Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0047

2021

Open to Public Inspection

For calendar year 2021, or tax year beginning 10-01-2021 , and ending 09-30-2022

Name of foundation
SHIFT FKA Aaron & Martha Schecter
Private Foundation

A Employer identification number
59-2185762

Number and street (or P.O. box number if mail is not delivered to street address)
3900 Hollywood Blvd PH-N PH-N

Room/suite

B Telephone number (see instructions)
(954) 923-6778

City or town, state or province, country, and ZIP or foreign postal code
Hollywood, FL 33021

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

D 1. Foreign organizations, check here............ ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ... ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here .... ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), *line 16)* ▶$ 5,344,859

J Accounting method: ☑ Cash ☐ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here .... ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)*

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	13	13		
	4	Dividends and interest from securities . . .	133,807	133,807		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	633,077			
	b	Gross sales price for all assets on line 6a 2,289,094				
	7	Capital gain net income (from Part IV, line 2) . . .		633,077		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	766,897	766,897		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	4,551	4,551		0
	c	Other professional fees (attach schedule)	86,923	0		86,923
	17	Interest				
	18	Taxes (attach schedule) (see instructions) . . .	607	607		0
	19	Depreciation (attach schedule) and depletion . . .				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	25,642	25,642		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	117,723	30,800		86,923
	25	Contributions, gifts, grants paid	1,311,742			1,311,742
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,429,465	30,800		1,398,665
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-662,568			
	b	**Net investment income** (if negative, enter -0-)		736,097		
	c	**Adjusted net income** (if negative, enter -0-) . . .				

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

			Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	2	4,528	4,528
	2	Savings and temporary cash investments	302,109	239,732	239,732
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule)	429,504	254,589	183,548
	b	Investments—corporate stock (attach schedule)	2,804,830	2,461,366	4,114,455
	c	Investments—corporate bonds (attach schedule)	937,433	851,095	802,596
	11	Investments—land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	4,473,878	3,811,310	5,344,859
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**Foundations that follow FASB ASC 958, check here** ▶ ☐ **and complete lines 24, 25, 29 and 30.**			
	24	Net assets without donor restrictions			
	25	Net assets with donor restrictions			
		Foundations that do not follow FASB ASC 958, check here ▶ ☑ **and complete lines 26 through 30.**			
	26	Capital stock, trust principal, or current funds	0	0	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28	Retained earnings, accumulated income, endowment, or other funds	4,473,878	3,811,310	
	29	**Total net assets or fund balances** (see instructions)	4,473,878	3,811,310	
	30	**Total liabilities and net assets/fund balances** (see instructions)	4,473,878	3,811,310	

Part III **Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	4,473,878
2	Enter amount from Part I, line 27a	2	-662,568
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	3,811,310
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	3,811,310

Part IV **Capital Gains and Losses for Tax on Investment Income**

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a	ADOBE INC			
b	AGILENT TECHNOLOGIES INC			
c	AIR PRODUCTS CHEMICALS INC			
d	APPLIED MATERIALS INC			
e	APTAR GROUP INC			
	BECTON DICKINSON			
	BOSTON TRUST WALDEN			
	BOSTON TRUST WALDEN			
	CHURCH AND DWIGHT			
	COMCAST CORP			
	DEERE			
	DOLLAR GENERAL CORP			
	EAST WEST BANCORP INC			
	EAST WEST BANCORP INC			
	ELECTRONIC ARTS INC			
	EMBECTA CORP			
	JOHNSON JOHNSON			
	KIMBERLY CLARK			
	LOWES CO			
	MARSH MCLENNAN			
	MASCO CORP			
	PAYPAL HOLDINGS INC			
	PEPSICO INC			
	ROSS STORES			
	UNION PACIFIC CORP			
	UNITED PARCEL SERVICE			
	UNITED HEALTH GROUP			
	VANGUARD ESG INTERNATIONAL			
	WATERS CORP			
	AIR PRODUCTS CHEMICALS INC			
	ALPHABET INC			
	AMERICAN EXPRESS CO			
	AMGEN INC			
	ANALOG DEVICES INC			
	APPLE INC			
	APPLE INC			
	AUTOMATIC DATA PROCESSING			
	AUTOZONE INC			
	BANK OF NY MTN			
	BOSTON TRUST WALDEN			
	BOSTON TRUST WALDEN			
	CALVERT SOCIAL MTN			
	CERNER CORPORATION			
	CISCO SYSTEMS INC			
	COMCAST CORP			
	COOPER COS			
	COSTCO WHSL			
	CUMMINS INC			
	DEERE COMPANY			
	DISNEY WALT CO			
	DOLLAR GENERAL CORP			
	DONALDSON CO			
	EBAY INC			
	EMBECTA CORP			
	FACTSET RESEARCH SYSTEMS			
	GNMA			
	HOME DEPOT			
	HUBBELL INC			
	INTEL CORP			
	INTUIT CORP			
	INTUITIVE SURGICAL			
	JP MORGAN CHASE			
	LAUDER ESTEE			
	LINCOLN ELEC HLDGS INC			
	MARSH MCLENNAN			
	MCDONALDS CORP			
	MERCK AND CO INC			
	MICROSOT CORP			
	MOODYS CORP			
	NIKE INC			
	NORTHERN TRUST CORP			
	ORACLE CORP			
	PNC FINANCIAL			
	PPG INDS			
	T ROWE PRICE GROUP			
	SCHEIN HENRY INC			
	STARBUCKS INC			
	STRYKER CORP			
	US BANCORP			
	UNION PACIFIC CORP			
	US TREASURY BD			
	UNITED HEALTH GROUP			
	VISA INC			
	ACCENTURE PLC CL A			
	MEDTRONIC PLC			
	CHUBB LTD			
	TE CONNECTIVITY			

