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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

2012

Open to public inspection

For calendar year 2012 or tax year beginning

, and ending

Name of foundation THE MARION & NORMAN TANZMAN CHARITABLE FOUNDATION		A Employer identification number 22-3506061
Number and street (or P.O. box number if mail is not delivered to street address) P.O. BOX 1408	Room/suite	B Telephone number 732-750-5757
City or town, state, and ZIP code WOODBRIIDGE, NJ 07095		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 22,497,771.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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))		(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	0.			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	800,130.	800,130.	800,130.	STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	73,657.			
	b Gross sales price for all assets on line 6a	7,225,466.			
	7 Capital gain net income (from Part IV, line 2)		73,657.		
	8 Net short-term capital gain			N/A	
Operating and Administrative Expenses	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income	33,503.	6,987.	33,503.	STATEMENT 2
	12 Total. Add lines 1 through 11	907,290.	880,774.	833,633.	
	13 Compensation of officers, directors, trustees, etc.	0.	0.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 3	600.	0.	0.	0.
	b Accounting fees STMT 4	10,550.	0.	0.	0.
	c Other professional fees STMT 5	118,346.	65,170.	0.	0.
	17 Interest				
	18 Taxes STMT 6	67,931.	0.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
22 Printing and publications					
23 Other expenses STMT 7	228.	0.	0.	0.	
24 Total operating and administrative expenses. Add lines 13 through 23	197,655.	65,170.	0.	0.	
25 Contributions, gifts, grants paid	1,120,500.			1,120,500.	
26 Total expenses and disbursements. Add lines 24 and 25	1,318,155.	65,170.	0.	1,120,500.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-410,865.				
b Net investment income (if negative, enter -0-)		815,604.			
c Adjusted net income (if negative enter -0-)			833,633.		

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LHA For Paperwork Reduction Act Notice, see instructions

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**THE MARION & NORMAN TANZMAN
CHARITABLE FOUNDATION**

22-3506061

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		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		896,149.	720,990.	720,990.
	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		618,000.		
	7	Other notes and loans receivable ▶	241,450.			
		Less: allowance for doubtful accounts ▶	0.	302,897.	241,450.	241,450.
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations	STMT 10	2,456,526.	1,974,733.	2,017,321.
	b	Investments - corporate stock	STMT 11	7,964,700.	8,389,780.	9,128,541.
	c	Investments - corporate bonds	STMT 12	518,057.	237,269.	240,139.
Liabilities	11	Investments - land, buildings, and equipment basis ▶				
		Less accumulated depreciation ▶				
	12	Investments - mortgage loans				
	13	Investments - other	STMT 13	8,764,877.	9,528,607.	9,904,714.
	14	Land, buildings, and equipment: basis ▶				
		Less accumulated depreciation ▶				
	15	Other assets (describe ▶)	STATEMENT 14)	198,583.	244,616.	244,616.
	16	Total assets (to be completed by all filers)		21,719,789.	21,337,445.	22,497,771.
Net Assets or Fund Balances	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				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		0.	0.	
	24	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>				
Net Assets or Fund Balances	25	Unrestricted				
	26	Temporarily restricted				
	27	Permanently restricted				
		Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>				
	28	Capital stock, trust principal, or current funds		0.	0.	
	29	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	30	Retained earnings, accumulated income, endowment, or other funds		21,719,789.	21,337,445.	
	31	Total net assets or fund balances		21,719,789.	21,337,445.	
Net Assets or Fund Balances	32	Total liabilities and net assets/fund balances		21,719,789.	21,337,445.	

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	21,719,789.
2	Enter amount from Part I, line 27a	2	-410,865.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	42,779.
4	Add lines 1, 2, and 3	4	21,351,703.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 9	5	14,258.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	21,337,445.

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			
b SEE ATTACHED STATEMENT			
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			
b			
c			
d			
e 7,225,466.		7,151,809.	73,657.

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			
b			
c			
d			
e			73,657.

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	73,657.
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). If (loss), enter -0- in Part I, line 8		3	47,199.

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	988,246.	20,684,159.	.047778
2010	986,109.	18,931,400.	.052089
2009	738,348.	15,874,491.	.046512
2008	1,088,102.	19,137,762.	.056856
2007	333,395.	8,042,886.	.041452

2 Total of line 1, column (d)	2	.244687
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	.048937
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	21,366,946.
5 Multiply line 4 by line 3	5	1,045,634.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	8,156.
7 Add lines 5 and 6	7	1,053,790.
8 Enter qualifying distributions from Part XII, line 4	8	1,120,500.

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.

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CHARITABLE FOUNDATION**

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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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	8,156.
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	8,156.
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	8,156.
6 Credits/Payments:			
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	6,800.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	1,400.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	8,200.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> 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	5.	
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 <input type="checkbox"/> Refunded <input checked="" type="checkbox"/>	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?		<input checked="" type="checkbox"/>
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for 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.		<input checked="" type="checkbox"/>
1c Did the foundation file Form 1120-POL for this year?		<input checked="" type="checkbox"/>
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 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.		<input checked="" type="checkbox"/>
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		<input checked="" type="checkbox"/>
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	<input checked="" type="checkbox"/>	
b If "Yes," has it filed a tax return on Form 990-T for this year?	<input checked="" type="checkbox"/>	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		<input checked="" type="checkbox"/>
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?		<input checked="" type="checkbox"/>
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.	<input checked="" type="checkbox"/>	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> NJ		
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	<input checked="" type="checkbox"/>	
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		<input checked="" type="checkbox"/>
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		<input checked="" type="checkbox"/>

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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? Website address ► <u>N/A</u>	13	X	
14 The books are in care of ► <u>BARBARA SOUSA, TRUSTEE</u> Telephone no. ► <u>732-750-5757</u> Located at ► <u>AS LISTED, WOODBRIDGE, NJ</u> ZIP+4 ► <u>07095</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	15	N/A	
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? 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 X

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

		Yes	No
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a During the year did the foundation (either directly or indirectly):			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? Organizations relying on a current notice regarding disaster assistance check here N/A ► <input type="checkbox"/>	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 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) N/A	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. ► _____			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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		X
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)?

☐ 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)?

N/A

5b

Organizations 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?

N/A

☐ 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

6b

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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?

N/A

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.

