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Form **990-PF**

Return of Private Foundation

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

OMB No. 1545-0052

2012

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

For calendar year **2012** or tax year beginning , **2012**, and ending , **20**Name of foundation **KAUFMAN FAMILY FOUNDATION STACEY GERRISH,
JENIFER MATHIEU & CFSG CO-TRUSTEES**A Employer identification number
03-6111428

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

Room/suite

B Telephone number (see instructions)

P.O. BOX 120**802- 334-1677**

City or town, state, and ZIP code

NEWPORT, VT 05855

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change

H Check type of organization:

☒ Section 501(c)(3) exempt private foundationC 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 ☐☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end

J Accounting method: ☒ Cash ☐ Accrual

of year (from Part II, col. (c), line

☐ Other (specify) _____16) **\$ 6,216,117.**

(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 instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)	841,965.			
2 Check ☐ if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	160,914.	160,914.		STMT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	283,672.			
b Gross sales price for all assets on line 6a	1,919,710.			
7 Capital gain net income (from Part IV, line 2)		283,672.		
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)	1,907.			STMT 4
12 Total. Add lines 1 through 11	1,288,458.	444,586.		
13 Compensation of officers, directors, trustees, etc.	18,190.	10,914.		7,276.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see instructions)	4,084.	2,575.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)				
24 Total operating and administrative expenses. Add lines 13 through 23	22,274.	13,489.		7,276.
25 Contributions, gifts, grants paid	300,000.			300,000.
26 Total expenses and disbursements. Add lines 24 and 25	322,274.	13,489.		307,276.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	966,184.			
b Net investment income (if negative, enter -0-)		431,097.		
c Adjusted net income (if negative, enter -0-)				

ENVELOPE
POSTMARK DATE MAY 15 2013

SCANNED MAY 22 2013

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		529,713.	624,607.	624,607.
	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				
	10 a	Investments - U S and state government obligations (attach schedule)	STMT 6	310,243.	254,121.	253,660.
	b	Investments - corporate stock (attach schedule)	STMT 7	2,244,354.	2,866,469.	3,628,789.
	c	Investments - corporate bonds (attach schedule)	STMT 8	153,685.	1,267,082.	1,293,659.
	11	Investments - land, buildings, and equipment: basis				
	Less: accumulated depreciation (attach schedule) ▶					
12	Investments - mortgage loans					
13	Investments - other (attach schedule)	STMT 9	1,229,745.	414,916.	415,400.	
14	Land, buildings, and equipment: basis					
	Less: accumulated depreciation (attach schedule) ▶					
15	Other assets (describe ▶)	STMT 10	2.	2.	2.	
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		4,467,742.	5,427,197.	6,216,117.	
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)			NONE	
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		4,467,742.	5,427,197.	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances (see instructions)		4,467,742.	5,427,197.	
	31	Total liabilities and net assets/fund balances (see instructions)		4,467,742.	5,427,197.	

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	4,467,742.
2	Enter amount from Part I, line 27a	2	966,184.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 11	3	1,559.
4	Add lines 1, 2, and 3	4	5,435,485.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 12	5	8,288.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	5,427,197.

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.)
1a PUBLICLY TRADED SECURITIES					
b					
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 1,919,710.		1,636,038.	283,672.		
b					
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			283,672.		
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)			2	283,672.	
{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }					
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):			3		
{ If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 }					

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 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))
2011	235,971.	5,107,149.	0.046204
2010	228,916.	4,824,140.	0.047452
2009	210,772.	4,388,189.	0.048032
2008	268,983.	5,283,230.	0.050913
2007	123,550.	2,908,724.	0.042476
2 Total of line 1, column (d)			2 0.235077
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 0.047015
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5			4 6,165,883.
5 Multiply line 4 by line 3			5 289,889.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 4,311.
7 Add lines 5 and 6			7 294,200.
8 Enter qualifying distributions from Part XII, line 4			8 307,276.

