

EISNERAMPER

AMERICAN JEWISH HISTORICAL SOCIETY

FINANCIAL STATEMENTS

DECEMBER 31, 2019 and 2018



AMERICAN JEWISH HISTORICAL SOCIETY

Contents

	<u>Page</u>
Independent Auditors' Report	1
Financial Statements	
Statements of financial position as of December 31, 2019 and 2018	2
Statements of activities for the years ended December 31, 2019 and 2018	3
Statement of functional expenses for the year ended December 31, 2019 (with summarized financial information for December 31, 2018)	4
Statement of functional expenses for the year ended December 31, 2018	5
Statements of cash flows for the years ended December 31, 2019 and 2018	6
Notes to financial statements	7

INDEPENDENT AUDITORS' REPORT

The Board of Trustees
American Jewish Historical Society

Report on the Financial Statements

We have audited the accompanying financial statements of the American Jewish Historical Society (the "Society"), which comprise the statements of financial position as of December 31, 2019 and 2018, the related statements of activities, functional expenses, and cash flows for each of the years then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

The Society's management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the organization's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the organization's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the American Jewish Historical Society as of December 31, 2019 and 2018, and the changes in its net assets and its cash flows for each of the years then ended, in accordance with accounting principles generally accepted in the United States of America.



EISNERAMPER LLP
New York, New York
November 12, 2020



AMERICAN JEWISH HISTORICAL SOCIETY

Statements of Financial Position

	December 31,	
	<u>2019</u>	<u>2018</u>
ASSETS		
Cash and cash equivalents	\$ 436,668	\$ 307,457
Contributions receivable, net	146,590	121,000
Other accounts receivable	2,600	-
Investments	5,439,217	4,536,670
Prepaid expenses	20,474	16,454
Property and equipment, net	<u>-</u>	<u>7,200</u>
	<u>\$ 6,045,549</u>	<u>\$ 4,988,781</u>
LIABILITIES AND NET ASSETS		
Liabilities:		
Accounts payable and other liabilities	\$ 133,196	\$ 94,698
Deferred compensation obligation, net	<u>101,959</u>	<u>214,106</u>
Total liabilities	<u>235,155</u>	<u>308,804</u>
Commitments and uncertainty (Notes F and K)		
Net assets:		
Without donor restrictions:		
Undesignated and available for general activities	<u>5,165,684</u>	<u>4,145,773</u>
With donor restrictions:		
Purpose restrictions	150,567	76,651
Time restricted for future periods	146,590	110,000
Perpetual in nature	<u>347,553</u>	<u>347,553</u>
Total net assets with donor restrictions	<u>644,710</u>	<u>534,204</u>
Total net assets	<u>5,810,394</u>	<u>4,679,977</u>
	<u>\$ 6,045,549</u>	<u>\$ 4,988,781</u>

AMERICAN JEWISH HISTORICAL SOCIETY

Statements of Activities

	Year Ended December 31,			
	2019		2018	
	Without Donor Restrictions	With Donor Restrictions	Without Donor Restrictions	With Donor Restrictions
	Total	Total	Without Donor Restrictions	With Donor Restrictions
Public support:				
Contributions, grants and bequests	\$ 1,022,002	\$ 219,590	\$ 801,732	\$ 250,000
Special events (net of direct benefit to donors of \$36,211 in 2019 and \$66,345 in 2018)	420,597	-	453,795	-
Donated services	5,362	-	-	-
Total public support	<u>1,447,961</u>	<u>219,590</u>	<u>1,255,527</u>	<u>250,000</u>
Investment and other revenues:				
Investment income, spending rate	133,258	11,820	134,968	11,817
Archival	220,686	-	355,480	-
Royalties	33,750	-	30,018	-
Rentals	46,486	-	46,390	-
Miscellaneous	974	-	2,424	-
Total investment and other revenues	<u>435,154</u>	<u>11,820</u>	<u>569,280</u>	<u>11,817</u>
Total public support and revenues before net assets released from restrictions	<u>1,883,115</u>	<u>231,410</u>	<u>1,824,807</u>	<u>261,817</u>
Net assets released from restrictions	<u>144,044</u>	<u>(144,044)</u>	<u>300,354</u>	<u>(300,354)</u>
Total support and revenue	<u>2,027,159</u>	<u>87,366</u>	<u>2,125,161</u>	<u>(38,537)</u>
Expenses:				
Program services:				
Library and archive	318,374	-	663,607	-
Exhibits	469,068	-	114,872	-
Publications	32,948	-	46,904	-
Public programs	203,187	-	177,512	-
Total program services	<u>1,023,577</u>	<u>-</u>	<u>1,002,895</u>	<u>-</u>
Supporting services:				
Management and general	429,420	-	401,943	-
Fund-raising	257,889	-	466,963	-
Total supporting services	<u>687,309</u>	<u>-</u>	<u>868,906</u>	<u>-</u>
Total expenses	<u>1,710,886</u>	<u>-</u>	<u>1,871,801</u>	<u>-</u>
Change in net assets, before non-operating activity	316,273	87,366	253,360	(38,537)
Non-operating activity:				
Investment income(loss), net of authorized spending rate (see Note C)	<u>703,638</u>	<u>23,140</u>	<u>(361,615)</u>	<u>(12,450)</u>
Change in net assets	1,016,971	110,506	(108,255)	(50,987)
Net assets, beginning of year	<u>4,145,773</u>	<u>534,204</u>	<u>4,254,028</u>	<u>585,191</u>
Net assets, end of year	<u>\$ 5,165,684</u>	<u>\$ 644,710</u>	<u>\$ 4,145,773</u>	<u>\$ 534,204</u>

See notes to financial statements.

AMERICAN JEWISH HISTORICAL SOCIETY

Statement of Functional Expenses Year Ended December 31, 2019

(with summarized financial information for December 31, 2018)

	Program Services					Supporting Services			Total
	Library and Archive	Exhibits	Publications	Public Programs	Total Program Services	Management and General	Fund-raising	Total Supporting Services	
Salaries and related expenses:									
Salaries	\$ 151,806	\$ 112,500	\$ -	\$ 66,473	\$ 330,779	\$ 153,922	\$ 108,674	\$ 262,596	\$ 915,606
Payroll taxes and employee benefits	11,713	42,852	-	26,733	81,298	51,544	22,214	73,758	165,357
Total salaries and related expenses	<u>163,519</u>	<u>155,352</u>	-	<u>93,206</u>	<u>412,077</u>	<u>205,466</u>	<u>130,888</u>	<u>336,354</u>	<u>1,080,963</u>
Other expenses:									
Insurance	-	-	-	-	-	48,090	-	48,090	32,088
Occupancy	53,629	50,950	-	30,568	135,147	67,386	42,927	110,313	233,772
Office	288	-	-	3,413	3,701	16,133	28,293	44,426	41,513
Installation and photography	-	19,757	-	2,275	22,032	-	1,325	1,325	31,514
Digitization and storage	99,233	1,240	-	-	100,473	4,083	2,411	6,494	139,421
Travel and entertainment	72	5,250	21	13,266	18,609	5,216	4,806	10,022	31,266
Printing	60	-	32,614	450	33,124	11,693	3,116	14,809	45,372
Advertising and promotion	-	35,423	-	33,081	68,504	1,128	4,619	5,747	62,343
Solicitation	-	2,101	313	5,357	7,771	7,926	37,522	45,448	86,433
Professional fees	-	197,500	-	17,420	214,920	53,342	264	53,606	70,166
Catering expenses	-	-	-	-	-	-	36,211	36,211	66,345
Miscellaneous	-	-	-	3,254	3,254	6,981	459	7,440	7,350
Total other expenses	<u>153,282</u>	<u>312,221</u>	<u>32,948</u>	<u>109,084</u>	<u>607,535</u>	<u>221,978</u>	<u>161,953</u>	<u>383,931</u>	<u>847,583</u>
Total expenses before depreciation	316,801	467,573	32,948	202,290	1,019,612	427,444	292,841	720,285	1,928,546
Depreciation	1,573	1,495	-	897	3,965	1,976	1,259	3,235	9,600
Total expenses	318,374	469,068	32,948	203,187	1,023,577	429,420	294,100	723,520	1,938,146
Less: direct benefit to donor	-	-	-	-	-	-	(36,211)	(36,211)	(66,345)
Total expenses per statements of activities	<u>\$ 318,374</u>	<u>\$ 469,068</u>	<u>\$ 32,948</u>	<u>\$ 203,187</u>	<u>\$ 1,023,577</u>	<u>\$ 429,420</u>	<u>\$ 257,889</u>	<u>\$ 687,309</u>	<u>\$ 1,871,801</u>

See notes to financial statements.

AMERICAN JEWISH HISTORICAL SOCIETY

Statement of Functional Expenses Year Ended December 31, 2018

	Program Services					Supporting Services			Total
	Library and Archive	Exhibits	Publications	Public Programs	Total Program Services	Management and General	Fund- raising	Total Supporting Services	2018
Salaries and related expenses:									
Salaries	344,482	62,106	-	95,328	501,916	173,984	239,706	413,690	915,606
Payroll taxes and employee benefits	79,473	4,068	-	25,509	109,050	31,145	25,162	56,307	165,357
Total salaries and related expenses	423,955	66,174	-	120,837	610,966	205,129	264,868	469,997	1,080,963
Other expenses:									
Insurance	12,073	2,177	-	3,341	17,591	6,096	8,401	14,497	32,088
Occupancy	91,474	14,278	-	26,072	131,824	44,799	57,149	101,948	233,772
Office	850	-	161	579	1,590	27,047	12,876	39,923	41,513
Installation and photography	-	20,369	-	2,400	22,769	3,251	5,494	8,745	31,514
Digitization and storage	115,482	-	-	-	115,482	21,989	1,950	23,939	139,421
Travel and entertainment	960	-	-	5,401	6,361	17,038	7,867	24,905	31,266
Printing	-	-	28,743	550	29,293	3,185	12,894	16,079	45,372
Advertising and promotion	13,850	11,264	-	7,112	32,226	15,980	14,137	30,117	62,343
Solicitation	391	24	-	2,058	2,473	10,035	73,925	83,960	86,433
Professional fees	-	-	18,000	5,813	23,813	42,012	4,341	46,353	70,166
Catering expenses	-	-	-	-	-	-	66,345	66,345	66,345
Miscellaneous	816	-	-	2,278	3,094	3,542	714	4,256	7,350
Total other expenses	235,896	48,112	46,904	55,604	386,516	194,974	266,093	461,067	847,583
Total expenses before depreciation	659,851	114,286	46,904	176,441	997,482	400,103	530,961	931,064	1,928,546
Depreciation	3,756	586	-	1,071	5,413	1,840	2,347	4,187	9,600
Total expenses	663,607	114,872	46,904	177,512	1,002,895	401,943	533,308	935,251	1,938,146
Less: direct benefit to donor	-	-	-	-	-	-	(66,345)	(66,345)	(66,345)
Total expenses per statements of activities	663,607	114,872	46,904	177,512	1,002,895	401,943	466,963	868,906	1,871,801

See notes to financial statements.