(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
SEE STATEMENT 15		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

**THE MARION & NORMAN TANZMAN
CHARITABLE FOUNDATION**

Part VIII

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

3 Five highest-paid independent contractors for professional services. 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 N/A	
2	
3	
4	

Part IX-B**Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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**THE MARION & NORMAN TANZMAN
CHARITABLE FOUNDATION**

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	20,855,070.
b	Average of monthly cash balances	1b	837,261.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	21,692,331.
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	21,692,331.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	325,385.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	21,366,946.
6	Minimum investment return. Enter 5% of line 5	6	1,068,347.

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	1,068,347.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	8,156.
b	Income tax for 2012. (This does not include the tax from Part VI.)	2b	7,865.
c	Add lines 2a and 2b	2c	16,021.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,052,326.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,052,326.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,052,326.

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	1,120,500.
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	1,120,500.
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	5	8,156.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,112,344.

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.

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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				1,052,326.
2 Undistributed income, if any, as of the end of 2012			0.	
a Enter amount for 2011 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2012				
a From 2007				
b From 2008	151,402.			
c From 2009				
d From 2010	75,951.			
e From 2011	23,967.			
f Total of lines 3a through e	251,320.			
4 Qualifying distributions for 2012 from Part XII, line 4: ► \$	1,120,500.			
a Applied to 2011, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2012 distributable amount				1,052,326.
e Remaining amount distributed out of corpus	68,174.			
5 Excess distributions carryover applied to 2012 (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:	319,494.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	319,494.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a	319,494.			
10 Analysis of line 9:				
a Excess from 2008	151,402.			
b Excess from 2009				
c Excess from 2010	75,951.			
d Excess from 2011	23,967.			
e Excess from 2012	68,174.			

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

N/A

1 a 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)

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

b 85% 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).)

NONE

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.

NONE

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:

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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				
200 CLUB OF MIDDLESEX COUNTY P.O BOX 387 WOODBIDGE, NJ 07095	NONE	EXEMPT	CHARITABLE	1,500.
ALEPH SOCIETY 25 WEST 45TH STREET NEW YORK, NY 10036	NONE	EXEMPT	CHARITABLE	1,000.
AMERICA'S VOICES, INC. 633 THIRD AVENUE 21ST FLOOR NEW YORK, NY 10017	NONE	EXEMPT	CHARITABLE	5,000.
AMERICAN CANCER SOCIETY 2600 US HIGHWAY #1 NORTH BRUNSWICK, NJ 08902	NONE	EXEMPT	CHARITABLE	12,000.
AMERICAN HEART ASSOCIATION 1 UNION STREET SUITE 301 ROBBINSVILLE, NJ 08691	NONE	EXEMPT	CHARITABLE	3,000.
Total SEE CONTINUATION SHEET(S) ▶ 3a				1,120,500.
b Approved for future payment				
AMERICAN SOCIETY FOR YAD VASHEM 500 FIFTH AVENUE 42ND FLOOR NEW YORK, NY 10110	NONE	EXEMPT	CHARITABLE	30,000.
CEREBRAL PALSY ASSOCIATION OF MIDDLESEX COUNTY 10 OAK DRIVE EDISON, NJ 08837	NONE	EXEMPT	CHARITABLE	400,000.
CHABAD HOUSE/FRIENDS LUBAVITCH-RUTGERS 170 COLLEGE AVENUE NEW BRUNSWICK, NJ 08902	NONE	EXEMPT	CHARITABLE	300,000.
Total SEE CONTINUATION SHEET(S) ▶ 3b				780,000.

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
AMERICAN JEWISH COMMITTEE 225 MILLBURN AVENUE, SUITE 305 MILLBURN, NJ 07041	NONE	EXEMPT	CHARITABLE	5,000.
AMERICAN SOCIETY FOR YAD VASHEM 500 FIFTH AVENUE 42ND FLOOR NEW YORK, NY 10110	NONE	EXEMPT	CHARITABLE	10,000.
ANTI-DEFAMATION LEAGUE 30A VREELAND AVENUE, SUITE 230 FLORHAM PARK, NJ 07932	NONE	EXEMPT	CHARITABLE	1,000.
ANSHE EMETH MEMORIAL TEMPLE 222 LIVINGSTON AVENUE NEW BRUNSWICK, NJ 08901	NONE	EXEMPT	CHARITABLE	5,000.
ASAP - ADULT SUBSTANCE ABUSE PROGRAM P.O. BOX 1481 HIGHLAND PARK, NJ 08904	NONE	EXEMPT	CHARITABLE	2,500.
BROWN UNIVERSITY P.O. BOX 1974 PROVIDENCE, RI 02912	NONE	EXEMPT	CHARITABLE	2,500.
CANCER INSTITUTE OF NEW JERSEY FOUNDATION 120 ALBANY STREET, TOWER TWO - 5TH FLOOR NEW BRUNSWICK, NJ 08901	NONE	EXEMPT	CHARITABLE	220,000.
CANCER SUPPORT COMMUNITY 613 HOPE ROAD EATONTOWN, NJ 07726	NONE	EXEMPT	CHARITABLE	5,000.
CEREBRAL PALSY ASSOCIATION OF MIDDLESEX COUNTY 10 OAK DRIVE EDISON, NJ 08837	NONE	EXEMPT	CHARITABLE	100,000.
CEREBRAL PALSY ASSOCIATION OF MIDDLESEX COUNTY 10 OAK DRIVE EDISON, NJ 08837	NONE	EXEMPT	CHARITABLE	7,500.
Total from continuation sheets				1,098,000.