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	7,206		12,165	-4,959
b	5,852		5,974	-122
c	14,218		14,978	-760
d	4,638		8,651	-4,013
e	7,189		8,341	-1,152
	12,401		12,290	111
	4,118		4,038	80
	16,235		15,939	296
	8,440		8,667	-227
	17,752		20,212	-2,460
	8,795		10,883	-2,088
	8,622		6,918	1,704
	8,861		8,320	541
	8,254		10,816	-2,562
	7,277		8,138	-861
	438		407	31
	18,613		18,469	144
	32,828		36,224	-3,396
	10,514		13,633	-3,119
	6,962		6,995	-33
	6,414		7,282	-868
	4,848		14,092	-9,244
	23,473		23,610	-137
	6,341		8,601	-2,260
	9,554		10,061	-507
	12,786		12,350	436
	19,255		19,688	-433
	30,690		30,964	-274
	11,617		11,204	413
	5,762		2,656	3,106
	75,273		13,927	61,346
	47,639		15,114	32,525
	55,758		61,826	-6,068
	6,983		5,788	1,195
	17,599		325	17,274
	43,362		1,023	42,339
	8,320		2,049	6,271
	20,251		7,818	12,433
	4			4
	25,883		19,648	6,235
	23,765		12,722	11,043
	250,000		250,000	0
	52,734		38,781	13,953
	7,792		3,296	4,496
	5,861		4,190	1,671
	6,222		7,075	-853
	60,062		11,470	48,592
	5,655		5,418	237
	100,000		100,000	0
	30,430		19,376	11,054
	2,463		751	1,712
	6,174		6,012	162
	3,569		5,354	-1,785
	1,751		493	1,258
	5,854		4,917	937
	8,760		8,941	-181
	77,674		35,998	41,676
	37,678		30,376	7,302
	36,611		39,192	-2,581
	78,650		44,019	34,631
	47,958		22,864	25,094
	22,696		23,843	-1,147
	5,042		1,927	3,115
	14,239		9,929	4,310
	4,641		3,397	1,244
	51,986		37,020	14,966
	11,976		9,555	2,421
	52,109		5,613	46,496
	26,712		27,215	-503
	24,171		4,177	19,994
	11,868		10,931	937
	85,922		19,867	66,055
	77,097		21,771	55,326
	43,786		35,774	8,012
	7,325		10,534	-3,209
	194			194
	7,370		5,328	2,042
	18,764		4,514	14,250
	11,587		12,500	-913
	7,431		2,671	4,760
	158,027		164,502	-6,475
	20,129		4,822	15,307
	19,552		20,944	-1,392
	45,380		8,303	37,077
	53,198		42,507	10,691
	10,664		8,774	1,890
	6,540		8,270	-1,730

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				-4,959
b				-122
c				-760
d				-4,013
e				-1,152
				111
				80
				296
				-227
				-2,460
				-2,088
				1,704
				541
				-2,562
				-861
				31
				144
				-3,396
				-3,119
				-33
				-868
				-9,244
				-137
				-2,260
				-507
				436
				-433
				-274
				413
				3,106
				61,346
				32,525
				-6,068
				1,195
				17,274
				42,339
				6,271
				12,433
				4
				6,235
				11,043
				0
				13,953
				4,496
				1,671
				-853
				48,592
				237
				0
				11,054
				1,712
				162
				-1,785
				1,258
				937
				-181
				41,676
				7,302
				-2,581
				34,631
				25,094
				-1,147
				3,115
				4,310
				1,244
				14,966
				2,421
				46,496
				-503
				19,994
				937
				66,055
				55,326
				8,012
				-3,209
				194
				2,042
				14,250
				-913
				4,760
				-6,475
				15,307
				-1,392
				37,077
				10,691
				1,890
				-1,730