AMERICAN JEWISH HISTORICAL SOCIETY

Statements of Cash Flows

	Year Ended December 31,	
	<u>2019</u>	<u>2018</u>
Cash flows from operating activities:		
Change in net assets	\$ 1,130,417	\$ (159,242)
Adjustments to reconcile change in net assets to net cash provided by operating activities:		
Depreciation	7,200	9,600
Donated securities	(312,355)	(199,059)
Proceeds from sale of donated securities	312,355	199,059
Realized and unrealized (gains) losses on investments	(762,466)	414,345
Changes in:		
Contributions receivable, net	(25,590)	(27,563)
Other accounts receivable	(2,600)	88,364
Prepaid expenses	(4,020)	11,956
Accounts payable and other liabilities	38,498	(102,028)
Deferred revenue	-	(10,000)
Deferred compensation obligation, net	(112,147)	(12,237)
Net cash provided by operating activities	<u>269,292</u>	<u>213,195</u>
Cash flows from investing activities:		
Purchases of securities	(494,077)	(188,513)
Proceeds from sales of securities	<u>353,996</u>	<u>151,817</u>
Net cash used in investing activities	<u>(140,081)</u>	<u>(36,696)</u>
Increase in cash	129,211	176,499
Cash, beginning of year	<u>307,457</u>	<u>130,958</u>
Cash, end of year	\$ <u>436,668</u>	\$ <u>307,457</u>
Supplemental disclosure of cash flow information:		
Donated services	<u>\$ 5,362</u>	<u>\$ -</u>
Federal taxes paid	<u>\$ 2,600</u>	<u>\$ -</u>

See notes to financial statements.

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE A - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

[1] Organization:

The American Jewish Historical Society (the "Society"), incorporated in Washington, D.C. in 1898, was founded for the collection, preservation, exhibition, publication, and popularization of material of every kind having reference to the settlement, history, and life of Jews on the American continent. In addition, the Society's programs include the promotion and encouragement of research in, and the study of, Jewish history in general, and particularly in its relation to American Jewish history, and in connection with the causes and nature of Jewish emigration from various parts of the world to the American continent.

The Society is a not-for-profit corporation exempt from federal income taxes under Section 501(c)(3) of the U.S. Internal Revenue Code (the "Code") and from state and local taxes under comparable laws.

[2] Basis of accounting:

The financial statements of the Society have been prepared using the accrual basis of accounting and conform to accounting principles generally accepted in the United States of America ("U.S. GAAP") as applicable to not-for-profit organizations.

[3] Use of estimates:

The preparation of financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets, liabilities, public support and revenues and expenses, as well as the disclosure of contingent assets and liabilities. Actual results may differ from those estimates.

[4] Investments:

The Society's investments in equity securities and mutual funds are reported at their fair values in the statements of financial position based on quoted market prices. Money market funds held as part of the investment portfolio are also included in the balances reported as investments.

The Society's investments, in general, are subject to various risks, such as interest-rate, market, and credit risks. Due to the level of risk associated with certain investment vehicles, it is at least reasonably possible that changes in the values of those securities could occur in the near term and that such changes could materially affect the amounts reported in the financial statements.

Investment transactions are recorded on a trade-date basis. Realized gains and losses on investments sold, and unrealized appreciation and depreciation on investments held, are reported in the statements of activities as increases or decreases in net assets without donor restrictions unless their use is restricted through donor stipulation. Realized gains and losses on investments are determined by comparison of the cost basis to proceeds at the time of disposition. Unrealized gains and losses on investments are determined by comparing each investment's cost to the fair value at the end of each year. The earnings from dividends and interest are recognized when earned.

Donated securities are recorded at their estimated fair values on the dates of donation. The Society's policy is to sell donated securities immediately, and, accordingly, for purposes of the statements of cash flows, donated securities received and the proceeds generated from their sales are included within operating activities.

The Board of Trustees has adopted a portfolio spending policy whereby a predetermined amount of each year's investment assets is used to fund current operations. For both 2019 and 2018, respectively, the spending rate policy was calculated as 3% of the prior three-year rolling average of semi-annual market values.

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE A - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

[5] Property and equipment:

Property and equipment are stated at their original costs at the dates of acquisition, or, if contributed, at their estimated fair values at the dates of donation, net of accumulated depreciation. The Society capitalizes items of property and equipment that have a cost of \$7,500 or more and useful lives greater than one year, whereas minor costs of repairs and maintenance are expensed as incurred. Depreciation is calculated using the straight-line method over estimated useful lives of the related assets which range from five to ten years.

Management evaluates the recoverability of the investment in long-lived assets on an on-going basis and recognizes any impairment in the year of determination. Long-lived assets were tested for impairment as of December 31, 2019 and 2018, respectively, and in the opinion of management, there were no impairments. It is reasonably possible that relevant conditions could change in the near term and necessitate a change in management's estimate of the recoverability of these assets.

[6] Collections:

The Society maintains three collections:

- (i) a library collection of over 37,000 volumes and 300 periodical titles, to provide important and secondary material for researchers and the general public;
- (ii) archives of the written and oral legacy of the American Jewish experience, with over 16,000 linear feet containing 1,500 collections, over 500 memoirs and manuscripts, and more than 1,000 photos; and
- (iii) a collection of various works of art and artifacts preserving a critical, visual record of American-Jewish history and material culture, including almost 100 paintings, approximately 100 silver collection pieces, historic American Jewish Sports artifacts and memorabilia, historic handwritten letters, and religious artifacts that document American-Jewish life.

All collection items are catalogued and preserved, and activities verifying their existence and assessing their condition are performed regularly. In accordance with the collection policies of museums, the cost or value of these collections is not included in the statements of financial position. Each of the three collections receives new items each year through contributions that are not included in the financial statements.

Items purchased by the Society for the collections, primarily for the library, are recorded as expenses in the year in which the items are purchased. The collections are insured for an amount up to \$7,000,000 through policies maintained by the Society.

The Society reviews its collections on an ongoing basis and may periodically acquire or de-access items. Proceeds from deaccessions are classified as without donor restrictions, except when donor restrictions apply.

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE A - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

[7] Net assets:

The net assets of the Society and changes therein are reported as follows:

(i) *Net Assets Without Donor Restrictions:*

The Society's net assets without donor restrictions represent those resources that are not subject to donor restrictions as to their use and are available for current operations.

(ii) *Net Assets With Donor Restrictions:*

Net assets with donor restrictions represent those resources that are subject to donor-imposed restrictions, such as specific purposes and/or the passage of time. Also included in net assets with donor restrictions are donor restrictions that are perpetual in nature and subject to the requirements of Washington D.C.'s Uniform Prudent Management of Institutional Funds Act ("UPMIFA"). These donors have stipulated that those resources be maintained in perpetuity with the resultant income and net capital appreciation arising from the underlying assets to be used in the satisfaction of the wishes of those donors. When a donor restriction expires, that is, when a stipulated time restriction ends, a purpose restriction is accomplished, or funds are appropriated through action of the Board of Trustees, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statements of activities as "net assets released from restrictions."

[8] Revenue recognition:

(i) *Contributions, special events, grants, and bequests:*

Contributions to the Society are recognized as revenue upon the receipt of either cash, other assets, or of unconditional pledges. Contributions are recorded as "with donor restrictions" if they are received with donor stipulations or time considerations as to their use. Gross proceeds paid by attendees at special events held as fundraising activities represent contribution revenue as well as the payment of the direct cost of the benefit received by the attendee at the event. Special-event income is reported net of the direct benefit to donors. Special event revenues, other than contributions, applicable to a current year are recognized as revenue in the year the special event takes place. Special event revenue for a future year's period is deferred and recognized when the event takes place. Conditional contributions are recognized when the donor's conditions have been met by requisite actions of the Society's management or the necessary events have taken place, and if received in advance, are recognized in the statements of financial position as funds received in advance. The Society records bequest income at the time it has an established right to a bequest and the proceeds are measurable. Contributions to be received over periods longer than a single year are discounted at an interest rate commensurate with the risk involved.

Grant revenue is recognized based on the terms of each individual grant and is available without donor restriction, unless the donor or grantor restricts the use thereof. Conditional grant receipts received in advance of the Society fulfilling its obligation, in accordance with the grant contract, are reported as "funds received in advance" in the statements of financial position.

(ii) *Archival processing revenue:*

Archival processing revenues applicable to a current year are recognized as revenue in the year the service takes place. Archival processing revenues received for a future years' service is deferred and recognized when the service is rendered.

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE A - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

[8] Revenue recognition: (continued)

(iii) Other revenues:

Other revenues are recognized when services have been rendered.

(iv) Donated services:

For recognition of donated services in the Society's financial statements, such services must: (i) create or enhance non-financial assets; and (ii) typically need to be acquired if not provided by donation. Additionally, recognition of donated services must: (i) require a specialized skill; and (ii) be provided by individuals possessing these skills. Donated services are recorded at their estimated fair values at the dates of donation and are reported without donor restriction. Donated services are reported as both contributions and offsetting expenses in the statements of activities. During 2019, the Society received donated auction items in the amount of \$5,362.

[9] Accrued vacation:

Accrued vacation is included as a liability in the financial statements and represents the Society's obligation for the potential cost of unused employee vacation time that would be payable in the event that these employees leave the Society. At December 31, 2019 and 2018, the accrued vacation obligation was \$5,481 and \$20,308, respectively, and was reported as part of accounts payable and accrued expenses in the accompanying statements of financial position.

[10] Functional allocation of expenses:

The costs of providing the Society's various programs and supporting services have been summarized on a functional basis in the statements of functional expenses. Accordingly, direct costs have been functionalized within the program and supporting services based on the nature of the expense. Indirect costs have been allocated based on the basis of time and effort by employees.

[11] Advertising costs:

The Society expenses the cost of advertising as incurred. Advertising expenses were \$32,320 and \$37,329 during 2019 and 2018, respectively.

[12] Measure of operations:

The Society includes in its definition of operations all revenues and expenses that are an integral part of its programs and supporting activities. Investment income (loss), net of authorized spending rate, is recognized as part of non-operating activities in the statements of activities.