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.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see 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)		1	4,311.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b.			
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	
3 Add lines 1 and 2.		3	4,311.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	NONE
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	4,311.
6 Credits/Payments:			
a 2012 estimated tax payments and 2011 overpayment credited to 2012.	6a	1,509.	
b Exempt foreign organizations - tax withheld at source.	6b	NONE	
c Tax paid with application for extension of time to file (Form 8868).	6c	NONE	
d Backup withholding erroneously withheld.	6d		
7 Total credits and payments. Add lines 6a through 6d.	7	1,509.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	49.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed.	9	2,851.	
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 2013 estimated tax ☐ Refunded ☐	11		

Part VII-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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? 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.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ _____		
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		X
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.		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
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?	X	
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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ VT		
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.	X	
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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV.		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses. STMT 13		X

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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 instructions)	11		X
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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ► <u>N/A</u>				
14	The books are in care of ► <u>COMMUNITY FINANCIAL SERVICES GROUP</u> Telephone no ► <u>(802) 334-1677</u>			
	Located at ► <u>P.O. BOX 120, NEWPORT, VT</u> ZIP+4 ► <u>05855-0120</u>			
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 ► <u>15</u>			
16	At any time during calendar year 2012, 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 instructions)? ☐	1b	
Organizations relying on a current notice regarding disaster assistance check here ► ☐		
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 2012?	1c	X
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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? ☐ Yes ☒ No		
If "Yes," list the years ► _____		
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	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____		
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 2012 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 2012.)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
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 2012?	4b	X

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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 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 instructions)? ☐ Yes ☒ NoOrganizations relying on a current notice regarding disaster assistance check here ☐**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? ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

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? ☐ Yes ☒ No

If "Yes" to 6b, file Form 8870.

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? ☐ Yes ☒ No**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 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
COMMUNITY FINANCIAL SERVICES GROUP P.O. BOX 120, NEWPORT, VT 05855	TRUSTEE 1	18,190.	-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		NONE	NONE	NONE

Total number of other employees paid over \$50,000 ☐ **NONE**

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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 instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		NONE
Total number of others receiving over \$50,000 for professional services ▶		NONE

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	NONE	
2		
3		
4		

Part IX-B 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	NONE	
2		
All other program-related investments See instructions		
3	NONE	
Total. Add lines 1 through 3 ▶		

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Part X 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	5,524,098.
b	Average of monthly cash balances	1b	735,682.
c	Fair market value of all other assets (see instructions)	1c	NONE
d	Total (add lines 1a, b, and c)	1d	6,259,780.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	6,259,780.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	93,897.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,165,883.
6	Minimum investment return. Enter 5% of line 5	6	308,294.

Part XI 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 X, line 6	1	308,294.
2a	Tax on investment income for 2012 from Part VI, line 5 2a		4,311.
b	Income tax for 2012. (This does not include the tax from Part VI.) 2b		
c	Add lines 2a and 2b	2c	4,311.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	303,983.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	303,983.
6	Deduction from distributable amount (see instructions)	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	303,983.

Part XII 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	307,276.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	307,276.
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 instructions)	5	4,311.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	302,965.

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 instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				303,983.
2 Undistributed income, if any, as of the end of 2012.				
a Enter amount for 2011 only			NONE	
b Total for prior years: 20 <u>10</u> , 20 <u> </u> , 20 <u> </u>		NONE		
3 Excess distributions carryover, if any, to 2012				
a From 2007	NONE			
b From 2008	9,779.			
c From 2009	NONE			
d From 2010	NONE			
e From 2011	NONE			
f Total of lines 3a through e	9,779.			
4 Qualifying distributions for 2012 from Part XII, line 4: ► \$ <u>307,276.</u>				
a Applied to 2011, but not more than line 2a			NONE	
b Applied to undistributed income of prior years (Election required - see instructions)		NONE		
c Treated as distributions out of corpus (Election required - see instructions)	NONE			
d Applied to 2012 distributable amount				303,983.
e Remaining amount distributed out of corpus	3,293.			
5 Excess distributions carryover applied to 2012 . (If an amount appears in column (d), the same amount must be shown in column (a))	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	13,072.			
b Prior years' undistributed income. Subtract line 4b from line 2b		NONE		
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		NONE		
d Subtract line 6c from line 6b. Taxable amount - see instructions		NONE		
e Undistributed income for 2011. Subtract line 4a from line 2a Taxable amount - see instructions			NONE	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				NONE
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	NONE			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)	NONE			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	13,072.			
10 Analysis of line 9				
a Excess from 2008	9,779.			
b Excess from 2009	NONE			
c Excess from 2010	NONE			
d Excess from 2011	NONE			
e Excess from 2012	3,293.			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section