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CEREBRAL PALSY ASSOCIATION OF MIDDLESEX COUNTY 10 OAK DRIVE EDISON, NJ 08837	NONE	EXEMPT	CHARITABLE	1,000.
CEREBRAL PALSY ASSOCIATION OF MIDDLESEX COUNTY 10 OAK DRIVE EDISON, NJ 08837	NONE	EXEMPT	CHARITABLE	200,000.
CHABAD HOUSE/FRIENDS LUBAVITCH-RUTGERS 170 COLLEGE AVENUE NEW BRUNSWICK, NJ 08902	NONE	EXEMPT	CHARITABLE	100,000.
CHABAD OF THE SHORE 620 OCEAN AVENUE LONG BRANCH, NJ 07740	NONE	EXEMPT	CHARITABLE	10,000.
CHILDREN'S DYSLEXIA CENTERS OF NEW JERSEY 102A LITTLE OXMEAD ROAD BURLINGTON, NJ 08016	NONE	EXEMPT	CHARITABLE	10,000.
CONGREGATION BETH HATIKVAH 36 CHATHAM ROAD SUMMIT, NJ 07901	NONE	EXEMPT	CHARITABLE	1,500.
CONGREGATION BROTHERS OF ISRAEL 250 PARK AVENUE ELBERON, NJ 07740	NONE	EXEMPT	CHARITABLE	5,000.
EDISON PUBLIC LIBRARY FOUNDATION 340 PLAINFIELD AVENUE EDISON, NJ 08817	NONE	EXEMPT	CHARITABLE	1,000.
HIGHLAND PARK CONSERVATIVE TEMPLE 201 SOUTH THIRD AVENUE HIGHLAND PARK, NJ 08904	NONE	EXEMPT	CHARITABLE	21,000.
HOPE LUTHERAN CHURCH 211 ELTON ADELPHIA ROAD FREEHOLD, NJ 07728	NONE	EXEMPT	CHARITABLE	1,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
JEWISH FEDERATION OF GREATER MIDDLESEX COUNTY 230 OLD BRIDGE TURNPIKE SOUTH RIVER, NJ 08882	NONE	EXEMPT	CHARITABLE	135,000.
JEWISH FEDERATION OF GREATER MONMOUTH COUNTY 100 U.S. HIGHWAY 9, SUITE 7 MANALAPAN, NJ 07723	NONE	EXEMPT	CHARITABLE	4,500.
JEWISH SOCIAL SERVICE COMMITTEE 58 HARRISON STREET HIGHLAND PARK, NJ 08904	NONE	EXEMPT	CHARITABLE	10,000.
LET'S GET READY 50 BROADWAY, 25TH FLOOR NEW YORK, NY 10004	NONE	EXEMPT	CHARITABLE	2,500.
LUNCH BREAK, INC. 121 DRS. JAMES PARKER BLVD. RED BANK, NJ 07701	NONE	EXEMPT	CHARITABLE	1,000.
MEMORIAL SLOAN KETTERING CANCER CENTER 633 THIRD AVENUE 28TH FLOOR NEW YORK, NY 10017	NONE	EXEMPT	CHARITABLE	10,000.
MIDDLESEX TORAH LINKS 4 CORNWALL DR. SUITE 100A EAST BRUNSWICK, NJ 08816	NONE	EXEMPT	CHARITABLE	10,000.
MONMOUTH UNIVERSITY 400 CEDAR AVENUE WEST LONG BRANCH, NJ 07764	NONE	EXEMPT	CHARITABLE	5,000.
MORGAN STANLEY CHILDREN'S HOSPITAL 654 WEST 170TH STREET NEW YORK, NY 10032	NONE	EXEMPT	CHARITABLE	3,500.
NEW BRUNSWICK TOMORROW 390 GEORGE STREET NEW BRUNSWICK, NJ 08901	NONE	EXEMPT	CHARITABLE	1,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PEF ISRAEL ENDOWMENT FUNDS, INC. - FRIENDS OF GALILEE HOSPITAL 315 MADISON AVENUE, SUITE 901 NEW YORK, NY 10017	NONE	EXEMPT	CHARITABLE	2,000.
PRE-COLLEGIATE LEARNING CENTER OF NEW JERSEY 85 S. ADELAIDE AVENUE HIGHLAND PARK, NJ 08904	NONE	EXEMPT	CHARITABLE	50,000.
RUTGERS HILLEL 93 COLLEGE AVENUE NEW BRUNSWICK, NJ 08901	NONE	EXEMPT	CHARITABLE	28,000.
RUTGERS UNIVERSITY 12 COLLEGE AVENUE, BILDNER CENTER NEW BRUNSWICK, NJ 08901	NONE	EXEMPT	CHARITABLE	100,000.
RWJ UNIVERSITY HOSPITAL FOUNDATION 10 PLUM STREET, SUITE 910 NEW BRUNSWICK, NJ 08901	NONE	EXEMPT	CHARITABLE	6,500.
ST. JAMES ROMAN CATHOLIC CHURCH 148 GREENVILLE STREET WOODBIDGE, NJ 07095	NONE	EXEMPT	CHARITABLE	7,500.
ST. JOSEPH'S SENIOR RESIDENCE 1 SAINT JOSPEH'S TERRACE WOODBIDGE, NJ 07095	NONE	EXEMPT	CHARITABLE	5,000.
ST. JUDE CHILDREN'S RESEARCH HOSPITAL 501 ST. JUDE PLACE MEMPHIS, TN 30105	NONE	EXEMPT	CHARITABLE	1,500.
THE SCHOOL FOR CHILDREN WITH HIDDEN INTELLIGENCE 812 E. COUNTY LINE ROAD LAKEWOOD, NJ 08701	NONE	EXEMPT	CHARITABLE	5,000.
UMDNJ NEW BRUNSWICK INTERPRETER PROGRAM 125 PATTERSON STREET NEW BRUNSWICK, NJ 08091	NONE	EXEMPT	CHARITABLE	1,000.
Total from continuation sheets				

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3 Grants and Contributions Approved for Future Payment (Continuation)

Total from continuation sheets

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
		14	800,130.	
		14	6,987.	
		18	73,657.	
	26,516.			
	26,516.		880,774.	0

13 907,290

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CONTINUATION FOR 990-PF, PART IV
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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.)
la RAYMOND JAMES COVERED SHORT TERM - SEE ATTACHED		P	VARIOUS	VARIOUS
b RAYMOND JAMES NONCOVERED SHORT TERM - SEE ATTACHED		P	VARIOUS	VARIOUS
c RAYMOND JAMES LONG TERM NONCOVERED - SEE ATTACHED		P	VARIOUS	VARIOUS
d BEACON TRUST SHORT TERM COVERED - SEE ATTACHED		P	VARIOUS	VARIOUS
e BEACON TRUST SHORT TERM NONCOVERED - SEE ATTACHED		P	VARIOUS	VARIOUS
f BEACON TRUST LONG TERM NONCOVERED - SEE ATTACHED		P	VARIOUS	VARIOUS
g CAPITAL GAINS DIVIDENDS				
h				
i				
j				
k				
l				
m				
n				
o				

(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 690,625.		646,591.	44,034.
b 928,123.		924,744.	3,379.
c 2,133,723.		2,187,682.	-53,959.
d 551,923.		539,787.	12,136.
e 2,167,627.		2,179,977.	-12,350.
f 714,628.		673,028.	41,600.
g 38,817.			38,817.
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(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			** 44,034.
b			** 3,379.
c			-53,959.
d			** 12,136.
e			** -12,350.
f			41,600.
g			38,817.
h			
i			
j			
k			
l			
m			
n			
o			

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	73,657.
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) If (loss), enter "-0-" in Part I, line 8	3	47,199.

