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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 01-01-2012 , and ending 12-31-2012

Name of foundation BLUE MOUNTAIN FOUNDATION		A Employer identification number 23-2586321	
Number and street (or P O box number if mail is not delivered to street address) 1330 BROADCASTING ROAD		B Telephone number (see instructions) (610) 376-1595	
City or town, state, and ZIP code WYOMISSING, PA 19610		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 753,916		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) <u> </u> (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)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	7,239	7,239		
	4 Dividends and interest from securities.	11,713	11,713		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	31,372			
	b Gross sales price for all assets on line 6a <u>182,849</u>				
	7 Capital gain net income (from Part IV , line 2)		31,372		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	50,324	50,324		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	8,200	6,150		2,050
	c Other professional fees (attach schedule)	2,683	2,683		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	786	0		0
	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	11,669	8,833		2,050
	25 Contributions, gifts, grants paid	47,500			47,500
	26 Total expenses and disbursements. Add lines 24 and 25	59,169	8,833		49,550
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-8,845			
	b Net investment income (if negative, enter -0-)		41,491		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	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	21,814	16,735	16,735
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)	92,178	☒ 106,632	113,972
	b	Investments—corporate stock (attach schedule)	410,306	☒ 407,354	531,390
	c	Investments—corporate bonds (attach schedule).	95,946	☒ 80,678	91,819
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	620,244	611,399	753,916

Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	

Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	620,244	611,399	
	30	Total net assets or fund balances (see page 17 of the instructions)	620,244	611,399	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	620,244	611,399	

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	620,244
2	Enter amount from Part I, line 27a	2	-8,845
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	611,399
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	611,399

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	VARIOUS SECURITIES	P		
b	LONG TERM CAPITAL GAIN DISTRIBUTION	P		
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 182,694		151,477	31,217
b 155			155
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			31,217
b			155
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	31,372
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2011	38,803	752,084	0 051594
2010	87,127	731,164	0 119162
2009	44,548	682,673	0 065255
2008	41,049	754,128	0 054432
2007	3,058	813,461	0 003759

2	Total of line 1, column (d).	2	0 294202
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 058840
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	762,907
5	Multiply line 4 by line 3.	5	44,889
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	415
7	Add lines 5 and 6.	7	45,304
8	Enter qualifying distributions from Part XII, line 4. 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	8	49,550

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

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	415
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	415
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	415
6		Credits/Payments			
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a	720	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c		
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments Add lines 6a through 6d.		7	720
8		Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	305
11		Enter the amount of line 10 to be Credited to 2013 estimated tax ☒ 305	Refunded ☐	11	0

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☒ \$ 0 (2) On foundation managers ☒ \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ PA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of REINSEL KUNTZ LESHER LLP Telephone no (610) 376-1595 Located at 1330 BROADCASTING ROAD WYOMISSING PA ZIP+4 19610			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 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		No
See 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	☐ Yes ☒ No ☐ Yes ☒ No ☒ Yes ☐ No ☐ Yes ☒ No ☐ Yes ☒ No ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.		1b	No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?		1c	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? If "Yes," list the years 20 , 20 , 20 , 20	☐ Yes ☒ No		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).		2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ 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	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?		4b	No

Part VII-B

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

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?		☐ Yes	☒ No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		☐ Yes	☒ No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		☐ Yes	☒ No	
(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see 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)?		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?				☐ 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?				
		6b		No
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?				
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?				☐ Yes ☒ No
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ANNE O MOLL	PRESIDENT	0	0	0
1330 BROADCASTING ROAD WYOMISSING, PA 19610	1 00			
THOMAS MOLL	VICE PRES	0	0	0
1330 BROADCASTING ROAD WYOMISSING, PA 19610	1 00			
THOMAS A BEAVER	SECRETARY -	0	0	0
1330 BROADCASTING ROAD WYOMISSING, PA 19610	TREASURER 1 00			
HAL LAVIN	ASSISTANT	0	0	0
1330 BROADCASTING ROAD WYOMISSING, PA 19610	SECRETARY 1 00			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

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

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	0

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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	743,170
b	Average of monthly cash balances.	1b	31,355
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	774,525
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	774,525
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	11,618
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	762,907
6	Minimum investment return. Enter 5% of line 5.	6	38,145