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) 2012	(b) 2011	(c) 2010	(d) 2009	
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 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).)

N/A

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.

N/A

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 instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail 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	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 STATEMENT 22				300,000.
Total			▶ 3a	300,000.
b Approved for future payment				
Total			▶ 3b	

Schedule of Contributors

OMB No. 1545-0047

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

2012

Name of the organization

Employer identification number

KAUFMAN FAMILY FOUNDATION STACEY GERRISH,

03-6111428

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year ► \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990; or check the box on line H of its Form 990-EZ or on Part I, line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization

KAUFMAN FAMILY FOUNDATION STACEY GERRISH,

Employer identification number

03-6111428

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BARBARA KAUFMANN TRUST, 062-32-8677 PO BOX 820 BURLINGTON, VT 05402	\$ 22,769.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
2	BARBARA KAUFMAN P O BOX 820 BURLINGTON, VT 05402	\$ 819,196.	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

Employer identification number

03-6111428

Part II

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
___ 2 ___	FMV SHARES OF STOCK _____ _____ _____	\$ _____ 979,328 .	_01/13/2012_
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	_____ _____ _____ _____	\$ _____	_____

FORM 990PF, PART VII-A - NEW SUBSTANTIAL CONTRIBUTORS
=====

NAME AND ADDRESS

BARBARA KAUFMANN TRUST, [REDACTED]
PO BOX 820
BURLINGTON, VT 05402

BARBARA KAUFMAN
P O BOX 820
BURLINGTON, VT 05402

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
AMERICAN EXPRESS CENTRN CD DTD 11/10/201	577.	577.
ASTEC INDUSTRIES INC	2,898.	2,898.
BLACKROCK LIQUIDITY FEDERAL TR DOLLAR MM	81.	81.
BOEING CO	2,353.	2,353.
CISCO SYSTEMS INC	2,567.	2,567.
COCA COLA CO	2,495.	2,495.
COMMUNITY BANK SYSTEM INC	3,289.	3,289.
CORNING INC	1,452.	1,452.
COSTCO WHOLESALE CORP NEW	8,259.	8,259.
CREDIT SUISSE FIRST BOSTON USA INC NOTE	2,750.	2,750.
DEUTSCHE TELEKOM AG SPONSORED AD	4,787.	4,787.
DR REDDYS LABORATORIES LTD ADR REPRESENT	712.	712.
DUKE ENERGY CORP	1,865.	1,865.
EAST WEST BANCORP INC	1,292.	1,292.
EMERSON ELECTRIC CO	2,500.	2,500.
FEDERAL FARM CREDIT BANK NT DTD 05/15/20	4,150.	4,150.
FED FARM CREDIT BANK 4.5% 10/17/2012	4,500.	4,500.
FEDERAL HOME LOAN BANK MULTI STEP CALLAB	281.	281.
FED HOME LOAN BANK STEP UP 1%-1/14, 1.5%	250.	250.
FEDERAL HOME LOAN BANK NT DTD 11/03/2005	2,438.	2,438.
FEDERAL HOME LOAN BANK BOND DTD 11/27/20	2,438.	2,438.
GENERAL ELECTRIC	3,243.	3,243.
GLAXO PLC SPONSORED ADR	4,796.	4,796.
GOLDMAN SACHS GROUP INC SENIOR NOTE DTD	2,875.	2,875.
ISHARES INC MSCI TAIWAN INDEX FUND	2,605.	2,605.
ISHARES NASDAQ BIOTECHNOLOGY INDEX FUND	546.	546.
ISHARES RUSSELL 3000 GROWTH INDEX ETF	2,783.	2,783.
ISHARES BARCLAYS 1-3 YEAR CREDIT BOND FU	5,252.	5,252.
J P MORGAN CHASE & CO	267.	267.
KRAFT FOODS INC VA CL A	2,785.	2,785.
LORD ABBETT INVESTMENT TRUST SHORT DURAT	13,700.	13,700.
MCKESSON CORP	1,160.	1,160.

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FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
MICROSOFT CORP	2,365.	2,365.
PIMCO FUNDS LOW DURATION FUND	4,059.	4,059.
PFIZER INC	3,978.	3,978.
PIMCO 0-5 YR HI YIELD CORP BD IDX ETF	2,839.	2,839.
PROCTOR & GAMBLE CO	617.	617.
PROGRESS ENERGY INC	2,014.	2,014.
ROYAL DUTCH SHELL PLC SPONSORED ADR REPR	3,643.	3,643.
SARA LEE CORP	586.	586.
SCHLUMBERGER LTD	1,258.	1,258.
CHARLES SCHWAB CO.	1,068.	1,068.
SONY CORP	398.	398.
STAPLES INC	2,545.	2,545.
STATE BK INDIA NEW YORK NY CD DTD 06/28/	526.	526.
TAIWAN SEMICONDUCTOR MANUFACTURING CO LT	4,132.	4,132.
TIDEWATER INC	1,577.	1,577.
PINNACLE BANK CD #1000006478 2.5% 02/13/	127.	127.
PINNACLE BANK CD #1000006479 2.5% 02/13/	380.	380.
BANK 7 CD #74990 .5% 12/23/2011	45.	45.
VALERO ENERGY CORP NEW	1,811.	1,811.
VANGUARD SHORT TERM CORPORATE BOND #39	4,799.	4,799.
VANGUARD FIXED INCOME SECURITIES FUND IN	2,960.	2,960.
VENTAS INC	2,385.	2,385.
VANGUARD MIDCAP GROWTH IDX ETF	1,188.	1,188.
VERIZON COMMUNICATIONS	3,342.	3,342.
WELLS FARGO CO 5.125% 09/01/2012	2,563.	2,563.
XEROX CORP	1,775.	1,775.
CNB CASH MANAGEMENT FUND	1,340.	1,340.
SECURITY BANK CD #27586 1.45% 02/26/2013	1,090.	1,090.
MILLEDGEVILLE STATE BANK 1.25% 08/27/201	706.	706.
ENTERPRISE BANK CD #19728 1.2% 09/04/201	457.	457.
CARVER FSB CD #801192420 1.3% 03/09/2013	521.	521.
FIRST SECURITY BUSINESS BANK CD #8140791	752.	752.
WORLD'S FOREMOST BANK, NA CD #18680 1.1%	505.	505.

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FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
METLIFE BANK, NA .8% 07/20/2013	235.	235.
SEAGATE TECHNOLOGY (ISIN #IE00B58JVZ52 S	5,498.	5,498.
BANCO LATINOAMERICANO DE EXPORTACIONES	4,884.	4,884.
	-----	-----
TOTAL	160,914.	160,914.
	=====	=====

FORM 990PF, PART I - OTHER INCOME
=====DESCRIPTION
-----REVENUE
AND
EXPENSES
PER BOOKS

TOTALS

1,907.
=====

FORM 990PF, PART I - TAXES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
FOREIGN TAXES	1,927.	1,927.
FEDERAL ESTIMATES - PRINCIPAL	1,509.	
FOREIGN TAXES ON NONQUALIFIED	648.	648.
	-----	-----
TOTALS	4,084.	2,575.
	=====	=====

KAUFMAN FAMILY FOUNDATION STACEY GERRISH,
 FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS
 =====

03-6111428

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ---
FHLB, & FFCB	254,121.	253,660.
	-----	-----
TOTALS	254,121.	253,660.
	=====	=====

KAUFMAN FAMILY FOUNDATION STACEY GERRISH,

03-6111428

FORM 990PF, PART II - CORPORATE STOCK

=====

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ---
COMMON STOCK	1,871,774.	2,306,683.
FOREIGN STOCK	538,290.	758,928.
MUTUAL FUNDS / STOCKS	456,405.	563,178.
	-----	-----
TOTALS	2,866,469.	3,628,789.
	=====	=====

KAUFMAN FAMILY FOUNDATION STACEY GERRISH,

03-6111428

FORM 990PF, PART II - CORPORATE BONDS

=====

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ---
CORPORATE BONDS	102,750.	108,470.
MUTUAL FUNDS/CORP BONDS	1,164,332.	1,185,189.
	-----	-----
TOTALS	1,267,082.	1,293,659.
	=====	=====

. KAUFMAN FAMILY FOUNDATION STACEY GERRISH,

03-6111428

FORM 990PF, PART II - OTHER INVESTMENTS

=====

DESCRIPTION -----	COST/ FMV C OR F -----	ENDING BOOK VALUE -----	ENDING FMV ---
CD'S	C	414,916.	415,400.
		-----	-----
TOTALS		414,916.	415,400.
		=====	=====

KAUFMAN FAMILY FOUNDATION STACEY GERRISH,

03-6111428

FORM 990PF, PART II - OTHER ASSETS

=====

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ---
KAUFMAN FAMILY FOUNDATION TR	1.	1.
IRS DETERMINATION OF CHARITABL	1.	1.
	-----	-----
TOTALS	2.	2.
	=====	=====

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES
=====

DESCRIPTION -----	AMOUNT -----
DIFF IN LT G/L ONESOURCE IS LESS	1,383.
CASH DIFFERENCE FROM OLD SYSTEM TO NEW	176.

TOTAL	1,559.
	=====

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

=====

DESCRIPTION -----	AMOUNT -----
BLACKROCK LIQUIDITY FEDERAL TR DOLLAR MM	12.
ISHARES BARCLAYS 1-3 YEAR CREDIT BOND FU	444.
VANGUARD FIXED INCOME SECURITIES FUND INC SHORT-TERM CO	557.
CNB CASH MANAGEMENT FUND	104.
PIMCO FUNDS LOW DURATION FUND	205.
PIMCO 0-5 YR HI YIELD CORP BD IDX ETF	360.
LORD ABBETT INVESTMENT TRUST SHORT DURAT	1,088.
VNGRD FI SEC FD INC S-T CO DIFFERENCE OF CASH & FACTORS	425.
DIFF IN ST G/L ONESOURCE IS GREATER	3,210.
PRECONVERSION TIMING DIFFERENCE	1,883.

TOTAL	8,288.
	=====

RECIPIENT NAME:
DOCTORS WITHOUT BORDERS,
USA
ADDRESS:
PO BOX 1856
MERRIFIELD, VA 22116-8056
RELATIONSHIP:
NO RELATIONSHIP
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
EXEMPT
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
SUSTAINABLE HARVEST INTL
ADDRESS:
779 NORTH BEND RD
SURRY, ME 04684
RELATIONSHIP:
NO RELATIONSHIP
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
EXEMPT
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
UNITED PALESTINIAN APPEAL INC
ADDRESS:
1330 NEW HAMPSHIRE AVE NW
WASHINGTON, DC 20036
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
EXEMPT
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
PARTNERS IN HEALTH
ADDRESS:
P.O. BOX 996
FREDERICK, MD 21705-9942
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
EXEMPT
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
WISE
ADDRESS:
38 BANK STREET
LEBANON, NH
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
NONE
AMOUNT OF GRANT PAID 7,500.