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	633,077
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		3	

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

Line	Description		
1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Bracket for line 1a Date of ruling or determination letter: ________ (attach copy of letter if necessary–see instructions)		
b	All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	10,232
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	10,232
6	Credits/Payments:		
a	2021 estimated tax payments and 2020 overpayment credited to 2021	6a	9,383
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	11,617
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d	7	21,000
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	0
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	10,768
11	Enter the amount of line 10 to be: **Credited to 2022 estimated tax** ▶ 10,768 **Refunded** ▶	11	0

Part VI-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0 **(2)** On foundation managers. ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XIV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ FL			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2021 or the taxable year beginning in 2021? See the instructions for Part XIII. If "Yes," complete Part XIII	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VI-A Statements Regarding Activities (continued)

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶Koffler Adorno and Associates LLC Telephone no. ▶(954) 983-7133

Located at ▶3900 Hollywood BLVD PH-N Hollywood FL ZIP+4 ▶33021

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

			Yes	No
16	At any time during calendar year 2021, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)		No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)		No
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)		No
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)		No
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		
c	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
d	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2021?	1d		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2021, did the foundation have any undistributed income (lines 6d and 6e, Part XII) for tax year(s) beginning before 2021?	2a		No
	If "Yes," list the years ▶ 20___, 20___, 20___, 20___			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20___, 20___, 20___, 20___			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a		No
b	If "Yes," did it have excess business holdings in 2021 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2021.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2021?	4b		No

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

			Yes	No
5a	During the year did the foundation pay or incur any amount to:			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	5a(1)		No
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)		No
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)		No
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	5a(4)		No
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	5a(5)		No
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		
c	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
d	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? *If "Yes," attach the statement required by Regulations section 53.4945–5(d).*	5d		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	6a		No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? *If "Yes" to 6b, file Form 8870.*	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	7a		No
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment during the year?	8		No

Part VII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
LAURIE SCHECTER 4500 NORTH SURF ROAD HOLLYWOOD, FL 33019	TRUSTEE 0.00	0	0	0
JULIE SCHECTER 72 WEST BERLIN ROAD BOLTON, MA 01776	TRUSTEE 0.00	0	0	0
WILL HAPGOOD 72 WEST BERLIN ROAD BOLTON, MA 01776	TRUSTEE 0.00	0	0	0

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

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

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

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

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

Part VIII- Summary of Direct Charitable Activities

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

Part VIII- Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 . . . . ▶	0

Part IX Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	4,267,936
b	Average of monthly cash balances	1b	264,798
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	4,532,734
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	4,532,734
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	67,991
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3.	5	4,464,743
6	**Minimum investment return.** Enter 5% (0.05) of line 5	6	223,237

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

1	Minimum investment return from Part IX, line 6	1	223,237
2a	Tax on investment income for 2021 from Part V, line 5 — 2a: 10,232		
b	Income tax for 2021. (This does not include the tax from Part V.) — 2b:		
c	Add lines 2a and 2b	2c	10,232
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	213,005
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	213,005
6	Deduction from distributable amount (see instructions)	6	0
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1	7	213,005

Part XI Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	
b	Program-related investments—total from Part VIII-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part XII, line 4.	4	

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

	(a) Corpus	(b) Years prior to 2020	(c) 2020	(d) 2021
1 Distributable amount for 2021 from Part X, line 7				213,005
2 Undistributed income, if any, as of the end of 2021:				
a Enter amount for 2020 only.			0	
b Total for prior years: 20___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2021:				
a From 2016. 1,469,550				
b From 2017. 1,081,382				
c From 2018. 1,120,401				
d From 2019. 963,935				
e From 2020. 542,680				
f **Total** of lines 3a through e	5,177,948			
4 Qualifying distributions for 2021 from Part XI, line 4: ▶ $ 1,398,665				
a Applied to 2020, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2021 distributable amount				213,005
e Remaining amount distributed out of corpus	1,185,660			
5 Excess distributions carryover applied to 2021. *(If an amount appears in column (d), the same amount must be shown in column (a).)*	0			0
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	6,363,608			
b Prior years' undistributed income. Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount —see instructions		0		
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2022				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0			
8 Excess distributions carryover from 2016 not applied on line 5 or line 7 (see instructions) . . .	1,469,550			
9 **Excess distributions carryover to 2022.** Subtract lines 7 and 8 from line 6a	4,894,058			
10 Analysis of line 9:				
a Excess from 2017 1,081,382				
b Excess from 2018 1,120,401				
c Excess from 2019. . . . 963,935				
d Excess from 2020 542,680				
e Excess from 2021 1,185,660				

Part XIII **Private Operating Foundations** (see instructions and Part VI-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2021, enter the date of the ruling