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	38,145
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	415
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	415
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	37,730
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	37,730
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	37,730

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	49,550
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	49,550
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	415
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	49,135
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				37,730
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2012				
a From 2007.				
b From 2008.				
c From 2009.				
d From 2010.				37,274
e From 2011.				905
f Total of lines 3a through e.	38,179			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 49,550				
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.				37,730
e Remaining amount distributed out of corpus	11,820			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	49,999			
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 instructions			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) (see instructions).	0			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a.	49,999			
10 Analysis of line 9				
a Excess from 2008.				
b Excess from 2009.				
c Excess from 2010.				37,274
d Excess from 2011.				905
e Excess from 2012.				11,820

Part XIV

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

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 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 organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (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

THOMAS A BEAVER CPA
1330 BROADCASTING ROAD
WYOMISSING, PA 19610
(610) 373-1565

b

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

WRITTEN

c

Any submission deadlines

NONE

d

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

AT MANAGERS' DISCRETION

Form 990-PF (2012)

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	47,500
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments. . . .					
3	Interest on savings and temporary cash investments			14	7,239	
4	Dividends and interest from securities. . . .			14	11,713	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory			18	31,372	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory. .					
11	Other revenue a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e). .		0		50,324	0
13	Total. Add line 12, columns (b), (d), and (e).			13	50,324	

[illegible]

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

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

b If "Yes," complete the following schedule

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

**Sign
Here**

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

*****	2013-03-07	*****	
Signature of officer or trustee	Date	Title	May the IRS discuss this return with the preparer shown below (see instr.)? ☒ Yes ☐ No

May the IRS discuss this return with the preparer shown below (see instr. 7)? ☒ **Yes** ☐ **No**

**Paid
Preparer
Use
Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☒	PTIN P00008293
	THOMAS E KAUFFMAN	THOMAS E KAUFFMAN			
	Firm's name ☐	REINSEL KUNTZ LESHER LLP		Firm's EIN ☐ 23-2108173	
		1330 BROADCASTING ROAD PO BOX 7008			
	Firm's address ☐	WYOMISSING, PA 196106008		Phone no (610) 376-1595	

