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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
The Jordan and Deanna Berman Family
Charitable Foundation

A Employer identification number
83-0414508

Number and street (or P O box number if mail is not delivered to street address)
PO Box 474

Room/suite

B Telephone number (see page 10 of the instructions)
(215) 259-1000

City or town, state, and ZIP code
Springhouse, PA 194770474

C If exemption application is pending, 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

D 1. Foreign organizations, check here ☐

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)
\$ 1,723,378

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

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 ☐

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	18	18		
	4 Dividends and interest from securities.				
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	38,944			
	b Gross sales price for all assets on line 6a _____ 47,707				
	7 Capital gain net income (from Part IV, line 2)		38,944		
	8 Net short-term capital gain				
	9 Income modifications				
	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	38,962	38,962		
	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).	1,700	0		0
	c Other professional fees (attach schedule)				
	17 Interest	2	2		0
	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).	150	150		0
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	1,852	152		0
	25 Contributions, gifts, grants paid.	130,642			130,642
	26 Total expenses and disbursements. Add lines 24 and 25	132,494	152		130,642
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-93,532			
	b Net investment income (if negative, enter -0-)		38,810		
c Adjusted net income (if negative, enter -0-)					

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	1Cash—non-interest-bearing			
	2Savings and temporary cash investments	4,811	28,291	28,291
	3Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5Grants receivable			
	6Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8Inventories for sale or use			
	9Prepaid expenses and deferred charges			
	10aInvestments—U S and state government obligations (attach schedule)			
	bInvestments—corporate stock (attach schedule)	314,820	287,280	1,695,087
	cInvestments—corporate bonds (attach schedule).			
	11Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12Investments—mortgage loans			
	13Investments—other (attach schedule)			
	14Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15Other assets (describe ▶ _____)			
	16Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	319,631	315,571	1,723,378
Liabilities	17Accounts payable and accrued expenses			
	18Grants payable			
	19Deferred revenue			
	20Loans from officers, directors, trustees, and other disqualified persons			
	21Mortgages and other notes payable (attach schedule)			
	22Other liabilities (describe ▶ _____)			
	23Total 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.			
	24Unrestricted	319,631	315,571	
	25Temporarily restricted			
	26Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27Capital stock, trust principal, or current funds			
	28Paid-in or capital surplus, or land, bldg , and equipment fund			
	29Retained earnings, accumulated income, endowment, or other funds			
	30Total net assets or fund balances (see page 17 of the instructions)	319,631	315,571	
	31Total liabilities and net assets/fund balances (see page 17 of the instructions)	319,631	315,571	

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	319,631
2	Enter amount from Part I, line 27a	2	-93,532
3	Other increases not included in line 2 (itemize) ▶ _____	3	89,472
4	Add lines 1, 2, and 3	4	315,571
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	315,571

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	400 SHARES OF DORMAN STOCK	D	2010-11-15	2011-02-24
b	1000 SHARES OF DORMAN STOCK	D		2011-10-19
c				
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 12,971		2,504	10,467
b 34,736		6,259	28,477
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) 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			10,467
b			28,477
c			
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	38,944
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	131,357	1,342,479	0 097847
2009	125,840	767,571	0 163946
2008	35,624	744,955	0 047820
2007	58,038	946,370	0 061327
2006	74,838	501,933	0 149100

2	Total of line 1, column (d).	2	0 520040
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 104008
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5.	4	1,773,256
5	Multiply line 4 by line 3.	5	184,433
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	388
7	Add lines 5 and 6.	7	184,821
8	Enter qualifying distributions from Part XII, line 4.	8	130,642

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	776
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	776
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	776
6		Credits/Payments			
a		2011 estimated tax payments and 2010 overpayment credited to 2011	6a	54	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c	722	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments Add lines 6a through 6d.		7	776
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	0
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	
11		Enter the amount of line 10 to be Credited to 2012 estimated tax ☐	Refunded ☐	11	

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		No
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) ☐ _____			
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 Jordan Berman Telephone no (215) 740-0205 Located at 119 Bay Hill Drive Blue Bell PA ZIP+4 194223264			
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.			
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?	15		
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country	16	Yes	No

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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).			
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		
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? 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?			
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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.).	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
Jordan Berman 119 Bay Hill Drive Blue Bell, PA 19422	Managing Trustee 0 00	0	0	0
Deanna Berman 119 Bay Hill Drive Blue Bell, PA 19422	Managing Trustee 0 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	1,789,846
b	Average of monthly cash balances.	1b	10,414
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	1,800,260
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	1,800,260
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	27,004
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,773,256
6	Minimum investment return. Enter 5% of line 5.	6	88,663

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	88,663
2a	Tax on investment income for 2011 from Part VI, line 5.	2a	776
b	Income tax for 2011 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	776
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	87,887
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	87,887
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	87,887