[13] Income taxes:

The Society is subject to the provisions of the Financial Accounting Standards Board's (the "FASB") Accounting Standards Codification ("ASC") Topic 740, *Income Taxes*, relating to accounting and reporting for uncertainty in income-tax obligations. Because of the Society's general tax-exempt status, management believes ASC Topic 740 has not had, and is not anticipated to have, a material impact on the Society's financial statements.

Subsequent to year-end, the provision in the tax code requiring the Society to remit a tax attributable to transportation fringe benefits was repealed retroactively to December 31, 2017, therefore eliminating the Society's obligation for this tax.

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE A - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

[14] Adoption of accounting pronouncements:

(i) *Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made:*

In June 2018, the FASB issued Accounting Standards Update (“ASU”) No. 2018-08, *Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made (Topic 985)*. ASU No. 2018-08 clarifies and improves guidance concerning: 1) evaluating whether a transaction should be accounted for as an exchange transaction or as a contribution; and 2) determining whether a contribution received is conditional. ASU No. 2018-08 is effective for annual periods beginning after December 15, 2018 for entities that are resource recipients and periods beginning after December 15, 2019 for entities that are resource providers. ASU No. 2018-08 should be applied on a modified prospective basis. The Society adopted the resource recipient portion for its year ended December 31, 2019, and this accounting guidance did not have a material effect on the Society’s financial statements. Management is in the process of assessing the impact of the resource provider portion of this ASU on the financial statements

(ii) *Disclosure Requirements for Fair-Value Measurements:*

In August 2018, the FASB issued ASU No. 2018-13, *Fair Value Measurement (Topic 820) Disclosure Framework-Changes to the Disclosure Requirements for Fair Value Measurements*, which modified the disclosure requirements for fair value measurements and is effective for years beginning after December 15, 2019, with early adoption permitted. The effect of adopting this accounting guidance will result in the removal or modification of certain fair value measurement disclosures presented in the Society’s financial statements. The Society early adopted this pronouncement as of December 31, 2019, which under U.S. GAAP is a change in accounting principle requiring retroactive application in the financial statements for all periods presented. Analysis of this standard resulted in no significant changes in the Society’s disclosure requirements for fair value measurements, and therefore, no changes to the previously issued audited financial statements was required on a retrospective basis.

[15] Upcoming accounting pronouncements:

(i) *Revenue from Contracts with Customers:*

In May 2014, the FASB issued ASU No. 2014-09, *Revenue from Contracts with Customers (Topic 606)*, which outlines a single comprehensive model for entities to use in accounting for revenue arising from contracts with customers and supersedes most current revenue recognition guidance, including industry specific guidance. ASU No. 2014-09 requires an entity to recognize revenue depicting the transfer of goods or services to customers in an amount that reflects the consideration to which the entity expects to be entitled in exchange for those goods or services. The standard permits the use of either the retrospective or cumulative effect transition method. The adoption of ASU No. 2014-09 is not expected to have a material effect on the financial statements, but will require enhanced disclosures. The new standard is effective for fiscal years beginning after December 15, 2019. Management is in the process of assessing the impact of this ASU on the financial statements.

(ii) *Leases:*

In February 2016, the FASB issued ASU No. 2016-02, *Leases (Topic 842)*, which will require entities to recognize lease assets and lease liabilities (related to leases previously classified as operating under previous U.S. GAAP) on the statements of financial position. The ASU is effective for fiscal years beginning after December 15, 2021. Management is in the process of assessing the impact of this ASU on the financial statements.

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE A - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

[15] Upcoming accounting pronouncements: (continued)

(iii) *Contributed Nonfinancial Assets:*

In September 2020, the FASB issued ASU No. 2020-07, *Not-for-Profit Entities (Topic 958): Presentation and Disclosures by Not-for-Profit Entities for Contributed Nonfinancial Assets*, intended to improve transparency in the reporting of contributed nonfinancial assets, also known as gifts-in-kind, for not-for-profit organizations. The ASU requires a not-for-profit organization to present contributed nonfinancial assets as a separate line item in the statement of activities, apart from contributions of cash or other financial assets. For each category of contributed nonfinancial assets recognized, the not-for-profit organization will need to disclose: (i) qualitative information about whether the contributed nonfinancial assets were either monetized or utilized during the reporting period. If utilized, a description of the programs or other activities in which those assets were used; (ii) the not-for-profit's policy (if any) about monetizing rather than utilizing contributed nonfinancial assets; (iii) a description of any donor-imposed restrictions associated with the contributed nonfinancial assets; (iv) the valuation techniques and inputs used to arrive at a fair value measure, in accordance with the requirements in *Topic 820, Fair Value Measurement*, at initial recognition; and (v) the principal market (or most advantageous market) used to arrive at a fair value measure, if it is a market in which the recipient entity is prohibited by a donor-imposed restriction from selling or using the contributed nonfinancial assets. The amendments in this ASU will be applied on a retrospective basis and are effective for annual reporting periods beginning after June 15, 2021. Management is in the process of assessing the impact of this ASU on the financial statements.

(iv) *Collections:*

In March 2019, the FASB issued ASU No. 2019-03, *Not-for-Profit Entities (Topic 958): Updating the Definition of Collections.*, to align the definition of collections with the American Alliance of Museums' Code of Ethics for Museums, thereby changing the types of collections that are eligible to not be reported as assets in the statements of financial position. The ASU modifies the definition of the term *collections* by expanding the acceptable uses of the proceeds of sales of collection items so that the proceeds can be used to support the direct care of existing collections, in addition to the current requirement that proceeds be used to acquire other items for collections. ASU No. 2019-03 is effective for annual periods beginning after December 15, 2019. Earlier application is permitted. Management is in the process of assessing the impact of this ASU on the financial statements.

[16] Subsequent events:

The Society evaluated subsequent events through November 12, 2020, the date on which the financial statements were available to be issued.

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE B - RECEIVABLES

[1] Contributions receivable:

At each year-end, contributions receivable are scheduled to be received as follows:

	December 31,	
	2019	2018
Less than one year	\$ 87,644	\$ 121,000
One to five years	<u>62,500</u>	-
	150,144	121,000
Reduction of grants receivable due in excess of one year to present value at a rate of 2%	<u>(3,554)</u>	-
	<u>\$ 146,590</u>	<u>\$ 121,000</u>

Based on management's past experience, these receivables are expected to be fully collected and accordingly, no allowance for doubtful accounts has been established.

[2] Other receivables:

At each year-end, other receivables consisted of amounts due to the Society for exchange-type transactions. All amounts are due within one year. Based on management's past experience, these receivables are expected to be fully collected and accordingly, no allowance for doubtful accounts has been established.

NOTE C - INVESTMENTS

At each year-end, investments consisted of the following:

	December 31,			
	2019		2018	
	Fair Value	Cost	Fair Value	Cost
Money market funds	\$ 340	\$ 340	\$ 49,639	\$ 49,639
Equity securities	108,684	108,684	-	-
Mutual funds:				
Equity funds	3,719,886	2,244,919	2,943,043	2,152,605
Fixed-income funds	<u>1,610,307</u>	<u>1,581,743</u>	<u>1,543,988</u>	<u>1,590,835</u>
	<u>\$ 5,439,217</u>	<u>\$ 3,935,686</u>	<u>\$ 4,536,670</u>	<u>\$ 3,793,079</u>

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE C - INVESTMENTS (CONTINUED)

During each year, investment income consisted of the following:

	Year Ended December 31,	
	2019	2018
Unrealized gains (losses)	\$ 759,940	\$ (416,420)
Realized gains	2,526	2,075
Interest and dividends	<u>109,390</u>	<u>187,065</u>
	871,856	(227,280)
Less investment income recognized under spending policy	<u>(145,078)</u>	<u>(146,785)</u>
Investment income (loss), net of authorized spending rate	<u>\$ 726,778</u>	<u>\$ (374,065)</u>

The FASB's ASC Topic 820, *Fair Value Measurements*, establishes a three-level valuation hierarchy of fair-value measurements. These valuation techniques are based on observable and unobservable inputs. Observable inputs reflect market data obtained from independent sources, while unobservable inputs reflect market assumptions. These two types of inputs create the following fair-value hierarchy:

- Level 1: Valuations are based on observable inputs that reflect quoted market prices in active markets for identical investments, at the reporting date.
- Level 2: Valuations are based on (i) quoted prices for similar investments in active markets, or (ii) quoted prices for those investments, or similar investments, in markets that are not active, or (iii) pricing inputs other than quoted prices that are directly or indirectly observable at the reporting date.
- Level 3: Valuations are based on pricing inputs that are unobservable and include situations where there is little, if any, market activity for the investments, or the investments cannot be independently valued.

The availability of market data is monitored by the Society's management to assess the appropriate classification of financial instruments within the fair-value hierarchy. Changes in economic conditions or valuation techniques may require the transfer of financial instruments from one level to another. In such instances, the transfer would be reported at the beginning of the reporting period.

The Society's investments in money market funds and mutual funds are classified entirely within Level 1.

NOTE D - PROPERTY AND EQUIPMENT

At each year-end, property and equipment consisted of the following:

	December 31,	
	2019	2018
Furniture and equipment	\$ 380,319	\$ 380,319
Less accumulated depreciation	<u>(380,319)</u>	<u>(373,119)</u>
	<u>\$ -</u>	<u>\$ 7,200</u>

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE E - DEFERRED-COMPENSATION PLAN

The Society has a nonqualified, unfunded deferred-compensation plan for several former employees. The plan provides for annual payments of varying amounts for the remainder of the former employees' lives or the lives of their spouses, whichever is longer.

The Society's deferred-compensation obligation was \$101,959 and \$214,106 for 2019 and 2018, respectively, and is estimated to be paid as follows:

<u>Year</u>	<u>Amount</u>
2020	\$ 18,000
2021	18,000
2022	18,000
2023	18,000
2024	18,000
Thereafter	<u>18,000</u>
	108,000
Reduction of compensation payable to present value at a 2.33% discount rate	<u>(6,041)</u>
	<u>\$ 101,959</u>

Payments made to the beneficiaries of the plan for 2019 and 2018 were \$25,308 and \$30,528, respectively.

NOTE F - RELATED-PARTY TRANSACTIONS

In October 1995, the Society, along with three other not-for-profit organizations, the Leo Baeck Institute, Inc., the YIVO Institute for Jewish Research, Inc., and the Yeshiva University Museum signed an agreement forming the Center for Jewish History, Inc. (the "Center"), a separate, 501(c)(3) not-for-profit corporation. Thereafter, the American Sephardi Federation entered into a supplemental agreement with the initial members which provided for its membership into the Center. Upon liquidation of the Center, member organizations would be entitled to receive a share of the proceeds of the liquidation, subject to certain senior claims. Liquidation of the Center requires the consent of all member organizations.