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALBRIGHT COLLEGE 13TH BERN STREETS READING,PA 196125234	NONE	PUBLIC	GENERAL FUND	1,500
AMERICAN RED CROSS 701 CENTRE AVENUE READING,PA 19601	NONE	PUBLIC	GENERAL FUNDGENERAL FUND	1,500
ANOTHER CHANCE FOR HORSES 166 STATION ROAD BERNVILLE,PA 19506	NONE	PUBLIC	GENERAL FUNDGENERAL FUND	1,000
BERKS COUNTY ASSOCIATION FOR THE BLIND 2020 HAMPDEN BLVD READING,PA 19604	NONE	PUBLIC	GENERAL FUND	1,000
BERKS DEAF AND HARD OF HEARING SERVICES 2045 CENTRE AVENUE READING,PA 19605	NONE	PUBLIC	GENERAL FUND	1,000
BERKS ENCORE 40 NORTH NINTH STREET READING,PA 19601	NONE	PUBLIC	GENERAL FUND	2,000
BERKS TALKLINE PO BOX 13234 READING,PA 196123234	NONE	PUBLIC	GENERAL FUND	1,500
BERKS WOMEN IN CRISIS 255 CHESTNUT STREET READING,PA 19602	NONE	PUBLIC	GENERAL FUND	1,000
CO COUNTY WELLNESS SERVICES 429 WALNUT STREET READING,PA 196038626	NONE	PUBLIC	GENERAL FUND	2,000
EASY DOES IT INC 1300 HILLTOP ROAD LEESPORT,PA 19533	NONE	PUBLIC	GENERAL FUND	1,000
HAWK MOUNTAIN COUNCIL BSA 5027 POTTSVILLE PIKE READING,PA 19605	NONE	PUBLIC	GENERAL FUND	1,000
JOHN PAUL II CENTER FOR SPECIAL LEARNING 1092 WELSH ROAD READING,PA 19607	NONE	PUBLIC	GENERAL FUND	1,000
LITERACY COUNCIL OF READING-BERKS 35 S DWIGHT STREET READING,PA 19609	NONE	PUBLIC	GENERAL FUND	500
OLIVET BOYS AND GIRLS CLUB OF READING & BERKS COUNTY 1161 PERSHING BLVD READING,PA 19611	NONE	PUBLIC	GENERAL FUND	1,500
OPPORTUNITY HOUSE 430 N 2ND STREET READING,PA 19601	NONE	PUBLIC	GENERAL FUND	1,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PLANNED PARENTHOOD OF THE NORTHEAST AND MID-PENN 48 S 4TH STREET READING,PA 19602	NONE	PUBLIC	GENERAL FUND	1,000
POP CORN PARK REFUGE PO BOX 43 FORKED RIVER,NJ 087310043	NONE	PUBLIC	GENERAL FUND	1,500
READING MUSICAL FOUNDATION PO BOX 14835 READING,PA 196124835	NONE	PUBLIC	GENERAL FUND	500
SALVATION ARMY 301 S 5TH STREET READING,PA 196030316	NONE	PUBLIC	GENERAL FUND	2,000
SOUTH MOUNTAIN YMCA PO BOX 147 WERNERSVILLE,PA 19565	NONE	PUBLIC	GENERAL FUND	1,000
ST JOSEPH'S MEDICAL CENTER FOUNDATION PO BOX 316 READING,PA 196030316	NONE	PUBLIC	GENERAL FUND	1,500
TEEN CHALLENGE TRAINING CENTER INC PO BOX 98 REHRERSBURG,PA 19550	NONE	PUBLIC	GENERAL FUND	1,000
THE GREATER BERKS FOOD BANK 1011 TUCKERTON COURT READING,PA 19605	NONE	PUBLIC	GENERAL FUND	2,000
UNITED WAY OF BERKS COUNTY 501 WASHINGTON STREET READING,PA 196030702	NONE	PUBLIC	GENERAL FUND	1,000
WYOMISSING PUBLIC LIBRARY 9 READING BOULEVARD WYOMISSING,PA 19610	NONE	PUBLIC	GENERAL FUND	1,000
BERKS CATHOLIC HIGH SCHOOL 955 E WYOMISSING BOULEVARD READING,PA 19611	NONE	PUBLIC	GENERAL FUND	10,500
OLIVET BOYS AND GIRLS CLUB OF READING & BERKS COUNTY 1161 PERSHING BLVD READING,PA 19601	NONE	PUBLIC	CAPITAL CAMPAIGN	4,000
RED CREEK WILDLIFE CENTER 30 MOONHILL DRIVE SCHUYLKILL HAVEN,PA 17972	NONE	PUBLIC	GENERAL FUND	2,000
Total  3a				47,500

TY 2012 Accounting Fees Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REINSEL KUNTZ LESHER -TAX SERVICE	8,200	6,150		2,050

**TY 2012 Investments Corporate
Bonds Schedule****Name:** BLUE MOUNTAIN FOUNDATION**EIN:** 23-2586321

Name of Bond	End of Year Book Value	End of Year Fair Market Value
5,000 UNITS IBM DTD 9/14/07	5,173	6,038
15,000 UNITS SBC COMMUNICATIONS DTD 8/18/04	14,164	17,217
5,000 UNITS GLAXOSMITH CAP DTD 5/13/08	5,124	6,090
5,000 UNITS WAL-MART DTD 4/5/07	5,247	5,919
5,000 UNITS CONSOLIDATED EDISON DTD 4/1/08	5,167	6,086
5,000 UNITS COSTCO DTD 2/20/07	5,168	5,895
5,000 UNITS JP MORGAN CHASE & CO DTD 1/29/08	5,339	6,265
5,000 UNITS PEPSICO INC DTD 10/26/10 3.125% 11/01/2020	4,904	5,358
5,000 UNITS US BANCORP DTD 07/27/2010 2.45% 7/27/2015	5,033	5,226
5,000 SHS BANK OF NY MELLON BK DTD 9/23/11	5,064	5,448
5,000 SHS GENERAL ELECTRIC CAP CORP DTD 1/7/11 4.625%	5,221	5,672
5,000 UNITS MERCK & CO INC DTD 12/10/10 3.875%	4,909	5,611
5,000 UNITS OCCIDENTAL PETROLEUM CORP DTD 12/16/10	5,018	5,717
5,000 WELLS FARGO CO DTD 12/12/11 2.625% 12/15/2016	5,147	5,277