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

	Tax year	Prior 3 years			(e) Total
	(a) 2021	**(b)** 2020	**(c)** 2019	**(d)** 2018	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: **a** "Assets" alternative test—enter: **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed					
c "Support" alternative test—enter: **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

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

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

a The name, address, and telephone number or email address of the person to whom applications should be addressed:

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ACLU Foundation 125 Broad Street 18th Floor New York, NY 10004		PUBLIC	UNRESTRICTED DONATION	50,000
ACLU of Florida 4500 Biscayne Blvd Ste 340 Miami, FL 33137		PUBLIC	UNRESTRICTED DONATION	60,000
Boston University - AntiRacist Research PO Box 22605 New York, NY 10087		PUBLIC	UNRESTRICTED DONATION	150,000
Curious Communications Inc PO Box 1565 New York, NY 10013		PUBLIC	UNRESTRICTED DONATION	100,000
Democracy Collaboriative 1422 Euclid Avenue Ste 616 Cleveland, OH 44115		PUBLIC	UNRESTRICTED DONATION	425,000
Evolution Institute Inc 10627 Machrihanish Circle San Antonio, FL 33576		PUBLIC	UNRESTRICTED DONATION	74,750
Sustainable Economies Law Center 436 14th Street Ste 1120 Oakland, CA 94612		PUBLIC	UNRESTRICTED DONATION	350,000
Tides Center 1014 Torney Avenue San Francisco, CA 94129		PUBLIC	UNRESTRICTED DONATION	2,080
Common Counsel Foundation 1624 Franklin Street 1022 Oakland, CA 94612		PUBLIC	UNRESTRICTED DONATION	75,000
Beyond the Bars 1951 NW 7th Ave 300 Miami, FL 33136		PUBLIC	UNRESTRICTED DONATION	10,000
New Venture Fund PO Box 37734 Baltimore, MD 21297		PUBLIC	UNRESTRICTED DONATION	14,912
Total . . . . . . ▶ **3a**				1,311,742
b *Approved for future payment*				
Total . . . . . . ▶ **3b**				0

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions.)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	13	
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate:					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	633,077	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e) . .		0		766,897	0

13 **Total.** Add line 12, columns (b), (d), and (e). 13 766,897

(See worksheet in line 13 instructions to verify calculations.)

Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash.	**1a(1)**		**No**
(2) Other assets.	**1a(2)**		**No**
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization.	**1b(1)**		**No**
(2) Purchases of assets from a noncharitable exempt organization	**1b(2)**		**No**
(3) Rental of facilities, equipment, or other assets.	**1b(3)**		**No**
(4) Reimbursement arrangements.	**1b(4)**		**No**
(5) Loans or loan guarantees.	**1b(5)**		**No**
(6) Performance of services or membership or fundraising solicitations.	**1b(6)**		**No**
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	**1c**		**No**

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line No.	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule.

(a) Name of organization	**(b)** Type of organization	**(c)** Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee | 2023-08-10 Date | Title

May the IRS discuss this return with the preparer shown below? See instructions. ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
Mark J Adorno CPA				P00447213
Firm's name ▶ Koffler Adorno & Associates LLC				Firm's EIN ▶20-0644948
Firm's address ▶ 3900 Hollywood Blvd PH-N Hollywood, FL 33021				Phone no. (954) 983-7133

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2021 IRS 990 e-File Render

Name: SHIFT FKA Aaron & Martha Schecter Private Foundation

EIN: 59-2185762

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	4,551	4,551		0

TY 2021 IRS 990 e-File Render

Name: SHIFT FKA Aaron & Martha Schecter Private Foundation

EIN: 59-2185762

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Coporate Bond - Various	851,095	802,596

TY 2021 IRS 990 e-File Render

Name: SHIFT FKA Aaron & Martha Schecter Private Foundation

EIN: 59-2185762

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Coporate Stock - Various	2,461,366	4,114,455

TY 2021 IRS 990 e-File Render

Name:	SHIFT FKA Aaron & Martha Schecter Private Foundation
EIN:	59-2185762
US Government Securities - End of Year Book Value:	254,589
US Government Securities - End of Year Fair Market Value:	183,548
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2021 IRS 990 e-File Render

Name: SHIFT FKA Aaron & Martha Schecter Private Foundation

EIN: 59-2185762

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Fees	25,602	25,602		0
Bank Charges	40	40		0

TY 2021 IRS 990 e-File Render

Name: SHIFT FKA Aaron & Martha Schecter Private Foundation

EIN: 59-2185762

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Convening Expenses	86,923	0		86,923

TY 2021 IRS 990 e-File Render

Name: SHIFT FKA Aaron & Martha Schecter Private Foundation

EIN: 59-2185762

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foreign Tax	607	607		0