The Center provides for the operation of the Society's operating facility, including (i) maintenance of all offices and specialized areas; (ii) control of the mechanical systems for the building; (iii) maintenance of elevators; (iv) support for all technology; (v) security; and (vi) many other related services. The Center also serves as the central repository for the Society's archival documents, books, photographs, paintings, and artifacts. Although the Center derives its revenue from sources typical of not-for-profit enterprises, revenues generated by the Center are not sufficient to cover its operating expenses. For the years 2019 and 2018, the Society and other members agreed to contribute an aggregate amount of \$1,200,000 each year, to cover the Center's operating costs. The amount contributed by each member is based upon the member's allocated space at the Center.

In addition to the facility services agreement, during 2014, the Society and the Center entered into an agreement whereby the Center would provide accounting and other administrative functions to the Society. However, for 2017 and thereafter, the Society amended this relationship with the Center, which will no longer handle the bulk of the accounting services for the Society; instead, the Society will handle its own accounting function. During 2019, the Society came to an agreement with the Center whereby the Center would handle the bulk of the accounting services for the Society. During 2017, the Center and other member organizations entered into an amended agreement that included updated bylaws and other governance-related matters to further enhance and strengthen the collaboration among the five member organizations.

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE F - RELATED-PARTY TRANSACTIONS (CONTINUED)

In relation to its agreements with the Center, the Society incurred operating expenses of \$245,460 and \$233,772 for 2019 and 2018, respectively. Amounts due to the Center were \$16,437 and \$15,158 as of December 31, 2019 and 2018, respectively, and are included in accounts payable and accrued expenses in the accompanying statements of financial position.

NOTE G - NET ASSETS WITH DONOR RESTRICTIONS

At each year-end, net assets with donor restrictions consisted of the following:

	December 31,	
	2019	2018
Purpose restricted:		
Library and archives	\$ 74,925	\$ 17,433
Publications	-	14,709
Public programs	<u>15,000</u>	<u>7,007</u>
	<u>89,925</u>	<u>39,149</u>
Subject to appropriation:		
Accumulated endowment earnings reserved for appropriation	<u>60,642</u>	<u>37,502</u>
Restricted for future periods	<u>146,590</u>	<u>110,000</u>
Perpetual in nature:		
Library and archives	131,550	131,550
Publications	146,311	146,311
Public programs	<u>69,692</u>	<u>69,692</u>
	<u>347,553</u>	<u>347,553</u>
	<u>\$ 644,710</u>	<u>\$ 534,204</u>

Net assets released from restrictions during each year were for the following:

	Year Ended December 31,	
	2019	2018
Library and archives	\$ 508	\$ 167,854
Exhibits	-	50,000
Publications	14,709	-
Public programs	7,007	-
Time	<u>110,000</u>	<u>82,500</u>
	<u>\$ 144,044</u>	<u>\$ 250,354</u>

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE H - ACCOUNTING AND REPORTING FOR ENDOWMENT

[1] The endowment:

The Society's endowment consists of donor-restricted funds established for a variety of purposes as described in Note G.

[2] Interpretation of relevant law:

As discussed in Note A[7](ii), UPMIFA is applicable to all of the Society's donor-restricted endowment funds. The Board of Trustees will continue to adhere to UPMIFA's requirements.

[3] Endowment net-asset composition by type of fund:

	<u>December 31, 2019</u>		
	<u>Amounts Subject to Appropriation</u>	<u>Amounts Held in Perpetuity</u>	<u>Total</u>
Donor-restricted funds	<u>\$ 60,642</u>	<u>\$ 347,553</u>	<u>\$ 408,195</u>
Total endowment funds	<u>\$ 60,642</u>	<u>\$ 347,553</u>	<u>\$ 408,195</u>

	<u>December 31, 2018</u>		
	<u>Amounts Subject to Appropriation</u>	<u>Amounts Held in Perpetuity</u>	<u>Total</u>
Donor-restricted funds	<u>\$ 37,502</u>	<u>\$ 347,553</u>	<u>\$ 385,055</u>
Total endowment funds	<u>\$ 37,502</u>	<u>\$ 347,553</u>	<u>\$ 385,055</u>

Amounts subject to appropriation represent that portion of allocated investment income, derived from endowment assets held in perpetuity, that have not been appropriated by the Board of Trustees for expenditure.

[4] Changes in endowment net assets:

During each year, endowment net assets changed as follows:

	<u>December 31, 2019</u>		
	<u>Amounts Subject to Appropriation</u>	<u>Amounts Held in Perpetuity</u>	<u>Total</u>
Endowment net assets, beginning of year	<u>\$ 37,502</u>	<u>\$ 347,553</u>	<u>\$ 385,055</u>
Investment earnings, net	<u>34,960</u>	<u>-</u>	<u>34,960</u>
Appropriation	<u>(11,820)</u>	<u>-</u>	<u>(11,820)</u>
Endowment net assets, end of year	<u>\$ 60,642</u>	<u>\$ 347,553</u>	<u>\$ 408,195</u>

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE H - ACCOUNTING AND REPORTING FOR ENDOWMENT (CONTINUED)

[4] Changes in endowment net assets: (continued)

	December 31, 2018		
	Amounts Subject to Appropriation	Amounts Held in Perpetuity	Total
Endowment net assets, beginning of year	\$ 49,952	\$ 347,553	\$ 397,505
Investment losses, net	(633)	-	(633)
Appropriation	<u>(11,817)</u>	<u>-</u>	<u>(11,817)</u>
Endowment net assets, end of year	<u>\$ 37,502</u>	<u>\$ 347,553</u>	<u>\$ 385,055</u>

[5] Funds with deficiencies:

Due to unfavorable market fluctuations, from time to time, the fair value of assets associated with individual donor-restricted endowment funds may decline below the historic dollar value of the donor's original, permanently restricted contribution. Under the terms of UPMIFA, the Society has no responsibility to restore such decreases in value. At December 31, 2019 and 2018, there were no funds with deficiencies.

[6] Return objectives and risk parameters:

The Society's Board of Trustees has adopted investment and spending policies for endowment assets that attempt to provide a predictable stream of funding for programs supported by its endowment, while seeking to maintain the purchasing power of the endowment assets and assuming a moderate level of investment risk. Endowment assets are those assets of donor-restricted funds that the Society must hold in perpetuity. Under this policy, as approved by the Board of Trustees, the endowment assets are invested in a manner that is intended to produce acceptable rates of return, with an appropriate level of investment risk.

[7] Strategies employed for achieving objectives:

To satisfy its long-term rate-of-return objectives, the Society relies on a total-return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (interest and dividends). The Society targets a diversified asset allocation that places a greater emphasis on equity-based investments to achieve its long-term return objectives, within prudent risk constraints.

[8] Spending policy and investment objectives:

The Society's Board of Trustees has a policy to appropriate, and did appropriate, for distribution each year 3% of its endowment funds' three-year rolling average of semi-annual market values and has investment objectives to conform to current market conditions.

NOTE J - CREDIT RISK

Financial instruments that potentially subject the Society to concentrations of credit risk consist principally of cash accounts deposited in financial institutions in amounts which, from time to time, may exceed federal insurance limits. However, based on the current Federal Deposit Insurance Coverage, management believes that the Society does not face a significant risk of loss on these accounts that might result from failures of these institutions.

AMERICAN JEWISH HISTORICAL SOCIETY

Notes to Financial Statements December 31, 2019 and 2018

NOTE K - OTHER UNCERTAINTY

The extent of the impact of the coronavirus ("COVID-19") outbreak on the operational and financial performance of the Society will depend on the continued future developments, including the duration and spread of the outbreak and related travel advisories and restrictions and the impact of COVID-19 on overall demand for the Society's program services, all of which are highly uncertain and cannot be predicted. If demand for the Society's services, and the ability of the Society to complete grant-funded services are impacted for an extended period, results of operations may be materially adversely affected.

NOTE L - LIQUIDITY AND AVAILABILITY OF RESOURCES

The following reflects the Society's financial assets as of the statement of financial position date, reduced by amounts not available for general use within one year because of donor-imposed restrictions.

The Society's financial assets available for general use within one year of the statements of financial position date for general expenditure are as follows:

	<u>December 31,</u>	
	<u>2019</u>	<u>2018</u>
Cash	\$ 436,668	\$ 307,457
Contributions and other receivables	149,190	121,000
Investments	<u>5,439,217</u>	<u>4,536,670</u>
Total financial assets available within one year	<u>6,025,075</u>	<u>4,965,127</u>
Less:		
Amounts unavailable for general expenditures within one year, due to:		
Restrictions by donors with purpose restrictions	(150,567)	(76,651)
Restrictions by donors with time-restrictions	(146,590)	(110,000)
Restrictions by donors that are perpetual in nature	<u>(347,553)</u>	<u>(347,553)</u>
Total amounts unavailable for general expenditure within one year	<u>(644,710)</u>	<u>(534,204)</u>
Total financial assets available to meet cash needs for general expenditures within one year	<u>\$ 5,380,365</u>	<u>\$4,430,923</u>

Liquidity policy:

The Society has a policy to structure its financial assets to be available as its general expenditures, liabilities, and other obligations come. The Society's liquidity policy is to ensure that the Society operates with an adequate level of institutional liquidity to minimize risk associated with temporary, unforeseen liquidity needs. Liquid funds that are without donor or restriction will be used to satisfy the minimum liquidity target.

NOTE M - SUBSEQUENT EVENT

Subsequent to year-end, the Society applied for and received a Paycheck Protection Program Loan in the amount of approximately \$133,000.

Form **990**

(Rev. January 2020)

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

2019

Open to Public Inspection

A For the **2019** calendar year, or tax year beginning , **2019**, and ending , **20**

B Check if applicable:

<input type="checkbox"/>	Address change
<input type="checkbox"/>	Name change
<input type="checkbox"/>	Initial return
<input type="checkbox"/>	Final return/terminated
<input type="checkbox"/>	Amended return
<input type="checkbox"/>	Application pending

C Name of organization: AMERICAN JEWISH HISTORICAL SOCIETY

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) Room/suite
15 WEST 16TH STREET - 5TH FLOOR

City or town, state or province, country, and ZIP or foreign postal code
NEW YORK, NY 10011

D Employer identification number: 13-1764804

E Telephone number: (212) 294-6160

F Name and address of principal officer: DR. ANNIE POLLAND
15 WEST 16TH STREET - 5TH FLOOR, NEW YORK, NY 10011

G Gross receipts \$: 2,916,118.

