONROE BENTON MEMORIAL FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3927715	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(17)THE MARC AND HARRIET SUVALL FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3978407	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(18)THE RICHARD C AND LISA N PERRY FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3864962	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(19)THE ROBERT & MARILYN FRIEDSON FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3801041	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(20)THE SELTZER FAMILY FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3799971	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(21)THE SIDNEY AND MIRIAM LOEWY FRIEND FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3801851	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(22)THE SOL AND MILDRED LEDERMAN FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 27-4349693	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(23)THE WANDERER FAMILY FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 59-3814958	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(24)THE WILLIAM AND ELEANOR GREENBLATT FAMILY FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3792270	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(25)THE ZIFF HERITAGE FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 51-0599051	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	Yes	
(26)U F PROPERTY CORP 130 EAST 59TH STREET NEW YORK, NY 10022 51-0188274	REAL ESTATE HOLDING COMPANY	NY	501(C)(2)		UJA	Yes	
(27)UJA-FED PROPERTIES INC 130 EAST 59TH STREET NEW YORK, NY 10022 13-4043266	REAL ESTATE HOLDING COMPANY	NY	501(C)(2)		UJA	Yes	
(28)THE LEVY FAMILY FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022 13-3499576	SUPPORTING ORGANIZATION	NY	501(C)(3)	SCHEDULE A, LINE 12A	SEE SCHEDULE R PART VII	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) Disproportionate allocations? Yes	(h) Disproportionate allocations? No	(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner? Yes	(j) General or managing partner? No	(k) Percentage ownership
(1) 225 FOURTH COMPANY HOLDING LLC 130 EAST 59TH STREET NEW YORK, NY 10022 13-3935925	REAL ESTATE	NY	N/A	UNRELATED	25,000			No	25,000	Yes		25.000 %
(2) NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND LLC 130 EAST 59TH STREET NEW YORK, NY 10022 87-3040261	INVESTMENTS	DE	UJA	UNRELATED	34,667,000	1,064,074,000		No	736,000	Yes		91.700 %

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) Section 512(b)(13) controlled entity? No
(1)NETWORK ADVANTAGE LTD 141 FRONT STREET 3RD FLOOR HAMILTON HM19 BD 98-1283814	INVESTMENT COMPANY	BD	N/A	C	-2,032,000	16,734,000	100.000 %	Yes	
(2)NETWORK AGENCY INSURANCE LTD 141 FRONT STREET 3RD FLOOR HAMILTON HM19 BD 98-1459746	CAPTIVE INSURANCE COMPANY	BD	N/A	C	7,927,000	63,492,000	100.000 %	Yes	
(3)CHARITABLE REMAINDER TRUSTS (28)	CHARITABLE REMAINDER TRUSTS	NY	N/A					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		No
e Loans or loan guarantees by related organization(s)	1e		No
f Dividends from related organization(s)	1f	Yes	
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		No
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	Yes	
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		No
q Reimbursement paid by related organization(s) for expenses	1q	Yes	
r Other transfer of cash or property to related organization(s)	1r	Yes	
s Other transfer of cash or property from related organization(s)	1s	Yes	