RECIPIENT NAME:
THE CYCLE EFFECT 501(C)3 PENDING
ADDRESS:
35 STONEGATE CIRCLE
EDWARDS, CO 81632
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
PENDING 501(C)3
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:

First Descents World Headquarters

ADDRESS:

767 SANTA FE DR.

Denver, CO 80204

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL

FOUNDATION STATUS OF RECIPIENT:

501(C)3

AMOUNT OF GRANT PAID 12,000.

RECIPIENT NAME:

YOUTH FOUNDATION

EDUCATION ARM OF Vail Valley FNDTN

ADDRESS:

90 BENCHMARK ROAD, SUITE 300

AVON, CO 81630

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

EDUCATION

FOUNDATION STATUS OF RECIPIENT:

501(C)3

AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:

PHAT - PROTECT HEAD AT ALL TIMES

DR. ROBERT WILLIAMS @ UHC

ADDRESS:

111 COLCHESTER AVENUE

BURLINGTON, VT 05401

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL

FOUNDATION STATUS OF RECIPIENT:

501(C)3

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:

ANERA-AMER. NEAR EAST REFUGEE AID

ADDRESS:

1111 14TH ST. NW, SUITE 400

WASHINGTON, DC 20005

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL

FOUNDATION STATUS OF RECIPIENT:

501(C)3

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:

ARCHITECTURE FOR HUMANITY

ADDRESS:

695 MINNA STREET

San Francisco, CA 94103-2717

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL

FOUNDATION STATUS OF RECIPIENT:

501(C)3

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:

LA RAZA LEGAL CENTER

ADDRESS:

474 VALENCIA ST. #295

San Francisco, CA 94103

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL

FOUNDATION STATUS OF RECIPIENT:

501(C)3

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
INSTITUTE FOR POLICY STUDIES
ADDRESS:
1112 16TH ST NW SUITE 600
WASHINGTON, DC 20036
RELATIONSHIP:
N/A
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
501(C)3
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
CIP-CENTER FOR INTERNATIONAL POLICY
STUDY
ADDRESS:
1717 MASSACUSSETTS AVE NW
WASHINGTON, DC 20036
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
501(C)3
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
VINS - VT INST. OF NATURAL SCIENCES
ADDRESS:
6565 WOODSTOCK ROAD
QUECHEE, VI 05059
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CAMP
FOUNDATION STATUS OF RECIPIENT:
501(C)3
AMOUNT OF GRANT PAID 6,000.

KAUFMAN FAMILY FOUNDATION STACEY GERRISH, 03-6111428
FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID
=====

RECIPIENT NAME:
PLANNED PARENTHOOD OF
NORTHERN NEW ENGLAND
ADDRESS:
183 TALCOTT ROAD SUITE 101
WILLISTON, VT 05495
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
N/A
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
SPAC - SARATOGA PERFORMING ARTS
CENTER
ADDRESS:
108 AVENUE OF THE PINES
SARATOGA SPRINGS, NY 12866
AMOUNT OF GRANT PAID 47,500.

RECIPIENT NAME:
VERMONT FOOD BANK
Wilson Industrial Park
ADDRESS:
33 PARKER ROAD
BARRE, VT 05641
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
N/A
AMOUNT OF GRANT PAID 20,000.

RECIPIENT NAME:

The Lustgarten Foundation

ADDRESS:

1111 STEWART AVENUE

Bethpage, NY 11714

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL

FOUNDATION STATUS OF RECIPIENT:

501(C)3

AMOUNT OF GRANT PAID 20,000.

RECIPIENT NAME:

Friends of the High Line

ADDRESS:

529 WEST 20TH STREET, SUITE 8W

NEW YORK, NY 10011

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL

FOUNDATION STATUS OF RECIPIENT:

501(C)3

AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:

Food & Water Watch

ADDRESS:

1616 P STREET NW SUITE 300 WASHINGT

Washington, DC 20036

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL

FOUNDATION STATUS OF RECIPIENT:

501(C)

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
HEIFER INTERNATIONAL
ADDRESS:
1 WORLD AVE
LITTLE ROCK, AR 72202
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
501(C)3
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
ASHA FOR EDUCATION; AMERICAN
SPEECH-LANGUAGE HEARING ASSOCIATION
ADDRESS:
PO BOX 322
NEW YORK, NY 10040-0322
RELATIONSHIP:
NO RELATIONSHIP
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
EXEMPT
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
LA LUZ CENTER
ADDRESS:
17560 GREGER ST
SONOMA, CA 95476
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
501(C)3
AMOUNT OF GRANT PAID 10,000.

KAUFMAN FAMILY FOUNDATION STACEY GERRISH, 03-6111428
FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID
=====

RECIPIENT NAME:
Vermont Adaptive Ski & Sports
ADDRESS:
P.O. BOX 139
KILLINGTON, VT 05751
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
501(C)3
AMOUNT OF GRANT PAID 7,500.

RECIPIENT NAME:
Denver Children's Home
ADDRESS:
1501 ALBION STREET
DENVER, CO 80220
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
501(C)3
AMOUNT OF GRANT PAID 7,500.

TOTAL GRANTS PAID: 300,000.
=====

**SCHEDULE D
(Form 1041)**

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

► Attach to Form 1041, Form 5227, or Form 990-T.
► Information about Schedule D (Form 1041) and its separate instructions is at
www.irs.gov/form1041

OMB No 1545-0092

2012

Name of estate or trust

KAUFMAN FAMILY FOUNDATION STACEY GERRISH,

Employer identification number

03-6111428

Note: Form 5227 filers need to complete only Parts I and II.

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example: 100 shares 7% preferred of "Z" Co.)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	17,089.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2011 Capital Loss Carryover Worksheet	4	()
5 Net short-term gain or (loss). Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back	5	17,089.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example: 100 shares 7% preferred of "Z" Co.)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr.)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a LONG-TERM CAPITAL GAIN DIVIDENDS					3,429.

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	263,090.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9 Capital gain distributions	9	64.
10 Gain from Form 4797, Part I	10	
11 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2011 Capital Loss Carryover Worksheet	11	()
12 Net long-term gain or (loss). Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back	12	266,583.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2012

Part III Summary of Parts I and II		(1) Beneficiaries' (see instr.)	(2) Estate's or trust's	(3) Total
Caution: Read the instructions before completing this part.				
13	Net short-term gain or (loss)	13		17,089.
14	Net long-term gain or (loss):			
a	Total for year	14a		266,583.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	14b		64.
c	28% rate gain	14c		
15	Total net gain or (loss). Combine lines 13 and 14a ▶	15		283,672.

Note: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation

16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of: a The loss on line 15, column (3) or b \$3,000	16	()
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Note: If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if:

- Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34) . . .	17	
18	Enter the smaller of line 14a or 15 in column (2) but not less than zero	18	
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T) . .	19	
20	Add lines 18 and 19	20	
21	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- . . . ▶	21	
22	Subtract line 21 from line 20. If zero or less, enter -0-	22	
23	Subtract line 22 from line 17. If zero or less, enter -0-	23	
24	Enter the smaller of the amount on line 17 or \$2,400	24	
25	Is the amount on line 23 equal to or more than the amount on line 24? ☐ Yes. Skip lines 25 and 26; go to line 27 and check the "No" box. ☐ No. Enter the amount from line 23	25	
26	Subtract line 25 from line 24	26	
27	Are the amounts on lines 22 and 26 the same? ☐ Yes. Skip lines 27 thru 30, go to line 31 ☐ No. Enter the smaller of line 17 or line 22	27	
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)	28	
29	Subtract line 28 from line 27	29	
30	Multiply line 29 by 15% (.15)	30	
31	Figure the tax on the amount on line 23. Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	31	
32	Add lines 30 and 31	32	
33	Figure the tax on the amount on line 17. Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	33	
34	Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	34	

Schedule D (Form 1041) 2012

Department of the Treasury
Internal Revenue Service

▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

OMB No. 1545-0092

2012

► Information about Schedule D (Form 1041) and its separate instructions is at www.irs.gov/form1041

Name of estate or trust

Employer identification number

KAUFMAN FAMILY FOUNDATION STACEY GERRISH.

03-6111428

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less[illegible]

1b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 1b	17,089.00
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For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D-1 (Form 1041) 2012

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Name of estate or trust as shown on Form 1041. Do not enter name and employer identification number if shown on the other side

Employer identification number

KAUFMAN FAMILY FOUNDATION STACEY GERRISH,

03-6111428

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example: 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 590. BECTON DICKINSON & CO	08/09/2006	01/18/2012	45,017.00	39,333.00	5,684.00
999. CHUBB CORPORATION	01/30/2008	01/18/2012	70,020.00	52,695.00	17,325.00
100000. FED FARM CREDIT BA 10/17/2012	01/30/2008	10/17/2012	100,000.00	104,396.00	-4,396.00
50000. FEDERAL HOME LOAN B 11/03/2005	11/29/2007	12/14/2012	50,000.00	51,726.00	-1,726.00
1197. GENUINE PARTS CO	01/30/2008	01/18/2012	76,074.00	52,566.00	23,508.00
2068. HENRY JACK & ASSOCIA	01/30/2008	01/18/2012	69,222.00	51,824.00	17,398.00
2473. INTEL CORP	01/30/2008	01/18/2012	62,665.00	52,131.00	10,534.00
1956. ISHARES MSCI EAFE IN	11/19/2008	01/18/2012	99,500.00	76,148.00	23,352.00
1069. J P MORGAN CHASE & C	01/30/2008	01/18/2012	38,933.00	52,411.00	-13,478.00
805. JOHNSON & JOHNSON INC	01/30/2008	01/18/2012	52,397.00	50,514.00	1,883.00
678. LABORATORY CORP AMER	VAR	01/18/2012	59,858.00	52,703.00	7,155.00
235. NCR CORP NEW	07/09/2010	05/09/2012	5,376.00	3,048.00	2,328.00
4513. NCR CORP NEW	VAR	07/19/2012	110,464.00	49,207.00	61,257.00
1109. PEPSICO INC	VAR	01/18/2012	71,995.00	62,507.00	9,488.00
959. PRICE T ROWE GROUP IN	02/26/2007	01/18/2012	57,242.00	45,970.00	11,272.00
1175. PROCTOR & GAMBLE CO	VAR	01/18/2012	77,455.00	66,233.00	11,222.00
5093. SARA LEE CORP	07/09/2010	01/18/2012	97,530.00	73,491.00	24,039.00
25000. PINNACLE BANK CD #1 2.5% 02/13/	08/13/2009	02/13/2012	25,000.00	25,000.00	
75000. PINNACLE BANK CD #1 2.5% 02/13/	08/13/2009	02/13/2012	75,000.00	75,000.00	
779. UNITED TECHNOLOGIES C	05/29/2003	01/18/2012	60,341.00	25,869.00	34,472.00
20. VALERO ENERGY CORP NEW	07/09/2010	01/18/2012	460.00	358.00	102.00
2187. VANGUARD SMALL CAP V	04/10/2008	01/18/2012	144,078.00	135,272.00	8,806.00
50000. WELLS FARGO CO 5.12 09/01/2012	11/27/2007	09/01/2012	50,000.00	50,000.00	
75000. MILLEDGEVILLE STATE 08/27/201	08/26/2010	08/27/2012	75,000.00	75,000.00	
50000. ENTERPRISE BANK CD 09/04/201	09/02/2010	09/04/2012	50,000.00	50,000.00	

6b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 6b

Schedule D-1 (Form 1041) 2012