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)

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

J Website: WWW.AJHS.ORG

K Form of organization: Corporation Trust Association Other ▶

L Year of formation: 1898 **M** State of legal domicile: DC

H(c) Group exemption number ▶

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: AJHS PROVIDES ACCESS TO OVER 25 MILLION DOCUMENTS AS WELL AS BOOKS, PHOTOGRAPHS AND ARTIFACTS REFLECTING THE HISTORY OF THE JEWISH PRESENCE IN THE U.S. FROM 1654 TO THE PRESENT.				
	2 Check this box <input type="checkbox"/> 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	22.		
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	22.		
	5 Total number of individuals employed in calendar year 2019 (Part V, line 2a)	5	11.		
	6 Total number of volunteers (estimate if necessary)	6	7.		
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.		
7b Net unrelated business taxable income from Form 990-T, line 39	7b	0.			
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year	1,505,527.	Current Year	1,662,189.
	9 Program service revenue (Part VIII, line 2g)		355,480.		220,686.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)		189,140.		111,916.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		78,832.		81,210.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)		2,128,979.		2,076,001.
	Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)		0.	
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)			1,080,963.		748,431.
16a Professional fundraising fees (Part IX, column (A), line 11e)			0.		0.
b Total fundraising expenses (Part IX, column (D), line 25) ▶ 257,889.					
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)			790,838.		957,093.
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)		1,871,801.		1,705,524.	
19 Revenue less expenses. Subtract line 18 from line 12		257,178.		370,477.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year	4,988,781.	End of Year	6,045,549.
	21 Total liabilities (Part X, line 26)		308,804.		235,155.
	22 Net assets or fund balances. Subtract line 21 from line 20		4,679,977.		5,810,394.

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: *Annie Polland* Date: 11/12/2020

Dr. Annie Polland, Executive Director

Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name: WILLIAM EPSTEIN Preparer's signature: *William Epstein* Date: 11/11/2020 Check if self-employed PTIN: P01307171

Firm's name ▶ EISNERAMPER LLP Firm's EIN ▶ 13-1639826

Firm's address ▶ 733 THIRD AVENUE NEW YORK, NY 10017-2703 Phone no. 212-949-8700

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

For Paperwork Reduction Act Notice, see the separate instructions.

Form **990** (2019)

Application for Automatic Extension of Time To File an Exempt Organization Return

▶ **File a separate application for each return.**
▶ **Go to www.irs.gov/Form8868 for the latest information.**

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.

Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. AMERICAN JEWISH HISTORICAL SOCIETY	Taxpayer identification number (TIN) 13-1764804
	Number, street, and room or suite no. If a P.O. box, see instructions. 15 WEST 16TH STREET - 5TH FLOOR	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. NEW YORK, NY 10011	

Enter the Return Code for the return that this application is for (file a separate application for each return)

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

DR. ANNIE POLLAND

• The books are in the care of ▶ 15 WEST 16TH STREET NEW YORK NY 10011

Telephone No. ▶ 212 294-6160 Fax No. ▶ 212 294-8302

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

1 I request an automatic 6-month extension of time until 11/16, 2020, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ▶ calendar year 2019 or
- ▶ tax year beginning _____, 20____, and ending _____, 20____.

2 If the tax year entered in line 1 is for less than 12 months, check reason: Initial return Final return Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a \$	0.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b \$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c \$	0.

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

ATTACHMENT 1

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 \$ 318,374. including grants of \$) (Revenue \$ 220,686.)

LIBRARY AND ARCHIVE - THE ORGANIZATION WELCOMES ALL RESEARCHERS WHO WISH TO CONDUCT RESEARCH ON AMERICAN JEWISH LIFE FROM FIRST ARRIVAL IN THE AMERICAS TO THE PRESENT DAY. THE LIBRARY CONSISTS OF APPROXIMATELY 50,000 VOLUMES, INCLUDING BOTH BOOKS AND SERIALS (JOURNALS AND PERIODICALS). THE ORGANIZATION HOUSES APPROXIMATELY 1,500 ARCHIVAL COLLECTIONS AND HAS DEVELOPED FINDING AIDS FOR ITS PERSONAL AND INSTITUTIONAL HOLDINGS, AND THEY ARE AVAILABLE ONLINE.

4b (Code:) (Expenses \$ 197,825. including grants of \$) (Revenue \$)

ATTACHMENT 2

4c (Code:) (Expenses \$ 32,948. including grants of \$) (Revenue \$)

PUBLICATIONS - AMERICAN JEWISH HISTORICAL JOURNAL - SCHOLARLY JOURNAL OF PUBLISHED ARTICLES ON AMERICAN JEWISH HISTORY THEMES.

4d Other program services (Describe on Schedule O.) ATTACHMENT 3
(Expenses \$ 469,068. including grants of \$) (Revenue \$)

4e Total program service expenses 1,018,215.

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)? <i>If "Yes," complete Schedule A.</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> (see instructions)?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I.</i>		X
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? <i>If "Yes," complete Schedule C, Part II.</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
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? <i>If "Yes," complete Schedule D, Part I.</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II.</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III.</i>	X	
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? <i>If "Yes," complete Schedule D, Part IV.</i>		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V.</i>	X	
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? <i>If "Yes," complete Schedule D, Part VI.</i>	X	
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? <i>If "Yes," complete Schedule D, Part VII.</i>		X
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? <i>If "Yes," complete Schedule D, Part VIII.</i>		X
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? <i>If "Yes," complete Schedule D, Part IX.</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X.</i>	X	
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)? <i>If "Yes," complete Schedule D, Part X.</i>	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII.</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional.</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E.</i>		X
14a Did the organization maintain an office, employees, or agents outside of the United States?.		X
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? <i>If "Yes," complete Schedule F, Parts I and IV.</i>		X
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? <i>If "Yes," complete Schedule F, Parts II and IV.</i>		X
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? <i>If "Yes," complete Schedule F, Parts III and IV.</i>		X
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? <i>If "Yes," complete Schedule G, Part I</i> (see instructions).		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II.</i>	X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III.</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H.</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
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? <i>If "Yes," complete Schedule I, Parts I and II.</i>		X

Part IV Checklist of Required Schedules (continued)

Table with 3 columns: Question, Yes, No. Rows 22-38 covering various organizational requirements and schedules.

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 []

Table with 3 columns: Question, Yes, No. Rows 1a-1c regarding Form 1096, W-2G forms, and backup withholding rules.

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

Table with columns for question number, question text, and Yes/No response boxes. Includes questions 2a through 16 regarding employee reporting, tax returns, business income, foreign accounts, prohibited transactions, and charitable trusts.

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

Check if Schedule O contains a response or note to any line in this Part VI [X]

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include 1a (22), 1b (22), 2, 3, 4, 5, 6, 7a, 7b, 8a, 8b, 9.

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

Table with 3 columns: Question, Yes, No. Rows include 10a, 10b, 11a, 11b, 12a, 12b, 12c, 13, 14, 15a, 15b, 16a, 16b.

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed DC, MA, NY,
18 Section 6104 requires an organization to make its Forms 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.
19 Describe on 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

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

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

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

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

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

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

(A) Name and title	(B) Average hours per week per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) ANNIE POLLAND EXECUTIVE DIRECTOR	35.00 0.			X			223,573.	0.	0.	
(2) SIDNEY LAPIDUS CHAIRMAN	2.00 2.00	X		X			0.	0.	0.	
(3) FELICIA HERMAN PRESIDENT	1.00 0.	X		X			0.	0.	0.	
(4) SCOTT EINHORN VICE PRESIDENT	1.00 0.	X		X			0.	0.	0.	
(5) JOSHUA H. LANDES VICE PRESIDENT	1.00 0.	X		X			0.	0.	0.	
(6) SHARI LEVY VICE PRESIDENT	1.00 0.	X		X			0.	0.	0.	
(7) SAMUEL R. KARETSKY TREASURER	2.00 0.	X		X			0.	0.	0.	
(8) LILA CORWIN BERMAN TRUSTEE	2.00 2.00	X					0.	0.	0.	
(9) RONALD C. CURHAN TRUSTEE	2.00 0.	X					0.	0.	0.	
(10) PAUL ISAAC TRUSTEE (THRU 12/2019)	1.00 0.	X					0.	0.	0.	
(11) BERNARD J. MICHAEL TRUSTEE	2.00 2.00	X					0.	0.	0.	
(12) DEBORAH DASH-MOORE TRUSTEE	1.00 0.	X					0.	0.	0.	
(13) JEFFREY S. OPPENHEIM, M.D. TRUSTEE	1.00 0.	X					0.	0.	0.	
(14) NANCY T. POLEVOY TRUSTEE	1.00 0.	X					0.	0.	0.	

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) DANA RAUCHER ----- TRUSTEE	1.00 ----- 0.	X						0.	0.	0.
(16) LOUISE P. ROSENFELD ----- TRUSTEE	1.00 ----- 0.	X						0.	0.	0.
(17) JULIE SALAMON ----- TRUSTEE	1.00 ----- 0.	X						0.	0.	0.
(18) BRUCE SLOVIN ----- TRUSTEE	1.00 ----- 2.00	X						0.	0.	0.
(19) MORTON M. STEINBERG ----- TRUSTEE	1.00 ----- 0.	X						0.	0.	0.
(20) RONALD S. TAUBER ----- TRUSTEE	1.00 ----- 0.	X						0.	0.	0.
(21) JUSTIN L. WYNER ----- TRUSTEE	1.00 ----- 0.	X						0.	0.	0.
(22) HEDY ZANKEL ----- TRUSTEE	1.00 ----- 0.	X						0.	0.	0.
(23) LAURENCE ZUCKERMAN ----- TRUSTEE	1.00 ----- 0.	X						0.	0.	0.
1b Sub-total							223,573.	0.	0.	
c Total from continuation sheets to Part VII, Section A							0.	0.	0.	
d Total (add lines 1b and 1c)							223,573.	0.	0.	