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) NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND LLC	B	1,037,249,000	CAPITAL CONTRIBUTION - IN KIND
(2) NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND LLC	B	25,079,000	CAPITAL CONTRIBUTION
(3) JEWISH COMMUNAL FUND	C	24,196,000	GRANTS RECEIVED
(4) THE JOEL & ORA BENTON MONROE BENTON MEMORIAL FOUNDATION	C	770,000	GRANTS RECEIVED
(5) THE JEANETTE R & SIDNEY L SOLOMON FOUNDATION	C	87,000	GRANTS RECEIVED
(6) THE SELTZER FAMILY FOUNDATION	C	75,000	GRANTS RECEIVED
(7) THE WANDERER FAMILY FOUNDATION	C	54,000	GRANTS RECEIVED
(8) NETWORK ADVANTAGE LTD	F	800,000	DIVIDENDS RECEIVED
(9) NETWORK AGENCY INSURANCE LTD	F	600,000	DIVIDENDS RECEIVED
(10) JEWISH COMMUNAL FUND	Q	4,483,000	ACTUAL EXPENSE AMOUNTS
(11) NETWORK AGENCY INSURANCE LTD	R	1,324,000	ACTUAL CASH TRANSFERS
(12) THE BARON DE HIRSCH FUND	R	775,000	ACTUAL CASH TRANSFERS
(13) THE ERIC & TAMAR GOLDSTEIN FOUNDATION	R	680,000	ACTUAL CASH TRANSFERS
(14) THE DAVID & JUDY FLEISCHER FOUNDATION	R	137,000	ACTUAL CASH TRANSFERS
(15) THE JEANETTE R & SIDNEY L SOLOMON FOUNDATION	R	86,000	ACTUAL CASH TRANSFERS
(16) THE MARC AND HARRIET SUVALL FOUNDATION	R	82,000	ACTUAL CASH TRANSFERS
(17) BLAU FAMILY FOUNDATION	R	75,000	ACTUAL CASH TRANSFERS
(18) THE LEVY FAMILY FOUNDATION	R	75,000	ACTUAL CASH TRANSFERS
(19) THE WANDERER FAMILY FOUNDATION	R	71,000	ACTUAL CASH TRANSFERS
(20) THE SOL AND MILDRED LEDERMAN FOUNDATION	R	60,000	ACTUAL CASH TRANSFERS
(21) NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND LLC	R	1,880,000	ACTUAL CASH TRANSFERS
(22) NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND LLC	S	52,221,000	CAPITAL WITHDRAWALS
(23) UJA-FED PROPERTIES INC	S	2,770,000	ACTUAL CASH TRANSFERS
(24) JEWISH COMMUNAL FUND	S	1,630,000	ACTUAL CASH TRANSFERS
(25) NETWORK AGENCY INSURANCE LTD	S	1,157,000	ACTUAL CASH TRANSFERS
(26) NEW YORK JEWISH INSTITUTIONS INVESTMENT FUND LLC	S	1,133,000	ACTUAL CASH TRANSFERS
(27) CHARITABLE REMAINDER TRUSTS (1)	S	106,000	ACTUAL CASH TRANSFERS
(28) THE MARC AND HARRIET SUVALL FOUNDATION	S	70,000	ACTUAL CASH TRANSFERS

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)** Disproportionate 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
SCHEDULE R, PART II, COLUMN (F) - DIRECT CONTROLLING ENTITY	THE RELATED TAX-EXEMPT ORGANIZATIONS IN PART II INCLUDE THE JEWISH COMMUNAL FUND ("JCF"), A DONOR ADVISED FUND OF WHICH UJA IS THE SOLE MEMBER, THE CAROLINE AND JOSEPH S. GRUSS LIFE MONUMENT FUNDS ("GRUSS FUNDS"), AND 23 OTHER SUPPORTING ORGANIZATIONS. ALTHOUGH JCF, THE GRUSS FUNDS, AND THE OTHER 23 SUPPORTING ORGANIZATIONS MEET THE DEFINITION OF A CONTROLLED ENTITY UNDER INTERNAL REVENUE CODE SECTION 512(B)(13),UJA, JCF, AND THE GRUSS FUNDS DO NOT BELIEVE THAT THE ASSETS OF JCF AND THE GRUSS FUNDS ARE AVAILABLE TO MEET THE OBLIGATIONS OF UJA. SIMILARLY, ALTHOUGH UJA NAMES A MAJORITY OF THE DIRECTORS OF EACH OF THE 23 OTHER SUPPORTING ORGANIZATIONS AND ALTHOUGH UJA AND ITS NETWORK AGENCIES RECEIVED APPROXIMATELY 57.1% AND 9.3%, RESPECTIVELY, OF THE TOTAL GRANTS MADE BY THESE SUPPORTING ORGANIZATIONS DURING THE FIVE YEAR PERIOD ENDED JUNE 30, 2023, THE DIRECTORS OF THE SUPPORTING ORGANIZATIONS HAVE AN INDEPENDENT FIDUCIARY DUTY TO THE ORGANIZATIONS. AS A RESULT, UJA BELIEVES THAT THE ASSETS OF THESE SUPPORTING ORGANIZATIONS ARE NOT AVAILABLE TO MEET THE OBLIGATIONS OF UJA.

Additional Data

Return to Form

Software ID:

Software Version: