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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052

2011

For calendar year 2011, or tax year beginning 01-01-2011 , and ending 12-31-2011

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Name of foundation
BLUE MOUNTAIN FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)
1330 BROADCASTING ROAD

City or town, state, and ZIP code
WYOMISSING, PA 19610

A Employer identification number
23-2586321

B Telephone number (see page 10 of the instructions)
(610) 376-1595

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐

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

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

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

H Check type of organization

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)
\$ 724,847

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

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 page 11 of the instructions))		(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	6,890	6,890		
	4 Dividends and interest from securities.	10,581	10,581		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	23,485			
	b Gross sales price for all assets on line 6a _____ 180,906				
	7 Capital gain net income (from Part IV, line 2)		23,485		
	8 Net short-term capital gain				
	9 Income modifications			1,000	
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	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	40,956	40,956	1,000	
	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).	7,750	3,875		3,875
	c Other professional fees (attach schedule)	2,597	1,299		1,298
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule).	462	462		0
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	10,809	5,636		5,173
	25 Contributions, gifts, grants paid.	33,630			33,630
	26 Total expenses and disbursements. Add lines 24 and 25	44,439	5,636		38,803
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-3,483			
	b Net investment income (if negative, enter -0-)		35,320		
	c Adjusted net income (if negative, enter -0-)			1,000	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

Cat No 11289X

Form **990-PF** (2011)

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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	32,199	21,814	21,814
	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 page 15 of the 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)	112,872	 92,178	101,523
	b	Investments—corporate stock (attach schedule)	401,922	 410,306	495,438
	c	Investments—corporate bonds (attach schedule).	75,734	 95,946	106,072
	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)	622,727	620,244	724,847

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 SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	622,727	620,244	
	30	Total net assets or fund balances (see page 17 of the instructions)	622,727	620,244	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	622,727	620,244	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	622,727
2	Enter amount from Part I, line 27a	2	-3,483
3	Other increases not included in line 2 (itemize) ▶ _____ 	3	1,000
4	Add lines 1, 2, and 3	4	620,244
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 30	6	620,244

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	VARIOUS SECURITIES	P		
b	LONG TERM CAPITAL GAIN DISTRIBUTIONS	P		
c	CLASS ACTION SETTLEMENT FUNDS	P		
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 179,752		157,421	22,331
b 1,121			1,121
c 33			33
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			22,331
b			1,121
c			33
d			
e			

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	23,485
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 pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

Part V

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010	87,127	731,164	0 119162
2009	44,548	682,673	0 065255
2008	41,049	754,128	0 054432
2007	3,058	813,461	0 003759
2006	74,919	668,958	0 111994

2	Total of line 1, column (d).	2	0 354602
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 070920
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5.	4	752,084
5	Multiply line 4 by line 3.	5	53,338
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	353
7	Add lines 5 and 6.	7	53,691
8	Enter qualifying distributions from Part XII, line 4.	8	38,803

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	706
c		All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% 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	706
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	706
6		Credits/Payments			
a		2011 estimated tax payments and 2010 overpayment credited to 2011	6a	640	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c	400	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments. Add lines 6a through 6d.		7	1,040
8		Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	
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	334
11		Enter the amount of line 10 to be Credited to 2012 estimated tax ☐ 334	Refunded ☐	11	0

Part VII-AStatements Regarding Activities

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?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			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 XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ☐ PA			
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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	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 VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of REINSEL KUNTZ LESHER LLP Telephone no (610) 376-1595 Located at 1330 BROADCASTING ROAD WYOMISSING PA ZIP +4 19610			
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		
16	At any time during calendar year 2011, 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	Yes	No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
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? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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)? ☐ Yes ☒ 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). ☐ Yes ☒ 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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here. ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	1c		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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? ☐ Yes ☒ 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 page 20 of the 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? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2011 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.</i>)	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 2011?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).	☐ Yes ☒ No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	☐	5b	
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>	☐ Yes ☐ No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>		6b	No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the 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
ANNE O MOLL 1330 BROADCASTING ROAD WYOMISSING, PA 19610	PRESIDENT 1 00	0	0	0
THOMAS MOLL 1330 BROADCASTING ROAD WYOMISSING, PA 19610	VICE PRES 1 00	0	0	0
THOMAS A BEAVER 1330 BROADCASTING ROAD WYOMISSING, PA 19610	SECRETARY - TREASURER 1 00	0	0	0
HAL LAVIN 1330 BROADCASTING ROAD WYOMISSING, PA 19610	ASSISTANT SECRETARY 1 00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the 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 VIII

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

3 Five highest-paid independent contractors for professional services (see page 23 of the 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 IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see page 23 of the 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 page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	0