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

	Yes	No
3 Did the organization list any former officer, director, or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		X
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? <i>If "Yes," complete Schedule J for such individual</i>	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		X

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

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in 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 Other Similar Amounts	1a	Federated campaigns	1a				
	b	Membership dues	1b				
	c	Fundraising events	1c	420,597.			
	d	Related organizations	1d				
	e	Government grants (contributions) . .	1e	216,675.			
	f	All other contributions, gifts, grants, and similar amounts not included above .	1f	1,024,917.			
	g	Noncash contributions included in lines 1a-1f.	1g	\$ 312,355.			
	h	Total. Add lines 1a-1f			1,662,189.		
	Program Service Revenue	2a	ARCHIVING	Business Code	519120	220,686.	
b							
c							
d							
e							
f		All other program service revenue					
g		Total. Add lines 2a-2f			220,686.		
Other Revenue		3	Investment income (including dividends, interest, and other similar amounts).			109,390.	
	4	Income from investment of tax-exempt bond proceeds .			0.		
	5	Royalties			33,750.		33,750.
	6a	Gross rents	(i) Real	46,486.			
			(ii) Personal				
			6a				
	b	Less: rental expenses	6b				
	c	Rental income or (loss)	6c	46,486.			
	d	Net rental income or (loss)			46,486.		46,486.
	7a	Gross amount from sales of assets other than inventory	(i) Securities	806,432.			
			(ii) Other				
			7a				
			b	Less: cost or other basis and sales expenses . .	7b	803,906.	
	c	Gain or (loss)	7c	2,526.			
	d	Net gain or (loss)			2,526.		2,526.
8a	Gross income from fundraising events (not including \$ 420,597. of contributions reported on line 1c). See Part IV, line 18	8a	36,211.				
		b	Less: direct expenses	8b	36,211.		
		c	Net income or (loss) from fundraising events.		0.		
9a	Gross income from gaming activities. See Part IV, line 19	9a	0.				
		b	Less: direct expenses	9b	0.		
		c	Net income or (loss) from gaming activities.		0.		
10a	Gross sales of inventory, less returns and allowances	10a	0.				
		b	Less: cost of goods sold	10b	0.		
		c	Net income or (loss) from sales of inventory.		0.		
Miscellaneous Revenue	11a	MISCELLANEOUS REVENUES	Business Code	900099	974.		974.
	b						
	c						
	d	All other revenue					
	e	Total. Add lines 11a-11d			974.		
12	Total revenue. See instructions			2,076,001.		413,812.	

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	0.			
2 Grants and other assistance to domestic individuals. See Part IV, line 22	0.			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16	0.			
4 Benefits paid to or for members	0.			
5 Compensation of current officers, directors, trustees, and key employees	223,573.	123,097.	61,377.	39,099.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0.			
7 Other salaries and wages	369,803.	203,608.	101,522.	64,673.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	11,545.	6,357.	3,169.	2,019.
9 Other employee benefits	97,336.	53,592.	26,722.	17,022.
10 Payroll taxes	46,174.	25,423.	12,676.	8,075.
11 Fees for services (nonemployees):				
a Management	0.			
b Legal	2,692.		2,692.	
c Accounting	49,665.		49,665.	
d Lobbying	0.			
e Professional fundraising services. See Part IV, line 17.	0.			
f Investment management fees	0.			
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.) ATCH 4	269,388.	222,691.	8,911.	37,786.
12 Advertising and promotion	74,251.	68,504.	1,128.	4,619.
13 Office expenses	48,127.	3,701.	16,133.	28,293.
14 Information technology	0.			
15 Royalties	0.			
16 Occupancy	245,460.	135,147.	67,386.	42,927.
17 Travel	23,269.	13,247.	5,216.	4,806.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0.			
19 Conferences, conventions, and meetings	0.			
20 Interest	0.			
21 Payments to affiliates	0.			
22 Depreciation, depletion, and amortization	7,200.	3,965.	1,976.	1,259.
23 Insurance	48,090.		48,090.	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a DIGITIZATION AND STORAGE	106,967.	100,473.	4,083.	2,411.
b INSTALLATION AND PHOTOGRAPHY	23,357.	22,032.		1,325.
c PRINTING	47,933.	33,124.	11,693.	3,116.
d MISCELLANEOUS	10,694.	3,254.	6,981.	459.
e All other expenses _____				
25 Total functional expenses. Add lines 1 through 24e	1,705,524.	1,018,215.	429,420.	257,889.
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 <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)	0.			

Part X Balance Sheet

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

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	300,139.	1	379,287.
	2 Savings and temporary cash investments	7,318.	2	57,381.
	3 Pledges and grants receivable, net	121,000.	3	146,590.
	4 Accounts receivable, net.	0.	4	2,600.
	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	0.	5	0.
	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).	0.	6	0.
	7 Notes and loans receivable, net	0.	7	0.
	8 Inventories for sale or use	0.	8	0.
	9 Prepaid expenses and deferred charges	16,454.	9	20,474.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 380,319.		
	b Less: accumulated depreciation.	10b 380,319.		
			7,200.	10c 0.
	11 Investments - publicly traded securities.	4,536,670.	11	5,439,217.
	12 Investments - other securities. See Part IV, line 11	0.	12	0.
	13 Investments - program-related. See Part IV, line 11.	0.	13	0.
	14 Intangible assets	0.	14	0.
15 Other assets. See Part IV, line 11	0.	15	0.	
16 Total assets. Add lines 1 through 15 (must equal line 33)	4,988,781.	16	6,045,549.	
Liabilities	17 Accounts payable and accrued expenses	94,698.	17	133,196.
	18 Grants payable	0.	18	0.
	19 Deferred revenue.	0.	19	0.
	20 Tax-exempt bond liabilities.	0.	20	0.
	21 Escrow or custodial account liability. Complete Part IV of Schedule D.	0.	21	0.
	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	0.	22	0.
	23 Secured mortgages and notes payable to unrelated third parties	0.	23	0.
	24 Unsecured notes and loans payable to unrelated third parties.	0.	24	0.
	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	214,106.	25	101,959.
	26 Total liabilities. Add lines 17 through 25.	308,804.	26	235,155.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	4,145,773.	27	5,165,684.
	28 Net assets with donor restrictions.	534,204.	28	644,710.
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> 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	4,679,977.	32	5,810,394.
33 Total liabilities and net assets/fund balances.	4,988,781.	33	6,045,549.	

Part XI Reconciliation 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	2,076,001.
2	Total expenses (must equal Part IX, column (A), line 25)	2	1,705,524.
3	Revenue less expenses. Subtract line 2 from line 1	3	370,477.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	4,679,977.
5	Net unrealized gains (losses) on investments	5	759,940.
6	Donated services and use of facilities	6	0.
7	Investment expenses	7	0.
8	Prior period adjustments	8	0.
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	5,810,394.

Part XII Financial Statements and Reporting

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

- 1** Accounting method used to prepare the Form 990: Cash Accrual Other _____
 If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant?
 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?
 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?
 If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.
- 3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?
- 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 on Schedule O and describe any steps taken to undergo such audits

	Yes	No
2a		X
2b	X	
2c	X	
3a		X
3b		

Form **990** (2019)

SCHEDULE D (Form 990)

Supplemental Financial Statements

OMB No. 1545-0047

2019

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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.

Name of the organization

AMERICAN JEWISH HISTORICAL SOCIETY

Employer identification number

13-1764804

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.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include total number at end of year, aggregate value of contributions, grants, and end of year, and two yes/no questions about donor advisement.

Part II Conservation Easements.

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

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include purpose(s) of conservation easements, total number of easements, acreage, and number of easements on historic structures, and several yes/no questions about monitoring and reporting.

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.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include questions about reporting art and historical treasures, and amounts required to be reported.

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2019

JSA 9E1268 1.000

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 make 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 program, 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?

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?

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

Table with columns for Amount and rows for 1c Beginning balance, 1d Additions during the year, 1e Distributions during the year, 1f Ending balance.

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?

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

Part V Endowment Funds.

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

Table with columns (a) Current year, (b) Prior year, (c) Two years back, (d) Three years back, (e) Four years back and rows 1a-1g for balance and expenses.

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

- a Board designated or quasi-endowment, b Permanent endowment, c Term endowment

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:

- (i) Unrelated organizations, (ii) Related organizations

Table with Yes/No columns and rows 3a(i), 3a(ii), 3b.

b If "Yes" on line 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.

Table with columns (a) Cost or other basis (investment), (b) Cost or other basis (other), (c) Accumulated depreciation, (d) Book value and rows 1a Land, b Buildings, c Leasehold improvements, d Equipment, e Other.

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)

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)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 12.) . ▶		

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)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

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	
(2) DEFERRED COMPENSATION	101,959.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	101,959.

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 FASB 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		2,841,303.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	759,940.	
b	Donated services and use of facilities	5,362.	
c	Recoveries of prior year grants		
d	Other (Describe in Part XIII.)		
e	Add lines 2a through 2d		765,302.
3	Subtract line 2e from line 1		2,076,001.
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		
b	Other (Describe in Part XIII.)		
c	Add lines 4a and 4b		
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)		2,076,001.

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		1,710,886.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	5,362.	
b	Prior year adjustments		
c	Other losses		
d	Other (Describe in Part XIII.)		
e	Add lines 2a through 2d		5,362.
3	Subtract line 2e from line 1		1,705,524.
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		
b	Other (Describe in Part XIII.)		
c	Add lines 4a and 4b		
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)		1,705,524.

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.

SEE PAGE 5

Part XIII Supplemental Information (continued)

FORM 990, SCHEDULE D, PART III, LINE 1A AND 4

COLLECTIONS:

THE SOCIETY MAINTAINS THREE COLLECTIONS:

(I) A LIBRARY COLLECTION OF OVER 37,000 VOLUMES AND 300 PERIODICAL TITLES, TO PROVIDE IMPORTANT AND SECONDARY MATERIAL FOR RESEARCHERS AND THE GENERAL PUBLIC;

(II) ARCHIVES OF THE WRITTEN AND ORAL LEGACY OF THE AMERICAN JEWISH EXPERIENCE, WITH OVER 16,000 LINEAR FEET CONTAINING 1,500 COLLECTIONS

(III) A COLLECTION OF VARIOUS WORKS OF ART AND ARTIFACTS PRESERVING A CRITICAL, VISUAL RECORD OF AMERICAN-JEWISH HISTORY AND MATERIAL CULTURE PIECES, HISTORIC AMERICAN JEWISH SPORTS ARTIFACTS AND MEMORABILIA, HISTORIC HANDWRITTEN LETTERS, AND RELIGIOUS ARTIFACTS THAT DOCUMENT AMERICAN-JEWISH LIFE.

ALL COLLECTION ITEMS ARE CATALOGUED AND PRESERVED, AND ACTIVITIES VERIFYING THEIR EXISTENCE AND ASSESSING THEIR CONDITION ARE PERFORMED REGULARLY. IN ACCORDANCE WITH THE COLLECTION POLICIES OF MUSEUMS, THE COST OR VALUE OF THESE COLLECTIONS IS NOT INCLUDED IN THE FINANCIAL STATEMENTS. EACH OF THE THREE COLLECTIONS RECEIVES NEW ITEMS EACH YEAR THROUGH CONTRIBUTIONS THAT ARE NOT INCLUDED IN THE STATEMENTS OF FINANCIAL POSITION.