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BEACON TRUST - DIVIDENDS	284,147.	944.	283,203.
BEACON TRUST - INTEREST INCOME	7,500.	0.	7,500.
J. SHEIN NOTE	21,834.	0.	21,834.
MORTGAGE - 516 ROUTE 35 LLC	10,688.	0.	10,688.
RAYMOND JAMES - ACCRUED INTEREST PAID	-6,659.	0.	-6,659.
RAYMOND JAMES - DIVIDEND INCOME	337,448.	37,873.	299,575.
RAYMOND JAMES - INTEREST INCOME	174,057.	0.	174,057.
RAYMOND JAMES - OID INCOME	9,932.	0.	9,932.
TOTAL TO FM 990-PF, PART I, LN 4	838,947.	38,817.	800,130.

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
SECURITIES CLASS ACTION LITIGATIONS	846.	846.	846.
MORGAN STANLEY OTHER INCOME	3,188.	3,188.	3,188.
DEFERRED INCOME PAYMENTS - PEEBLEBROOK HOTEL TRUST	2,953.	2,953.	2,953.
PASS THROUGH INCOME FROM TYRO, INC.	47,710.	0.	47,710.
PASS THROUGH LOSS FROM DISPLAY MATRIX CORPORATION	-750.	0.	-750.
PASS THROUGH LOSS FROM LINN ENERGY	-25,788.	0.	-25,788.
NET ROYALTY INCOME - BP PRUDHOE BAY RTY TR	5,344.	0.	5,344.
TOTAL TO FORM 990-PF, PART I, LINE 11	33,503.	6,987.	33,503.

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	600.	0.	0.	0.
TO FM 990-PF, PG 1, LN 16A	600.	0.	0.	0.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	10,550.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 16B	10,550.	0.	0.	0.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BROKER FEES	65,113.	65,113.	0.	0.
MANAGEMENT FEES	53,176.	0.	0.	0.
INVESTMENT EXPENSES - RAYMOND JAMES	57.	57.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	118,346.	65,170.	0.	0.

FORM 990-PF	TAXES		STATEMENT		6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL TAXES	64,018.	0.	0.	0.	
STATE OF NEW JERSEY	30.	0.	0.	0.	
FOREIGN INCOME TAXES	3,883.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	67,931.	0.	0.	0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MISCELLANEOUS	228.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 23	228.	0.	0.	0.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
DESCRIPTION		AMOUNT	
TAX EXEMPT INTEREST AND DIVIDEND INCOME		42,779.	
TOTAL TO FORM 990-PF, PART III, LINE 3		42,779.	

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	9
DESCRIPTION		AMOUNT	
			10.
CORRECTIONS IN OPENING SECURITY VALUE		14,248.	
TOTAL TO FORM 990-PF, PART III, LINE 5		14,258.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	10
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
MUNICIPAL BONDS - RAYMOND JAMES		X	1,974,733.	2,017,321.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			1,974,733.	2,017,321.
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,974,733.	2,017,321.

FORM 990-PF	CORPORATE STOCK	STATEMENT	11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITY SECURITIES - RAYMOND JAMES	4,418,290.	4,955,081.
EQUITY SECURITIES - BEACON TRUST	3,971,490.	4,173,460.
TOTAL TO FORM 990-PF, PART II, LINE 10B	8,389,780.	9,128,541.

FORM 990-PF	CORPORATE BONDS	STATEMENT	12
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS - RAYMOND JAMES	237,269.	240,139.
TOTAL TO FORM 990-PF, PART II, LINE 10C	237,269.	240,139.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	13
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME SECURITIES - BEACON TRUST	COST	6,658,125.	6,937,464.
MUTUAL FUNDS - BEACON TRUST	COST	0.	0.
MUTUAL FUNDS - RAYMOND JAMES	COST	1,768,852.	1,815,812.
UNIT INVESTMENT TRUSTS - RAYMOND JAMES	COST	269,183.	290,975.

PREFERRED SECURITIES - RAYMOND JAMES	COST	832,447.	860,463.
TOTAL TO FORM 990-PF, PART II, LINE 13		9,528,607.	9,904,714.

FORM 990-PF	OTHER ASSETS	STATEMENT	14
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS IN CLOSELY HELD ENTITIES	182,770.	229,730.	229,730.
DIVIDENDS RECEIVABLE	10,285.	14,886.	14,886.
MISCELLANEOUS RECEIVABLES	5,528.	0.	0.
TO FORM 990-PF, PART II, LINE 15	198,583.	244,616.	244,616.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	15
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JEFFRIES SHEIN 10 WOODBRIDGE CENTER DRIVE WOODBIDGE, NJ 07095	TRUSTEE 0.00	0.	0.	0.
BARBARA SOUSA 10 WOODBRIDGE CENTER DRIVE WOODBIDGE, NJ 07095	TRUSTEE 0.00	0.	0.	0.
JENNIFER TURNER 10 WOODBRIDGE CENTER DRIVE WOODBIDGE, NJ 07095	TRUSTEE 0.00	0.	0.	0.
JANICE BARSHAD 10 WOODBRIDGE CENTER DRIVE WOODBIDGE, NJ 07095	TRUSTEE 0.00	0.	0.	0.
SANDERS KLEINFELD 10 WOODBRIDGE CENTER DRIVE WOODBIDGE, NJ 07095	TRUSTEE 0.00	0.	0.	0.

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ROY H. TANZMAN	TRUSTEE			
4 TALIA ROAD	0.00	0.	0.	0.
KENDALL PARK, NJ 08824				

DRU KLEINFELD	TRUSTEE			
10 WOODBRIDGE CENTER DRIVE	0.00	0.	0.	0.
WOODBIDGE, NJ 07095				

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

0.	0.	0.
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FORM 990-PF

OTHER REVENUE

STATEMENT 16

DESCRIPTION	BUS CODE	UNRELATED BUSINESS INC	EXCL CODE	EXCLUDED AMOUNT	RELATED OR EXEMPT FUNC- TION INCOME
PASS THROUGH INCOME FROM TYRO, INC.	531390	47,710.			
PASS THROUGH LOSS FROM DISPLAY MATRIX CORPORATION	900099	-750.			
PASS THROUGH LOSS FROM LINN ENERGY	211110	-25,788.			
NET ROYALTY INCOME - BP PRUDHOE BAY RTY TR	211110	5,344.			
TOTAL TO FORM 990-PF, PG 12, LN 11		26,516.			