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	725,688
b	Average of monthly cash balances.	1b	37,849
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	763,537
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	763,537
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	11,453
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	752,084
6	Minimum investment return. Enter 5% of line 5.	6	37,604

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	37,604
2a	Tax on investment income for 2011 from Part VI, line 5.	2a	706
b	Income tax for 2011 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	706
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	36,898
4	Recoveries of amounts treated as qualifying distributions.	4	1,000
5	Add lines 3 and 4.	5	37,898
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	37,898

Part XII

Qualifying Distributions (see page 25 of the 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	38,803
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	38,803
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	38,803
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				37,898
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2011				
a From 2006.				
b From 2007.				
c From 2008.				
d From 2009.				
e From 2010.				37,274
f Total of lines 3a through e.	37,274			
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 38,803				
a Applied to 2010, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d Applied to 2011 distributable amount.				37,898
e Remaining amount distributed out of corpus	905			
5 Excess distributions carryover applied to 2011 (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	38,179			
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 page 27 of the instructions . . .		0		
e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).	0			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the instructions).	0			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	38,179			
10 Analysis of line 9				
a Excess from 2007. . . .				
b Excess from 2008. . . .				
c Excess from 2009. . . .				
d Excess from 2010. . . .				37,274
e Excess from 2011. . . .				905

Part XIV

Private Operating Foundations (see page 27 of the instructions and Part VII-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 2011, 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)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a

Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.

Tax year	Prior 3 years				(e) Total
(a) 2011	(b) 2010	(c) 2009	(d) 2008		
b 85% of line 2a					
c Qualifying distributions from Part XII, 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 X, 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 XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the 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. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

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

THOMAS A BEAVER CPA
1330 BROADCASTING ROAD
WYOMISSING, PA 196106008
(610) 373-1565

b

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

WRITTEN

c

Any submission deadlines

NONE

d

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

AT MANAGERS DISCRETION

Form 990-PF (2011)

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	33,630
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2011)

Part XVII

1

(a)

2.

1

4.

Additional Data

Software ID:
Software Version:
EIN: 23-2586321
Name: BLUE MOUNTAIN FOUNDATION

Form 990PF - Special Condition Description:

Special Condition Description

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ALBRIGHT COLLEGE13TH BERN STREETS READING,PA 196125234	NONE	PUBLIC	GENERAL FUND	1,500
AMERICAN RED CROSS701 CENTRE AVENUE READING,PA 19601	NONE	PUBLIC	GENERAL FUND	1,500
ANOTHER CHANCE FOR HORSES 166 STATION ROAD BERNVILLE,PA 19506	NONE	PUBLIC	GENERAL FUND	1,000
BERKS COUNTY ASSOCIATION FOR THE BLIND2020 HAMPDEN BLVD READING,PA 19604	NONE	PUBLIC	GENERAL FUND	1,000
BERKS DEAF AND HARD OF HEARING SERVICES2045 CENTRE AVENUE READING,PA 19605	NONE	PUBLIC	GENERAL FUND	1,000
BERKS ENCORE40 NORTH NINTH STREET READING,PA 19601	NONE	PUBLIC	GENERAL FUND	1,000
BERKS TALKLINEPO BOX 13234 READING,PA 196123234	NONE	PUBLIC	GENERAL FUND	1,500
BERKS WOMEN IN CRISIS50 N 4TH STREET SUITE 101 READING,PA 19601	NONE	PUBLIC	GENERAL FUND	1,000
CO COUNTY WELLNESS SERVICES 429 WALNUT STREET READING,PA 196038626	NONE	PUBLIC	GENERAL FUND	6,130
EASY DOES IT INC1300 HILLTOP ROAD LEESPORT,PA 19533	NONE	PUBLIC	GENERAL FUND	1,000
HAWK MOUNTAIN COUNCIL BSA 5027 POTTSVILLE PIKE READING,PA 19605	NONE	PUBLIC	GENERAL FUND	1,000
JOHN PAUL II CENTER FOR SPECIAL LEARNING1092 WELSH ROAD READING,PA 19607	NONE	PUBLIC	GENERAL FUND	1,000
LITERACY COUNCIL OF READING-BERKS35 S DWIGHT STREET READING,PA 19609	NONE	PUBLIC	GENERAL FUND	500
OLIVET BOYS AND GIRLS CLUB OF READING & BERKS COUNTY1161 PERSHING BLVD READING,PA 19611	NONE	PUBLIC	GENERAL FUND	1,500
OPPORTUNITY HOUSE430 N 2ND STREET READING,PA 19601	NONE	PUBLIC	GENERAL FUND	1,000
PLANNED PARENTHOOD OF THE NORTHEAST AND MID-PENN48 S 4TH STREET READING,PA 19602	NONE	PUBLIC	GENERAL FUND	1,000
POP CORN PARK REFUGEPO BOX 43 FORKED RIVER,NJ 087310043	NONE	PUBLIC	GENERAL FUND	1,500
READING MUSICAL FOUNDATION PO BOX 14835 READING,PA 196124835	NONE	PUBLIC	GENERAL FUND	500
SALVATION ARMY301 S 5TH STREET READING,PA 19602	NONE	PUBLIC	GENERAL FUND	2,000
SOUTH MOUNTAIN CAMPS FOUNDATIONPO BOX 147 WERNERSVILLE,PA 19565	NONE	PUBLIC	GENERAL FUND	1,000
ST JOSEPH'S MEDICAL CENTER FOUNDATIONPO BOX 316 READING,PA 196030316	NONE	PUBLIC	GENERAL FUND	1,000
TEEN CHALLENGE TRAINING CENTER INCPO BOX 98 REHRERSBURG,PA 19550	NONE	PUBLIC	GENERAL FUND	1,000
THE GREATER BERKS FOOD BANK 1011 TUCKERTON COURT READING,PA 19605	NONE	PUBLIC	GENERAL FUND	2,000
UNITED WAY OF BERKS COUNTY 501 WASHINGTON STREET READING,PA 196030702	NONE	PUBLIC	GENERAL FUND	1,000
WYOMISSING PUBLIC LIBRARY9 READING BOULEVARD WYOMISSING,PA 19610	NONE	PUBLIC	GENERAL FUND	1,000
Total  3a				33,630