ANNUAL COSTS OF CONSERVATION AND RESTORATION, PURCHASE OF BOOKS, JOURNAL SUBSCRIPTIONS AND OTHER EXPENDITURES FOR THE COLLECTION ARE CHARGED TO EXPENSES WHEN INCURRED. ACCESSIONS TO AND DEACCESSIONS FROM THE ORGANIZATION'S COLLECTION ARE CARRIED OUT IN ACCORDANCE WITH REGULATIONS ADOPTED BY THE BOARD OF TRUSTEES IN JUNE 1988, AND CODIFIED IN A POLICY

Part XIII Supplemental Information (continued)

DOCUMENT ENTITLED STATEMENT OF ACCESSION AND DEACCESSION POLICIES AND PROCEDURES. THE LIBRARY AND ARCHIVAL COLLECTIONS ALLOW THE ORGANIZATION TO FOSTER AWARENESS AND APPRECIATION OF THE AMERICAN JEWISH HERITAGE AND TO SERVE AS A NATIONAL SCHOLARLY RESOURCE FOR RESEARCH THROUGH THE COLLECTION, PRESERVATION AND DISSEMINATION OF MATERIALS RELATING TO AMERICAN JEWISH HISTORY. THE LIBRARY AND ARCHIVAL COLLECTIONS ARE ALSO BEING PRESERVED FOR FUTURE GENERATIONS.

FORM 990, SCHEDULE D, PART V, LINE 4

ENDOWMENT FUNDS: ENDOWMENT FUNDS ARE USED TO SUPPORT THE LIBRARY ARCHIVES, PUBLICATIONS, AND OTHER PUBLIC PROGRAMS.

FORM 990, PART X, QUESTION 2

FIN 48 DISCLOSURE:

THE SOCIETY FOLLOWS THE PROVISIONS OF THE FINANCIAL ACCOUNTING STANDARDS BOARD'S (THE "FASB") ACCOUNTING STANDARDS CODIFICATION ("ASC") TOPIC 740, INCOME TAXES, RELATING TO ACCOUNTING AND REPORTING FOR UNCERTAINTY IN INCOME TAXES. BECAUSE OF THE SOCIETY'S GENERAL TAX-EXEMPT STATUS, MANAGEMENT BELIEVES ASC TOPIC 740 HAS NOT HAD, AND IS NOT ANTICIPATED TO HAVE, A MATERIAL IMPACT ON THE SOCIETY'S FINANCIAL STATEMENTS.

SUBSEQUENT TO YEAR-END, THE PROVISION IN THE TAX CODE REQUIRING THE SOCIETY TO REMIT A TAX ATTRIBUTABLE TO TRANSPORTATION FRINGE BENEFITS WAS REPEALED RETROACTIVELY TO DECEMBER 31, 2017, THEREFORE ELIMINATING THE SOCIETY'S OBLIGATION FOR THIS TAX.

SCHEDULE G
(Form 990 or 990-EZ)

Supplemental Information Regarding Fundraising or Gaming Activities

OMB No. 1545-0047

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

2019

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 990 or Form 990-EZ.

Open to Public Inspection

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

Name of the organization
AMERICAN JEWISH HISTORICAL SOCIETY

Employer identification number
13-1764804

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.

- | | |
|---|--|
| <input type="checkbox"/> a Mail solicitations | <input type="checkbox"/> e Solicitation of non-government grants |
| <input type="checkbox"/> b Internet and email solicitations | <input type="checkbox"/> f Solicitation of government grants |
| <input type="checkbox"/> c Phone solicitations | <input type="checkbox"/> g Special fundraising events |
| <input type="checkbox"/> d In-person solicitations | |

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?		(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
		Yes	No			
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
Total						

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.

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	(b) Event #2	(c) Other events	(d) Total events
		DINNER (event type)	(event type)	(total number)	(add col. (a) through col. (c))
Revenue	1 Gross receipts	456,808.			456,808.
	2 Less: Contributions	420,597.			420,597.
	3 Gross income (line 1 minus line 2)	36,211.			36,211.
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages	36,211.			36,211.
	8 Entertainment				
	9 Other direct expenses				
	10 Direct expense summary. Add lines 4 through 9 in column (d) ▶				36,211.
	11 Net income summary. Subtract line 10 from line 3, column (d) ▶				

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))
		1 Gross revenue			
Direct Expenses	2 Cash prizes				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> 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 ▶ _____

- 15 a 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 to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ \$ _____

Part IV Supplemental Information. Provide the explanation 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).

**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

2019

**Open to Public
Inspection**

Name of the organization

AMERICAN JEWISH HISTORICAL SOCIETY

Employer identification number

13-1764804

Part I Questions Regarding Compensation

1a Check the appropriate 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.

- | | |
|--|--|
| <input type="checkbox"/> First-class or charter travel | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees |
| <input type="checkbox"/> Discretionary spending account | <input type="checkbox"/> Personal services (such as 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

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?

3 Indicate which, if any, of the following the 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.

- | | |
|--|---|
| <input checked="" type="checkbox"/> Compensation committee | <input type="checkbox"/> Written employment contract |
| <input type="checkbox"/> Independent compensation consultant | <input type="checkbox"/> Compensation survey or study |
| <input type="checkbox"/> Form 990 of other organizations | <input checked="" type="checkbox"/> 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?
 - b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?
 - c** Participate in, or receive payment from, an equity-based compensation arrangement?
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only section 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?
 - b** Any related organization?
- 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?
 - b** Any related organization?
- 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 on lines 5 and 6? If "Yes," describe in Part III.

8 Were any amounts reported on Form 990, Part VII, paid or accrued 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.

9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

	Yes	No
1a		
1b		
2		
3		
4a		X
4b		X
4c		X
5a		X
5b		X
6a		X
6b		X
7		X
8		X
9		

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2019

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 aren't listed on Form 990, Part VII.

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

	(A) Name and Title	(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1	ANNIE POLLARD EXECUTIVE DIRECTOR	(i) 223,573. (ii) 0. (iii) 0.	(i) 0. (ii) 0. (iii) 0.	(i) 0. (ii) 0. (iii) 0.	(i) 0. (ii) 0. (iii) 0.	(i) 0. (ii) 0. (iii) 0.	(i) 223,573. (ii) 0. (iii) 0.	(i) 0. (ii) 0. (iii) 0.
2		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
3		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
4		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
5		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
6		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
7		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
8		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
9		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
10		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
11		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
12		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
13		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
14		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
15		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)
16		(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)	(i) (ii) (iii)

Schedule J (Form 990) 2019

Page 3

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.

FORM 990, SCHEDULE J, LINE 3

EXECUTIVE COMPENSATION IS DETERMINED BY THE EXECUTIVE COMMITTEE OF THE

BOARD OF TRUSTEES.

**SCHEDULE M
(Form 990)**

Noncash Contributions

OMB No. 1545-0047

2019

**Open to Public
Inspection**

Department of the Treasury
Internal Revenue Service

- ▶ 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 instructions and the latest information.

Name of the organization

AMERICAN JEWISH HISTORICAL SOCIETY

Employer identification number

13-1764804

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	3.	312,355.	FAIR MARKET VALUE
10 Securities - Closely held stock				
11 Securities - Partnership, LLC, or trust interests				
12 Securities - Miscellaneous				
13 Qualified conservation contribution - Historic structures				
14 Qualified conservation contribution - Other.				
15 Real estate - Residential				
16 Real estate - Commercial.				
17 Real estate - Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy.				
22 Historical artifacts.				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ▶()				
26 Other ▶()				
27 Other ▶()				
28 Other ▶()				

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?		X
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?	X	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?	X	
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.		

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule M (Form 990) 2019

JSA

9E1298 1.000

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.

FORM 990, SCHEDULE M, PART I, LINE 9

THE SOCIETY RECEIVES DONATED SECURITIES WHICH IN TURN ARE CONVERTED TO
CASH PROCEEDS FROM SALES OF DONATED SECURITIES THROUGH AN UNRELATED
INTERMEDIARY ORGANIZATION.

**SCHEDULE O
(Form 990 or 990-EZ)**

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2019

**Open to Public
Inspection**

Name of the organization

AMERICAN JEWISH HISTORICAL SOCIETY

Employer identification number

13-1764804

FORM 990, PART VI, SECTION B, LINE 11B

REVIEW OF FORM 990: THE DRAFT FORM 990 IS REVIEWED BY THE SOCIETY'S
MANAGEMENT, THEN BY THE SOCIETY'S FINANCE COMMITTEE, AND THEN PROVIDED TO
ALL MEMBERS OF THE BOARD OF TRUSTEES BEFORE BEING ELECTRONICALLY FILED
WITH THE INTERNAL REVENUE SERVICE.

FORM 990, PART VI, SECTION B, LINE 12C

CONFLICT OF INTEREST POLICY: THE ORGANIZATION HAS A CONFLICT OF INTEREST
POLICY AND MONITORS AND REVIEWS THE POLICY ANNUALLY.

FORM 990, PART VI, SECTION B, LINE 15A AND B

EXECUTIVE AND OTHER MANAGEMENT COMPENSATION: EXECUTIVE COMPENSATION IS
DETERMINED BY THE EXECUTIVE COMMITTEE OF THE BOARD OF TRUSTEES.
COMPENSATION OF OTHER EMPLOYEES IS DETERMINED BY THE EXECUTIVE DIRECTOR
AND IS SUBJECT TO BOARD APPROVAL.

FORM 990, PART VI, SECTION C, LINE 18 AND 19

AVAILABILITY OF FORMS AND GOVERNING DOCUMENTS: THE AFOREMENTIONED
DOCUMENTS AND FORMS ARE AVAILABLE UPON REQUEST.