Marion and Norman Tanzman Charitable Foundation
Summary of Capital Gains and Losses
December 31, 2012

	Sales	
	Proceeds	Gain (loss)
Raymond James Account 52464991:		
Short-term Transactions - Covered	\$ 690,624.87	\$ 44,033.49
Short-term Transactions - Noncovered	928,122.84	3,378.58
Long-term Transactions - Covered	-	-
Long-term Transactions - Noncovered	2,133,722.83	(53,958.86)
Total Form 1099-B	3,752,470.54	(6,546.79)

Beacon Trust Account 610492019:		
Short-term Transactions - Covered	551,922.96	12,135.87
Short-term Transactions - Noncovered	2,167,627.09	(12,350.24)
Long-term Transactions - Covered	-	-
Long-term Transactions - Noncovered	714,628.16	41,600.02
Total Form 1099-B	3,434,178.21	41,385.65
Total	\$ 7,186,648.75	\$ 34,838.86

Raymond James & Associates, Inc. Account: 52464991
 2012 1099-B* Proceeds from Broker and Barter Exchange Transactions
 OMB No. 1545-0745

1c - SHORT-TERM TRANSACTIONS 6 - COVERED tax lot for which cost basis is reported to the IRS**

Report on Form 9949, Part I, with Box A checked

8 - Description / CUSIP / 1d - Symbol

1a - Date of Sale or exchange	1e - Quantity	2a - Proceeds of [#] stocks, bonds, etc.	1b - Date of acquisition	3 - Cost or other basis	Notes
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AMERICAN ELEC PWR INCORPORATED / CUSIP: 025537101 / Symbol: AEP

2 tax lots for 10/18/12. Total proceeds (and cost when required) reported to the IRS.

1,500.000	67,287.68	04/16/12	57,284.07	10,003.61	Sale
750.000	33,643.84	06/12/12	30,127.57	3,516.27	Sale
2,250.000	100,931.52	VARIOUS	87,411.64	13,519.88	Total of 2 lots

CENTURYLINK INCORPORATED / CUSIP: 156700106 / Symbol: CTL

08/21/12	2,500.000	103,056.89	06/12/12	94,269.96	8,786.93	Sale
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PUBLIC STORAGE PERPETUAL PFD / CUSIP: 74460D141 / Symbol: PSA.PRQ

3 tax lots for 07/26/12. Total proceeds (and cost when required) reported to the IRS.

3,850.000	107,694.42	10/06/11	100,228.24	7,466.18	Sale
1,150.000	32,168.46	10/17/11	29,961.30	2,207.16	Sale
2,700.000	75,751.41	10/17/11	70,343.93	5,407.48	Sale
7,700.000	215,614.29	VARIOUS	200,533.47	15,080.82	Total of 3 lots

US BANCORP PERPETUAL FIXED TO / CUSIP: 902973817 / Symbol: USB.PRN

07/17/12	7,700.000	211,925.96	04/23/12	197,865.94	14,060.02	Sale
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WINDSTREAM CORPORATION / CUSIP: 97381W104 / Symbol: WIN

01/30/12	5,000.000	59,096.21	07/07/11	66,480.37	-7,384.16	Sale
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Totals: 690,624.87

SHORT-TERM TRANSACTIONS 6 - NONCOVERED tax lot for which cost basis is NOT reported to the IRS**

Report on Form 9949, Part I, with Box B checked

8 - Description / CUSIP / 1d - Symbol

1a - Date of Sale or exchange	1e - Quantity	2a - Proceeds of [#] stocks, bonds, etc.	Date of acquisition	Cost or other basis	Gain or loss	Additional information	Notes
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BP PRUDHOE BAY RTV TR / CUSIP: 055630107 / Symbol: BPT

2 tax lots for 08/29/12. Total proceeds (and cost when required) reported to the IRS.

450.000	38,202.47	10/17/11	49,336.92	-11,134.45	Sale
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* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. Remember, taxpayers are ultimately responsible for the accuracy of their tax returns.

** For NONCOVERED lots, values for Date of acquisition, Cost or other basis and Wash sale loss disallowed are provided for your reference and are NOT reported to the IRS.

Less commissions.

Raymond James & Associates, Inc.		Account 52464991	
2012-1099-B		OMB No. 1545-0745	
Proceeds from Broker and Barter Exchange Transactions (continued)			

SHORT-TERM TRANSACTIONS 6 - NONCOVERED tax lot for which cost basis is NOT reported to the IRS**

Report on Form 8949, Part I, with Box B checked

8 - Description / CUSIP / 1d - Symbol

1a - Date of Sale or exchange	1b - Quantity	2a - Proceeds of stocks, bonds, etc.	3 - Date of acquisition	4 - Cost or other basis	5 - Gain/loss	6 - Additional information	7 - Notes
BP PRUDHOE BAY RTY TR / CUSIP: 055630107 / Symbol: BPT (cont'd)	400,000	33,957.75	02/28/12	49,376.95	-15,419.20	Sale	BP
08/29/12	850,000	72,160.22	VARIOUS	98,713.87	-26,553.65	Total of 2 lots	
COOK CNTY ILL GO AND GO REE / CUSIP: 213185EX5 / Symbol: 110,538.05	100,000,000		10/24/11	101,534.82	9,003.23	Sale	
05/21/12							
ENTERGY LOUISIANA, LLC 1ST MTG / CUSIP: 29364W306 / Symbol: ELB	3,650,000	101,441.88	10/17/11	100,709.52	732.36	Sale	
08/13/12							
HYATT HOTELS CORPORATION / CUSIP: 448579AD4 / Symbol:							
2 tax lots for 04/23/12. Total proceeds (and cost when required) reported to the IRS.							
04/23/12	100,000,000	107,362.52	10/17/11	102,478.19	4,884.33	Sale	
	100,000,000	107,362.53	11/03/11	103,134.96	4,227.57	Sale	
	200,000,000	214,725.05	VARIOUS	205,613.15	9,111.90	Total of 2 lots	
MAINE MUN BD BK, TAXABLE SCH / CUSIP: 56045RDF3 / Symbol:							
04/30/12	100,000,000	104,612.05	10/24/11	102,210.93	2,401.12	Sale	
NEW JERSEY ECONOMIC DEV AUTH M / CUSIP: 64576JAO8 / Symbol:							
05/21/12	10,000,000	11,030.94	10/13/11	10,299.23	781.71	Sale	
NEW YORK N Y, GO BDS, BUILD / CUSIP: 64966H4L1 / Symbol:							
03/30/12	105,000,000	114,599.40	10/21/11	112,124.77	2,474.63	Sale	
SIMON PROPERTY GROUP, L.P. / CUSIP: 828807CF2 / Symbol:							
01/12/12	89,000,000	93,832.20	10/18/11	91,588.47	2,243.73	Sale	
UNIVERSITY IL UNIV REVS, AUX / CUSIP: 914353XV4 / Symbol:							
03/08/12	100,000,000	105,133.05	07/07/11	101,949.50	3,183.55	Sale	
Totals:		928,122.84		924,744.26	3,378.58		

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** For NONCOVERED lots, values for Date of acquisition, Cost or other basis and Wash sale loss disallowed are provided for your reference and are NOT reported to the IRS.