TY 2011 Accounting Fees Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REINSEL KUNTZ LESHER -TAX SERVICE	7,750	3,875		3,875

TY 2011 Investments Corporate Bonds Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Name of Bond	End of Year Book Value	End of Year Fair Market Value
5,000 UNITS IBM	5,173	6,054
15,000 UNITS SBC COMMUNICATIONS	14,164	17,208
5,000 UNITS GLAXOSMITH CAP	5,124	6,018
5,000 UNITS WAL-MART	5,248	5,901
5,000 UNITS CONSOLIDATED EDISON	5,167	6,100
5,000 UNITS COSTCO	5,168	5,972
5,000 UNITS GENERAL ELECTRIC CO	5,121	5,211
5,000 UNITS ALLSTATE LIFE	5,076	5,280
5,000 UNITS JP MORGAN CHASE & CO	5,339	5,862
5,000 UNITS ORACLE	5,227	5,377
5,000 UNITS WELLS FARGO COMPANY	4,990	5,279
5,000 UNITS PEPSICO INC DTD 10/26/10 3.125% 11/01/2020	4,904	5,197
5,000 UNITS US BANCORP DTD 07/27/2010 2.45% 7/27/2015	5,033	5,124
5,000 SHS BANK OF NY MELLON BK DTD 9 23 21	5,064	5,072
5,000 SHS GENERAL ELECTRIC CAP CORP DTD 01 07 11 4.625%	5,221	5,187
5,000 UNITS MERCK & CO INC DTD 12 10 10 3.875%	4,909	5,629
5,000 UNITS OCCIDENTAL PETROLEUM CORP	5,018	5,601

TY 2011 Investments Corporate
 Stock Schedule

Name: BLUE MOUNTAIN FOUNDATION
 EIN: 23-2586321

Name of Stock	End of Year Book Value	End of Year Fair Market Value
350 SHS A T & T	7,620	10,584
120 SHS EXXON MOBIL CORP	1,665	10,170
180 SHS JOHNSON & JOHNSON	8,628	11,803
409 SHS MICROSOFT CORP COM	10,463	10,617
65 SHS VF CORPORATION	2,494	8,254
190 SHS HEWLETT-PACKARD CO COM	3,482	4,894
1826.176 SHS CONESTOGA SMALL CAP	37,711	41,308
170 SHS AMGEN INC	9,648	10,916
110 SHS CHEVRON	8,491	11,704
125 SHS DANAHER CORP COM	3,535	5,880
205 SHS DARDEN RESTAURANTS INC	5,353	9,344
245 SHS MCGRAW HILL COS INC	8,552	11,018
320 SHS ORACLE CORP	5,765	8,208
100 SHS PEPSICO INC	5,932	6,635
310 SHS PFIZER INC	5,937	6,708
110 SHS QUALCOMM INC	4,318	6,017
130 SHS UNITED TECHNOLOGIES	7,353	9,502
25 SHS APPLE	2,330	10,125
250 SHS MCCORMICK & COMPANY INC	9,444	12,605
75 SHS AMETEK INC	1,741	3,158
40 SHS BMC SOFTWARE	1,031	1,311
35 SHS FACTSET RESEARCH	2,438	3,055
35 SHS HARRIS CORP	1,293	1,261
100 SHS HORMEL FOODS	1,695	2,929
35 SHS L-3 COMMUNICATIONS HOLDINGS COM	2,595	2,334
90 SHS ROSS STORES	1,420	4,278
15 SHS TECHNE CORP	985	1,024
35 SHS TORO CO	1,299	2,123
30 SHS TUPPERWARE	918	1,679
320 SHS WALGREEN CO	7,611	10,579