ATTACHMENT 1

FORM 990, PART III, LINE 1 - ORGANIZATION'S MISSION

THE AMERICAN JEWISH HISTORICAL SOCIETY IS THE OLDEST ETHNIC, CULTURAL
ARCHIVE IN THE UNITED STATES. AJHS PROVIDES ACCESS TO MORE THAN 25
MILLION DOCUMENTS AND 50,000 BOOKS, PHOTOGRAPHS, ART AND ARTIFACTS

Name of the organization AMERICAN JEWISH HISTORICAL SOCIETY	Employer identification number 13-1764804
--	--

ATTACHMENT 1 (CONT'D)

FORM 990, PART III, LINE 1 - ORGANIZATION'S MISSION

THAT REFLECT THE HISTORY OF THE JEWISH PRESENCE IN THE UNITED STATES FROM 1654 TO THE PRESENT. AT OUR HOME ON WEST 16TH STREET IN DOWNTOWN MANHATTAN, AJHS ILLUMINATES AMERICAN JEWISH HISTORY THROUGH OUR MANY ARCHIVAL TREASURES, SCHOLARSHIP, EXHIBITIONS AND PUBLIC PROGRAMS. AMONG THE TREASURES OF THIS HERITAGE ARE THE HANDWRITTEN ORIGINAL OF EMMA LAZARUS' THE NEW COLOSSUS, WHICH GRACES THE STATUE OF LIBERTY; RECORDS OF THE NATION'S LEADING JEWISH COMMUNAL ORGANIZATIONS; AND IMPORTANT COLLECTIONS IN THE FIELDS OF EDUCATION, PHILANTHROPY, SCIENCE, SPORTS, BUSINESS AND THE ARTS. AJHS IS THE FUTURE OF THE AMERICAN JEWISH PAST.

ATTACHMENT 2

FORM 990, PART III - PROGRAM SERVICE, LINE 4B

PUBLIC PROGRAMS - PROGRAMMING AND EXHIBITIONS RELATING AND CONTRIBUTING TO AJHS'S ESTABLISHED ARCHIVAL COLLECTION ON AMERICAN JEWRY TOOK PLACE THROUGHOUT THE YEAR. THEY INCLUDED FILM SCREENINGS, PANEL DISCUSSIONS, POETRY READINGS, MUSIC PROGRAMS, BOOK TALKS AND MORE. IN 2019 AJHS CURATED THE EXHIBIT REWIND: VOICES OF THE PAST ADVISING THE FUTURE AN EXHIBITION EXPLORING THE UNITED JEWISH APPEAL-FEDERATION ORAL HISTORY COLLECTION. IN 2019, AJHS HOSTED A SERIES OF EVENTS ENTITLED NOT JUST FUNNY GIRL: JEWISH AMERICAN WOMEN IN COMEDY. THIS SERIES INCLUDED A FILM SCREENING OF "LOVE, GILDA: THE ETERNAL SPIRIT OF GILDA RADNER" AND "FROM JEAN CARROLL TO MRS. MAISEL: JEWISH WOMEN COMEDIANS AS AN INSPIRATION," A PANEL DISCUSSION WITH NOAF GARDENSWARZ, WRITER FOR

Name of the organization AMERICAN JEWISH HISTORICAL SOCIETY	Employer identification number 13-1764804
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ATTACHMENT 2 (CONT'D)

THE MARVELOUS MRS. MAISEL, AND GRACE OVERBEKE, DRAMATURG CURRENTLY
AT NORTHWESTERN UNIVERSITY.

ATTACHMENT 3FORM 990, PART III, LINE 4D - OTHER PROGRAM SERVICES

<u>DESCRIPTION</u>	<u>GRANTS</u>	<u>EXPENSES</u>	<u>REVENUE</u>
EXHIBITS		469,068.	
TOTALS		<u>469,068.</u>	

ATTACHMENT 4FORM 990, PART IX - OTHER FEES

<u>DESCRIPTION</u>	(A) <u>TOTAL FEES</u>	(B) <u>PROGRAM SERVICE EXP.</u>	(C) <u>MANAGEMENT AND GENERAL</u>	(D) <u>FUNDRAISING EXPENSES</u>
DESIGN DEVELOPMENT	269,388.	222,691.	8,911.	37,786.
TOTALS	<u>269,388.</u>	<u>222,691.</u>	<u>8,911.</u>	<u>37,786.</u>

SCHEDULER R

(Form 990)

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
2019
Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Name of the organization

AMERICAN JEWISH HISTORICAL SOCIETY

Employer identification number

13-1764804

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)						
(2)						
(3)						
(4)						
(5)						
(6)						

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)	CENTER FOR JEWISH HISTORY, INC. 15 WEST 16TH STREET NEW YORK, NY 10011 13-3863344	REPOSITORY	NY	501 (C) (3)	7	N/A		X
(2)								
(3)								
(4)								
(5)								
(6)								
(7)								

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule R (Form 990) 2019

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.

(1)	(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?		(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	
(1)								Yes	No		Yes	No	
(2)													
(3)													
(4)													
(5)													
(6)													
(7)													

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.

(1)	(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	No
(1)									Yes	No
(2)										
(3)										
(4)										
(5)										
(6)										
(7)										

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 organization 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	X
b	Gift, grant, or capital contribution to related organization(s).	1b	X
c	Gift, grant, or capital contribution from related organization(s).	1c	X
d	Loans or loan guarantees to or for related organization(s).	1d	X
e	Loans or loan guarantees by related organization(s).	1e	X
f	Dividends from related organization(s).	1f	
g	Sale of assets to related organization(s).	1g	X
h	Purchase of assets from related organization(s).	1h	X
i	Exchange of assets with related organization(s).	1i	X
j	Lease of facilities, equipment, or other assets to related organization(s).	1j	X
k	Lease of facilities, equipment, or other assets from related organization(s).	1k	X
l	Performance of services or membership or fundraising solicitations for related organization(s).	1l	X
m	Performance of services or membership or fundraising solicitations by related organization(s).	1m	X
n	Sharing of facilities, equipment, mailing lists, or other assets with related organization(s).	1n	X
o	Sharing of paid employees with related organization(s).	1o	X
p	Reimbursement paid to related organization(s) for expenses.	1p	X
q	Reimbursement paid by related organization(s) for expenses.	1q	X
r	Other transfer of cash or property to related organization(s).	1r	X
s	Other transfer of cash or property from related organization(s).	1s	X

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)				
(2)				
(3)				
(4)				
(5)				
(6)				

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	
(1)														
(2)														
(3)														
(4)														
(5)														
(6)														
(7)														
(8)														
(9)														
(10)														
(11)														
(12)														
(13)														
(14)														
(15)														
(16)														

Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R. See instructions.

ADDITIONAL RELATED PARTY INFORMATION:

IN OCTOBER 1995, THE SOCIETY, ALONG WITH THREE OTHER NOT-FOR-PROFIT ORGANIZATIONS, THE LEO BAECK INSTITUTE, INC., THE YIVO INSTITUTE FOR JEWISH RESEARCH, INC., AND THE YESHIVA UNIVERSITY MUSEUM SIGNED AN AGREEMENT FORMING THE CENTER FOR JEWISH HISTORY, INC. (THE "CENTER"), A SEPARATE, 501(C)(3) NOT-FOR-PROFIT CORPORATION. THEREAFTER, THE AMERICAN SEPHARDI FEDERATION ENTERED INTO A SUPPLEMENTAL AGREEMENT WITH THE INITIAL MEMBERS WHICH PROVIDED FOR ITS MEMBERSHIP INTO THE CENTER. UPON LIQUIDATION OF THE CENTER, MEMBER ORGANIZATIONS WOULD BE ENTITLED TO RECEIVE A SHARE OF THE PROCEEDS OF THE LIQUIDATION, SUBJECT TO CERTAIN SENIOR CLAIMS. LIQUIDATION OF THE CENTER REQUIRES THE CONSENT OF ALL MEMBER ORGANIZATIONS.

THE CENTER PROVIDES FOR THE OPERATION OF THE SOCIETY'S OPERATING FACILITY, INCLUDING (I) MAINTENANCE OF ALL OFFICES AND SPECIALIZED AREAS; (II) CONTROL OF THE MECHANICAL SYSTEMS FOR THE BUILDING; (III) MAINTENANCE OF ELEVATORS; (IV) SUPPORT FOR ALL TECHNOLOGY; (V) SECURITY; AND (VI) MANY OTHER RELATED SERVICES. THE CENTER ALSO SERVES AS THE CENTRAL REPOSITORY FOR THE SOCIETY'S ARCHIVAL DOCUMENTS, BOOKS, PHOTOGRAPHS, PAINTINGS, AND ARTIFACTS. ALTHOUGH THE CENTER DERIVES ITS REVENUE FROM SOURCES TYPICAL OF NOT-FOR-PROFIT ENTERPRISES, REVENUES GENERATED BY THE CENTER ARE NOT SUFFICIENT TO COVER ITS OPERATING EXPENSES. FOR THE YEARS 2019 AND 2018, THE SOCIETY AND OTHER MEMBERS AGREED TO CONTRIBUTE AN AGGREGATE AMOUNT OF \$1,200,000 EACH YEAR, TO COVER THE CENTER'S OPERATING COSTS. THE AMOUNT CONTRIBUTED BY EACH MEMBER IS BASED UPON THE MEMBER'S ALLOCATED SPACE AT THE CENTER.

Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R. See instructions.

IN ADDITION TO THE FACILITY SERVICES AGREEMENT, DURING 2014, THE SOCIETY AND THE CENTER ENTERED INTO AN AGREEMENT WHEREBY THE CENTER WOULD PROVIDE ACCOUNTING AND OTHER ADMINISTRATIVE FUNCTIONS TO THE SOCIETY. HOWEVER, FOR 2017 AND THEREAFTER, THE SOCIETY AMENDED THIS RELATIONSHIP WITH THE CENTER, WHICH WILL NO LONGER HANDLE THE BULK OF THE ACCOUNTING SERVICES FOR THE SOCIETY; INSTEAD, THE SOCIETY WILL HANDLE ITS OWN ACCOUNTING FUNCTION. DURING 2019, THE SOCIETY CAME TO AN AGREEMENT WITH THE CENTER WHERE THE CENTER WOULD HANDLE THE BULK OF THE ACCOUNTING SERVICES FOR THE SOCIETY. DURING 2017, THE CENTER AND OTHER MEMBER ORGANIZATIONS ENTERED INTO AN AMENDED AGREEMENT THAT INCLUDED UPDATED BYLAWS AND OTHER GOVERNANCE RELATED MATTERS TO FURTHER ENHANCE AND STRENGTHEN THE COLLABORATION AMONG THE FIVE MEMBER ORGANIZATIONS.

IN RELATION TO ITS AGREEMENTS WITH THE CENTER, THE SOCIETY INCURRED OPERATING EXPENSES OF \$245,460 AND \$233,772 FOR 2019 AND 2018, RESPECTIVELY. AMOUNTS DUE TO THE CENTER WERE \$16,437 AND \$15,158 AS OF DECEMBER 31, 2019 AND 2018, RESPECTIVELY, AND ARE INCLUDED IN ACCOUNTS PAYABLE AND ACCRUED EXPENSES IN THE ACCOMPANYING STATEMENTS OF FINANCIAL POSITION.