Less commissions.

Raymond James & Associates, Inc.

Account 52464991

Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0745

(continued)

LONG-TERM TRANSACTIONS 6 - NONCOVERED tax lot for which cost basis is NOT reported to the IRS**

Report on Form 8949, Part II, with Box B checked

8 - Description / CUSIP / 1d - Symbol

1a - Date of Sale or exchange

1e - Quantity

2a - Proceeds of stocks, bonds, etc.

2b - Date of acquisition

2c - Cost or other basis

2d - Gain or loss

Additional information

Notes

ALCOA INC. / CUSIP: 013817AV3 / Symbol: 12/24/12

115,000.00

117,067.35

09/19/11

117,546.64

-479.29

Sale

CLARK CNTY NV SALES & EXCISE T / CUSIP: 181012BH7 / Symbol: 03/30/12

100,000.00

108,014.05

10/28/10

103,779.06

4,234.99

Sale

CLAYMORE ETF TRUST 2 / CUSIP: 18383Q879 / Symbol: CUT

2 tax lots for 02/02/12. Total proceeds (and cost when required) reported to the IRS.

4,150.00

75,168.63

01/03/08

100,286.68

-25,118.05

Sale

4,450.00

80,602.51

05/19/08

100,144.70

-19,542.19

Sale

8,600.00

155,771.14

VARIOUS

200,431.38

-44,660.24

Total of 2 lots

CLEVELAND OH ARPT SYS REV, A / CUSIP: 186352HY9 / Symbol: 01/03/12

5,000.00

5,000.00

09/15/09

5,018.73

-18.73

Redemption

DELGATH SYSTEMS INCORPORATED / CUSIP: 24661P104 / Symbol: DCTH 06/12/12

2,000.00

2,876.98

11/30/10

20,126.84

-17,249.86

Sale

DOMINION RESOURCES, / CUSIP: 25746U604 / Symbol: DRU

3 tax lots for 01/30/12. Total proceeds (and cost when required) reported to the IRS.

5,600.00

160,688.13

08/26/09

149,700.42

10,987.71

Sale

1,750.00

50,215.04

05/10/10

49,851.20

363.84

Sale

3,100.00

88,952.36

07/20/10

89,277.29

-324.93

Sale

10,450.00

299,855.53

VARIOUS

289,828.91

11,026.62

Total of 3 lots

DUKE ENERGY CORPORATION NEW / CUSIP: 26441C204 / Symbol: DUK 07/13/12

0.905

60.33

05/01/08

44.55

15.78

Sale

ENTERGY LOUISIANA, LLC 1ST MTG / CUSIP: 29364W306 / Symbol: ELB 08/13/12

3,650.00

101,441.89

10/04/10

100,443.99

997.90

Sale

FIRST TRUST TARGET GLOBAL DVD / CUSIP: 30271X106 / Symbol: FHUVEXG 04/04/12

10,183.00

100,543.86

01/10/11

99,924.98

618.90

Redemption

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**For NONCOVERED lots, values for Date of acquisition, Cost or other basis and Wash sale loss disallowed are provided for your reference and are NOT reported to the IRS.

Less commissions



52464991 - 004

Raymond James & Associates, Inc.

Account 52464991

Proceeds from Broker and Barter Exchange Transactions

CMB No. 1545-0745

LONG-TERM TRANSACTIONS 6 - NONCOVERED tax lot for which cost basis is NOT reported to the IRS**

Report on Form 8949, Part II, with Box B checked

8 - Description / CUSIP / 1d - Symbol

1a - Date of Sale

1b - Quantity

2a - Proceeds of

2b - Proceeds of

2c - Proceeds of

2d - Proceeds of

2e - Proceeds of

2f - Proceeds of

2g - Proceeds of

2h - Proceeds of

2i - Proceeds of

2j - Proceeds of

2k - Proceeds of

2l - Proceeds of

2m - Proceeds of

2n - Proceeds of

2o - Proceeds of

2p - Proceeds of

2q - Proceeds of

2r - Proceeds of

2s - Proceeds of

2t - Proceeds of

2u - Proceeds of

2v - Proceeds of

2w - Proceeds of

2x - Proceeds of

2y - Proceeds of

2z - Proceeds of

2aa - Proceeds of

2ab - Proceeds of

2ac - Proceeds of

2ad - Proceeds of

2ae - Proceeds of

2af - Proceeds of

2ag - Proceeds of

2ah - Proceeds of

2ai - Proceeds of

2aj - Proceeds of

2ak - Proceeds of

2al - Proceeds of

2am - Proceeds of

2an - Proceeds of

2ao - Proceeds of

2ap - Proceeds of

2aq - Proceeds of

2ar - Proceeds of

2as - Proceeds of

2at - Proceeds of

2au - Proceeds of

2av - Proceeds of

2aw - Proceeds of

2ax - Proceeds of

8 tax lots for 06/12/12. Total proceeds (and cost when required) reported to the IRS.

06/12/12	22,000	463.66	10/24/07	475.86	-12.20	Sale
	22,300	469.98	10/24/07	482.38	-12.40	Sale
	50,000	1,053.77	10/24/07	1,081.55	-27.78	Sale
	1,000,000	21,075.38	10/24/07	21,631.14	-555.76	Sale
	1,950,000	41,096.99	10/24/07	42,180.71	-1,083.72	Sale
	2,105,700	44,378.42	10/24/07	45,548.67	-1,170.25	Sale
	2,850,000	60,064.83	10/24/07	61,648.74	-1,583.91	Sale
	3,300,000	69,548.74	01/03/08	72,281.01	-2,732.27	Sale
	11,300,000	238,151.77	VARIOUS	245,330.06	-7,178.29	Total of 8 lots

GEORGIA POWER COMPANY SR NT / CUSIP: 373333465 / Symbol: GAROLD

2 tax lots for 07/16/12. Total proceeds (and cost when required) reported to the IRS.

07/16/12	3,800,000	95,000.00	10/27/09	100,337.46	-5,337.46	Redemption
	3,600,000	90,000.00	07/20/10	99,409.72	-9,409.72	Redemption
	7,400,000	185,000.00	VARIOUS	199,747.18	-14,747.18	Total of 2 lots

HILLSBOROUGH CNTY FL UTIL REF / CUSIP: 432347LJ9 / Symbol:

01/12/12	80,000,000	81,784.85	10/26/10	80,813.20	971.45	Sale
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KRAFT FOODS GROUP INCORPORATED / CUSIP: 50076Q106 / Symbol: KRFT

10/12/12	0.660	30.62	08/06/04	11.68	18.94	Sale
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MIAMI-DADE CNTY FL SPL OBLIG. / CUSIP: 593333NSB0 / Symbol:

05/21/12	50,000,000	54,717.05	11/22/10	51,685.60	3,031.45	Sale
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MIAMI FL REV, REF REV BDS, T / CUSIP: 593469BV0 / Symbol:

12/03/12	10,000,000	10,000.00	07/20/09	10,024.87	-24.87	Redemption
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NEW JERSEY ECONOMIC DEV AUTH M / CUSIP: 64578JQA9 / Symbol:

05/21/12	55,000,000	60,945.16	06/01/10	55,240.14	5,705.02	Sale
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NEW YORK N Y, GO BDS, BUILD / CUSIP: 64966HMU1 / Symbol:

03/30/12	100,000,000	108,649.05	10/21/10	104,018.82	4,630.23	Sale
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** For NONCOVERED lots, values for Date of acquisition, Cost or other basis and Wash sale loss disallowed are provided for your reference and are NOT reported to the IRS.

Less commissions

Raymond James & Associates, Inc.

Account 52464991

Proceeds from Broker and Barter Exchange Transactions

2012 1099-B*

(Continued)

OMB No. 1545-0045

LONG-TERM TRANSACTIONS 6 - NONCOVERED tax lot for which cost basis is NOT reported to the IRS**

Report on Form 8949, Part II, with Box B checked

8 - Description / CUSIP / 1d - Symbol

1a - Date of Sale

or exchange

1e - Quantity

2a - Proceeds of^e

stocks, bonds, etc.

FPL GROUP CAPITAL INCORPORATED / CUSIP: 65339K308 / Symbol: FGC

3 tax lots for 01/12/12. Total proceeds (and cost when required) reported to the IRS.

1a - Date of Sale or exchange	1e - Quantity	2a - Proceeds of ^e stocks, bonds, etc.	3 tax lots for 01/12/12. Total proceeds (and cost when required) reported to the IRS.	5 - Date of acquisition	6 - Cost or other basis	7 - Gain or loss	8 - Additional information	9 - Notes
	2,000.000	51,121.07	09/13/06	50,004.00	1,117.07	Sale		
	3,900.000	99,938.16	10/27/09	99,938.16	-252.06	Sale		
	1,200.000	30,672.64	04/01/10	31,493.07	-820.43	Sale		
01/12/12	7,100.000	181,479.81	VARIOUS	181,435.23	44.58	Total of 3 lots		

NEXTERA ENERGY CAPITAL PFD / CUSIP: 65339K506 / Symbol: NEE.PRF

03/15/12 4,300.000 119,947.97 07/20/10 125,439.57 -5,491.60 Sale

PORT AUTH NY & N J, CONSOLID / CUSIP: 73358TWK3 / Symbol:

11/01/12 45,000.000 45,000.00 08/05/10 45,000.00 0.00 Redemption

UNIVERSITY HI REV, REV BDS, / CUSIP: 91428LFP6 / Symbol:

03/08/12 100,000.000 105,944.05 10/04/10 102,115.19 3,828.86 Sale

WASHINGTON D C CONVENTION & SP / CUSIP: 93878LAN7 / Symbol:

03/08/12 50,000.000 51,441.55 10/26/10 50,675.07 766.48 Sale

Totals: 2,133,722.83

2,187,681.69

-53,958.86

* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. Remember, taxpayers are ultimately responsible for the accuracy of their tax returns.

** For NONCOVERED lots, values for Date of acquisition, Cost or other basis and Wash sale loss disallowed are provided for your reference and are NOT reported to the IRS.

Less commissions.



52464991 - 005

2012 Tax Information Statement

Page 7 of 21

Payer's Name and Address:
BEACON TRUST COMPANY
163 MADISON AVENUE, SUITE 600
MORRISTOWN, NJ 07960

Account Number: 610492019
Recipient's Tax ID Number: 22-3506061
Payer's Federal ID Number: 22-2853328
Payer's State ID Number: NJ
State: NJ

Recipient's Name and Address:
THE MARION & NORMAN TANZMAN
CHARITABLE FOUNDATION
10 WOODBRIDGE CENTER DR
WOODBIDGE, NJ 07095

☐ Corrected ☐ 2nd TIN notice

2012 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is Sales Price of stocks, bonds etc., less commissions and option premiums.
Covered (Box 6a is not checked)

Description (Box 2)		Quantity Sold (Box 1e)	Acquisition Date (Box 1a)	Acquisition Cost (Box 1b)	Stock or Bond Sales/Redemptions (Box 1d)	Wash Sale Losses Disallowed (Box 5)	Net Gain or Loss (Box 4)	Federal Income Tax (Box 15)
Short Term Sales Reported on 1099-B								
464288646	ISHARES TR BARCLAYS 1-3 YR CR BD FD				CSJ			
2024.0000	02/07/2012 01/06/2012			211,777.57	210,971.43	0.00	806.14	0.00
464288646	ISHARES TR BARCLAYS 1-3 YR CR BD FD				CSJ			
2173.0000	09/25/2012 Various			229,528.84	227,863.87	0.00	1,864.97	0.00
922908769	VANGUARD INDEX FDS VANGUARD TOTAL STK MKT ETF				VTI			
1531.0000	08/28/2012 10/28/2011			110,616.55	101,151.79	0.00	9,464.76	0.00
Total Short Term Sales Reported on 1099-B				551,922.96	539,787.09	0.00	12,135.87	0.00
Report on Form 8949, Part 1, with Box A checked								

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. The taxpayer is ultimately responsible for the accuracy of their own tax return.