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	130,642
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	130,642
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	130,642
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				87,887
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.				87,647
e From 2010.				64,511
f Total of lines 3a through e.	152,158			
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 130,642				
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.				87,887
e Remaining amount distributed out of corpus	42,755			
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	194,913			
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	194,913			
10 Analysis of line 9				
a Excess from 2007. . . .				
b Excess from 2008. . . .				
c Excess from 2009. . . .				87,647
d Excess from 2010. . . .				64,511
e Excess from 2011. . . .				42,755

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

THE JORDAN AND DEANNA BERMAN FAMILY
PO BOX 474
SPRINGHOUSE, PA 19477
(215) 740-0205

b

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

WRITTEN APPLICATIONS SHOULD INCLUDE NAME, ADRESS AND PURPOSE OF THE ORGANIZATION

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

None

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	130,642
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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	18	
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			13	38,944	
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		38,962	0
13	Total. Add line 12, columns (b), (d), and (e).			13		38,962

[illegible]

Part XVII

1

(a)

2.

1

4.

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 <i>Paid during the year</i>				
2000 SHARES OF DORMAN PRODUCTS INC TO JEWISH FEDERATION OF GREATER PHILA 2100 ARCH STREET PHILADELPHIA,PA 19103	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	71,660
300 SHARES OF DORMAN PRODUCTS INC TO CONGREGATION BETH OR239 E WELSH ROAD MAPLE GLEN,PA 19002	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	13,508
700 SHARES OF DORMAN PRODUCTS INC TO ABINTON MEMORIAL HOSPITAL FOUNDATION1200 OLD YORK ROAD ABINGTON,PA 19001	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	11,499
700 SHARES OF DORMAN PRODUCTS INC TO UNIVERSITY OF PA CANCER CTR3400 SRUCE STREET PHILADELPHIA,PA 19104	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	11,580
ABINGTON FRIENDS SCHOOL575 WASHINGTON LANE JENKINTOWN,PA 19046	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	250
ABRAMSON CENTER FOR JEWISH LIFE1425 HORSHAM ROAD NORTH WALES,PA 194541320	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	2,000
ALBERT EINSTEIN HADASSAH50 WEST 58 STREET NEWYORK,NY 10019	None	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	810
Ambler Theatre Inc108 E BUTLER AVE AMBLER,PA 19002	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	200
AMERICAN DIABETES1701 NORTH BEAUREGARD STREET ALEXANDRIA,VA 22311	None	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	25
ATTIC YOUTH CENTER255 SOUTH 16TH STREET PHILADELPHIA,PA 19102	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	800
Autism Speaks1060 STATE ROAD 2ND FLOOR PRINCETON,NJ 08540	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
Childrens Hosp Fdn13123 EAST 16TH AVENUE PO BOX 045 AURORA,CO 80045	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	200
DAMON RUNYON CANCER RESEARCH FOUNDATION55 BROADWAY SUITE 302 NEWYORK,NY 10006	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	2,990
DOCTORS WITHOUT BORDERS333 7TH AVENUE 2ND FLOOR NEWYORK,NY 10001	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
Easter Seals233 SOUTH WACKER DRIVE SUITE 2400 CHICAGO,IL 60606	None	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	50
Endow a Home3721 MIDVALE AVENUE PHILADELPHIA,PA 19129	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
FRIENDS OF THE SAMUEL PALEY DAY CARE CENTER3344 PHILMONT AVE HUNTINGDON VALLEY,PA 19006	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
GERMANTOWN ACADEMY340 MORRIS ROAD FORT WASHINGTON,PA 19034	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	200
Habitat for Humanity1829 NORTH 19TH STREET PHILADELPHIA,PA 19121	NONE	PUBLIC CHARITY	ENERAL CHARITABLE PURPOSES	50
HEIFER INTL1 WORLD AVENUE LITTLE ROCK,AR 72202	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
MACULAR VISION RESEARCH FOUNDATION100 FRONT STREET CONSHOCHOCKEN,PA 19428	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	300
Make A Wish512 EAST TOWNSHIP LINE ROAD STE 113 BLUE BELL,PA 19422	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	50
Nat'I MS Soc1 REED STREET STE 200 PHILADELPHIA,PA 19147	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	250
NATIONAL MUSEUM OF AMERICAN JEWISH HISTORY101 SOUTH INDEPENDENCE MALL EAST PHILADELPHIA,PA 191062517	None	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	180
PA SPCA350 E ERIE AVENUE PHILADELPHIA,PA 19134	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	25
Philabundance3616 SOUTH GALLOWAY STREET PHILADELPHIA,PA 19148	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
RICHARD J POGACH MD MEM FUND3535 MARKET STREET SUITE 750 PHILADELPHIA,PA 19104	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
SADS508 E SOUTH TEMPLE STE 202 SALT LAKE CITY,UT 84102	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	25
SMILE TRAIN41 MADISON AVE 28TH FLOOR NEWYORK,NY 10010	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	25
Society of Illustators128 EAST 63RD STREET NEWYORK,NY 10065	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	6,250