Name of Stock	End of Year Book Value	End of Year Fair Market Value
80 SHS BROADRIDGE FINL SOL	981	1,804
60 SHS LABORATORY CRP	3,756	5,158
20 SHS HUBBELL INC	642	1,337
240 SHS ALTERA CORPORATION	4,127	8,904
30 SHS COPART INC	897	1,437
62 SHS AEROPOSTALE INC	1,075	946
25 SHS PERRIGO CO COM	564	2,433
65 SHS INTERNATIONAL BUS MACHS CORP	6,660	11,952
25 SHS WESTERN DIGITAL CORP	606	774
80 SHS C H ROBINSON WORLDWIDE	4,280	5,582
30 SHS ADTRAN INC	653	905
52 SHS ROLLINS INC	590	1,155
105 SHS MCKESSON HSOC INC COM	6,112	8,181
155 SHS GENERAL MILLS INC	5,041	6,264
75 SHS BOB EVANS FARMS COM	2,552	2,516
30 SHS PANERA BREAD COMPANY	2,203	4,244
48 SHS JOHN WILEY & SONS INC	2,177	2,131
55 SHS WORLD FUEL SERVICES CORP	1,577	2,309
75 SHS AMERICAN FINCL GROUP INC COM	1,948	2,767
290 SHS FEDERATED INVESTORS INC CL B FUNDS	7,291	4,394
245 SHS PROGRESSIVE CORP OHIO COM	4,795	4,780
110 SHS MEDICS PHARMACEUTICAL - CL A	2,989	3,658
1108.540 SHS ARTISAN INTERNATIONAL FD-INV #661	23,579	21,982
6,234.097 SHS GOLDMAN SACHS SATELLITE STRATEGIES	49,000	46,008
25 SHS CUBIC CORP COM	988	1,090
90 SHS AVISTA CORP COM	2,033	2,317
30 SHS ADVANCE AUTO PARTS INC	1,891	2,089
145 SHS TJX COMPANIES INC	7,364	9,360
70 SHS CHURCH & DWIGHT CO INC	2,998	3,203
75 SHS COLGATE PALMOLIVE CO INC	6,676	6,929

Name of Stock	End of Year Book Value	End of Year Fair Market Value
70 SHS FLOWERS FOODS INC COM	1,597	1,329
65 SHS DIAMOND OFFSHORE DRILLING COM	4,667	3,592
25 SHS DRESSER RAND GROUP INC	1,390	1,248
50 SHS COMMERCE BANCSHARES INC COM	1,899	1,906
275 SHS DISCOVER FINANCIAL SERVICES COM	7,382	6,600
190 SHS FULTON FINANCIAL CORP COM	1,828	1,864
50 SHS ARTHUR J GALLAGHER & CO	1,604	1,672
80 SHS PROTECTIVE LIFE CORP COM	1,735	1,805
40 SHS WADELL & REED FINANCIAL INC	1,562	991
110 SHS BAXTER INTL INC COM	6,618	5,443
20 SHS COOPER COS INC/THE COM	1,402	1,410
15 SHS WATSCO INC COM	980	985
155 SHS FAIRCHILD SEMICONDUCTOR INTL INC	2,882	1,866
60 SHS J2 GLOBAL INC	1,464	1,688
1193.628 SHS HENDERSON INTERNATIONAL OPPORTUNITIES FUND	21,939	21,306
50 SHS APTAGROUP INC.COM	2,589	2,609
230 SHS BALL CORP	8,239	8,213
55 SHS VALSPAR CORP	2,106	2,143
95 SHS VECTREN CORPORATION COM	2,669	2,872
265 SHS WISCONSIN ENERGY CORP COM	7,962	9,264

**TY 2011 Investments Government
Obligations Schedule**

Name: BLUE MOUNTAIN FOUNDATION
EIN: 23-2586321

US Government Securities - End of Year Book Value:	92,178
US Government Securities - End of Year Fair Market Value:	101,523
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2011 Other Expenses Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	462	462		0

TY 2011 Other Increases Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Description	Amount
AMOUNT TREATED AS QUALIFYING DISTRIBUTION IN 2010	1,000

TY 2011 Other Professional Fees Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK MANAGEMENT FEES	2,597	1,299		1,298