2012 Tax Information Statement

Page 8 of 21

Account Number: 610492019
 Recipient's Tax ID Number: 22-3506061
 Payer's Federal ID Number: 22-2853328
 Payer's State ID Number: NJ
 State: ☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
 THE MARION & NORMAN TANZMAN
 CHARITABLE FOUNDATION
 10 WOODBRIDGE CENTER DR
 WOODBRIDGE, NJ 07095

Payer's Name and Address:
 BEACON TRUST COMPANY
 163 MADISON AVENUE, SUITE 600
 MORRISTOWN, NJ 07960

2012 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is Sales Price of stocks, bonds, etc., less commissions and option premiums.
 For noncovered securities (Box 6a is checked) shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the IRS.

Description (Box 1)		Date of Sale		Quantity		Sales Price		Cost Basis		Wash Sale Disallowed Loss		Net Capital Gain or Loss		Federal Income Tax		State Income Tax	
Symbol		Date of Sale		Quantity		Sales Price		Cost Basis		Wash Sale Disallowed Loss		Net Capital Gain or Loss		Federal Income Tax		State Income Tax	
Short Term Sales Reported on 1099-B																	
464287226		02/16/2012		09/16/2011		02/16/2012		09/16/2011		02/16/2012		09/16/2011		02/16/2012		09/16/2011	
9235.0000		02/16/2012		09/16/2011		02/16/2012		09/16/2011		02/16/2012		09/16/2011		02/16/2012		09/16/2011	
464288546		02/07/2012		09/19/2011		02/07/2012		09/19/2011		02/07/2012		09/19/2011		02/07/2012		09/19/2011	
1002.0000		02/07/2012		09/19/2011		02/07/2012		09/19/2011		02/07/2012		09/19/2011		02/07/2012		09/19/2011	
739361573		02/07/2012		09/19/2011		02/07/2012		09/19/2011		02/07/2012		09/19/2011		02/07/2012		09/19/2011	
23289.0000		02/07/2012		09/19/2011		02/07/2012		09/19/2011		02/07/2012		09/19/2011		02/07/2012		09/19/2011	
922042858		01/06/2012		12/12/2011		01/06/2012		12/12/2011		01/06/2012		12/12/2011		01/06/2012		12/12/2011	
2573.0000		01/06/2012		12/12/2011		01/06/2012		12/12/2011		01/06/2012		12/12/2011		01/06/2012		12/12/2011	
922042858		01/06/2012		12/12/2011		01/06/2012		12/12/2011		01/06/2012		12/12/2011		01/06/2012		12/12/2011	
2581.0000		01/06/2012		12/12/2011		01/06/2012		12/12/2011		01/06/2012		12/12/2011		01/06/2012		12/12/2011	
922908769		01/06/2012		10/28/2011		01/06/2012		10/28/2011		01/06/2012		10/28/2011		01/06/2012		10/28/2011	
1591.0000		01/06/2012		10/28/2011		01/06/2012		10/28/2011		01/06/2012		10/28/2011		01/06/2012		10/28/2011	
921943858		01/06/2012		10/28/2011		01/06/2012		10/28/2011		01/06/2012		10/28/2011		01/06/2012		10/28/2011	
3201.0000		01/06/2012		10/28/2011		01/06/2012		10/28/2011		01/06/2012		10/28/2011		01/06/2012		10/28/2011	

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. For noncovered securities shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the Internal Revenue Service. The taxpayer is ultimately responsible for the accuracy of the information reported.

2012 Tax Information Statement

Page 9 of 21

Account Number: 610492019
 Recipient's Tax ID Number: 22-3506061
 Payer's Federal ID Number: 22-2853328
 Payer's State ID Number: NJ
 State: ☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address:
 BEACON TRUST COMPANY
 163 MADISON AVENUE, SUITE 600
 MORRISTOWN, NJ 07960

Recipient's Name and Address:
 THE MARION & NORMAN TANZMAN
 CHARITABLE FOUNDATION
 10 WOODBRIDGE CENTER DR
 WOODBRIDGE, NJ 07095

For noncovered securities (Box 6a is checked) shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the IRS.

Quantity Sold	Description (Box 6a)	Date of Sale or Exchange	Date of Acquisition	Cost or Other Basis	Wash Sale Disallowed Loss	Federal Income	State Income
(Box 1e)	(Box 1a)	(Box 2a)	(Box 15)	(Box 4)	(Box 15)	(Box 4)	(Box 15)
Total Short Term Sales Reported on 1099-B							
Report on Form 8949, Part I, with Box B checked							
Long Term 15% Sales Reported on 1099-B							
40431AC83 HSBCK USA NA CTF DEP ZERO CPN DTD 07/31/2009 DUE							
250006 0088	07/31/2012	07/27/2009		250,000.00	0.00	0.00	0.00
714199106	PERMANENT PT			250,000.00	0.00	0.00	0.00
67,9710	03/12/2012	01/01/2010		3,313.59	0.00	0.00	0.00
714199106	PERMANENT PT			3,313.59	0.00	0.00	0.00
9238.3960	03/12/2012	11/29/2010		450,371.81	0.00	0.00	0.00
714199106	PERMANENT PT			450,371.81	0.00	0.00	0.00
224.4670	03/12/2012	11/30/2010		10,942.76	0.00	0.00	0.00
714199106	PERMANENT PT			10,942.76	0.00	0.00	0.00
Total Long Term 15% Sales Reported on 1099-B				714,628.16	0.00	0.00	0.00
Report on Form 8949, Part II, with Box B checked				714,628.16	0.00	0.00	0.00
Total Long Term 15% Sales Reported on 1099-B				714,628.16	0.00	0.00	0.00
Report on Form 8949, Part II, with Box B checked				714,628.16	0.00	0.00	0.00

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. For noncovered securities shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the Internal Revenue Service. The taxpayer is ultimately responsible for the accuracy of their own tax return.

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only

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

Type or print File by the due date for filing your return. See instructions	Name of exempt organization or other filer, see instructions THE MARION & NORMAN TANZMAN CHARITABLE FOUNDATION	Employer identification number (EIN) or 22-3506061
	Number, street, and room or suite no. If a P.O. box, see instructions P.O. BOX 1408	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions WOODBIDGE, NJ 07095	

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

04

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

BARBARA SOUSA, TRUSTEE

- The books are in the care of ► **AS LISTED - WOODBRIDGE, NJ 07095**

Telephone No. ► **732-750-5757**

FAX No. ►

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

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2013**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☒ calendar year **2012** or
► ☐ tax year beginning , and ending

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	8,200.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$	6,800.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	1,400.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

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

Form 8868 (Rev. 1-2013)