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				
SUSAN G Komen for the Cure125 S 9TH STREET 202 PHILADELPHIA,PA 19107	None	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
Walnut Street Theatre825 WALNUT STREET PHILADELPHIA,PA 19107	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	50
Whitpain Police AssocPO BOX 1021 BLUE BELL,PA 19422	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	25
WHYY150 NORTH SIXTH STREET PHILADELPHIA,PA 19106	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	50
Wissachicon Valley Public Lib650 SKIPPACK PIKE BLUE BELL,PA 194221710	None	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	25
WM PENN CHARTER SCHOOL3000 WEST SCHOOL HOUSE LANE PHILADELPHIA,PA 191445412	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	200
World Wildlife Fund1250 TWENTY-FOURTH STREET NW PO BOX 97180 WASHINGTON,DC 200907180	None	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	50
WORLD AFFAIRS COUNCILONE SOUTH BROAD ST - STE 2M PHILADELPHIA,PA 19107	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
KIDS WISH NETWORK4060 LOUIS AVE HOLIDAY,FL 34691	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	55
THE CARMELITE MONASTERY1400 W 66TH AVENUE PHILADELPHIA,PA 19126	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	300
HADASSAH50 WEST 58TH STREET NEW YORK,NY 10019	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	810
THE KIMMWL CANCER CTR OF TJU - UVEAL MELANOME FOR DR TAKAMI SATO1015 WALNUT STREET PHILADELPHIA,PA 19107	NONE	PUBLIC CHARITY	BONNIE KROLL MELANOMA MEMORIAL FUND - RESEARCH	1,150
ELKINS PARK PRESBY CHURCH234 CEDAR ROAD ELKINS PARK,PA 19027	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	500
PERUZZI PONTIACPO BOX 22718 OKLAHOMA CITY,OK 73123	NONE	PUBLIC CHARITY	THE AMERICAN CANCER SOCIETY & ST MARYS REGIONAL CANCER CTR	200
BREWERYTOWN CDC3000 WEST MASTER STREET PHILADELPHIA,PA 19121	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	750
FAIR FOOD INCPO BOX 220168 DORCHESTER,MA 02122	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	500
PHILADELPHIA CORPORATION FOR AGING (PCA)642 NORTH BROAD STREET PHILADELPHIA,PA 19130	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
ACADEMY OF MANAYUNK1200 RIVER ROAD CONSHOCHOCKEN,PA 19428	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
MANNAPO BOX 30181 PHILADELPHIA,PA 19103	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
NATIONAL WILDLIFE FEDERATION 11100 WILDLIFE CENTER DRIVE RESTON,VA 20190	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	25
GIFT OF LIFE800 YAMATO ROAD-STE 101 BOCA RATON,FL 33431	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
NATIONAL CANCER RESEARCH 4600 EAST WEST HIGHWAY - STE 525 BETHESDA,MD 20814	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	25
SPECIAL OLYMPICS1133 19TH STREET NW WAHINGTON,DC 200363604	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	25
BETH TOVIM CONGREGATION5871 DREXEL ROAD PHILADELPHIA,PA 19131	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	25
SLOAN KETTERING CANCER SOFT TI1275 YORK AVENUE NEW YORK,NY 10065	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	200
MADD511 E JOHN CARPENTER FREEWAY - STE 700 IRVING,TX 75062	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
FDN FIGHTING BLINDNESS7168 COLUMBIA GATEWAY DRIVE - 100 COLUMBIA,MD 21046	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	100
BIGGS MUSEUM OF AMERICAN ART 406 FEDERAL STREET DOVER,DE 19901	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	250
NORMAN ROCKWELL MUSEUM9 ROUTE 183 STOCKBRIDGE,MA 01262	NONE	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	1,000
Total  3a				130,642

TY 2011 Accounting Fees Schedule

Name: The Jordan and Deanna Berman Family
Charitable Foundation
EIN: 83-0414508

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	1,700	0		0

**TY 2011 Investments Corporate
Stock Schedule**

Name: The Jordan and Deanna Berman Family
Charitable Foundation
EIN: 83-0414508

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Merrill Lynch Equities	287,280	1,695,087

TY 2011 Other Expenses Schedule

Name: The Jordan and Deanna Berman Family
Charitable Foundation
EIN: 83-0414508

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Fees	150	150		0

TY 2011 Other Increases Schedule

Name: The Jordan and Deanna Berman Family
Charitable Foundation
EIN: 83-0414508

Description	Amount
UNREALIZED GAIN ON STOCK DONATED	89,472

Additional Data

Software ID:
Software Version:
EIN: 83-0414508
Name: The Jordan and Deanna Berman Family
Charitable Foundation

Form 990PF - Special Condition Description:

Special Condition Description