TY 2012 Investments Corporate

Stock Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Name of Stock	End of Year Book Value	End of Year Fair Market Value
225 SHS A T & T	4,514	7,585
120 SHS EXXON MOBIL CORP	1,665	10,386
180 SHS JOHNSON & JOHNSON	8,628	12,618
409 SHS MICROSOFT CORP COM	10,463	10,924
45 SHS VF CORPORATION	1,727	6,794
1297.506 SHS CONESTOGA SMALL CAP	26,794	32,412
105 SHS AMGEN INC	5,805	9,051
110 SHS CHEVRON	8,491	11,895
120 SHS DARDEN RESTAURANTS INC	2,805	5,408
220 SHS MCGRAW HILL COS INC	7,430	12,027
345 SHS ORACLE CORP	6,481	11,495
140 SHS PEPSICO INC	8,606	9,580
350 SHS PFIZER INC	6,793	8,778
145 SHS QUALCOMM INC	6,670	8,970
95 SHS UNITED TECHNOLOGIES	5,083	7,791
20 SHS APPLE	1,858	10,643
210 SHS MCCORMICK & COMPANY INC	7,816	13,341
92 SHS AMETEK INC	1,423	3,456
25 SHS BMC SOFTWARE	644	991
20 SHS FACTSET RESEARCH	1,120	1,761
25 SHS HARRIS CORP	924	1,224
50 SHS HORMEL FOODS	847	1,561
20 SHS L-3 COMMUNICATIONS HOLDINGS COM	1,293	1,532
40 SHS ROSS STORES	631	2,164
50 SHS TORO CO	928	2,149
25 SHS TUPPERWARE	560	1,603
225 SHS WALGREEN CO	5,340	8,327
55 SHS BROADRIDGE FINL SOL	674	1,258
60 SHS LABORATORY CRP	3,756	5,197
20 SHS HUBBELL INC	642	1,693

Name of Stock	End of Year Book Value	End of Year Fair Market Value
40 SHS COPART INC	598	1,180
25 SHS PERRIGO CO COM	564	2,601
65 SHS INTERNATIONAL BUS MACHS CORP	6,660	12,451
20 SHS WESTERN DIGITAL CORP	485	850
105 SHS C H ROBINSON WORLDWIDE	5,907	6,638
37 SHS ROLLINS INC	420	815
105 SHS MCKESSON HBOC INC COM	6,112	10,181
190 SHS GENERAL MILLS INC	6,464	7,680
45 SHS BOB EVANS FARMS COM	1,495	1,809
15 SHS PANERA BREAD COMPANY	1,102	2,382
33 SHS JOHN WILEY & SONS INC	1,429	1,285
35 SHS WORLD FUEL SERVICES CORP	1,003	1,441
50 SHS AMERICAN FINCL GROUP INC COM	1,299	1,976
1469.67 SHS ARTISAN INTERNATIONAL FD	32,336	36,139
6,234.097 SHS GOLDMAN SACHS SATELLITE STRATEGIES	49,000	51,182
20 SHS CUBIC CORP COM	790	959
25 SHS ADVANCE AUTO PARTS INC	1,576	1,809
260 SHS TJX COMPANIES INC	6,602	11,037
35 SHS CHURCH & DWIGHT CO INC	1,441	1,875
75 SHS COLGATE PALMOLIVE CO INC	6,676	7,841
65 SHS DIAMOND OFFSHORE DRILLING COM	4,667	4,417
37 SHS COMMERCE BANCSHARES INC COM	1,312	1,297
275 SHS DISCOVER FINANCIAL SERVICES COM	7,382	10,601
135 SHS FULTON FINANCIAL CORP COM	1,299	1,297
35 SHS ARTHUR J GALLAGHER & CO	1,123	1,213
110 SHS BAXTER INTL INC COM	6,618	7,333
20 SHS COOPER COS INC/THE COM	1,402	1,850
10 SHS WATSCO INC COM	653	749
40 SHS J2 GLOBAL INC	977	1,224
1743.119 SHS HENDERSON INTERNATIONAL OPPORTUNITIES FUND	33,181	37,338

Name of Stock	End of Year Book Value	End of Year Fair Market Value
35 SHS APTARGROUP INC.COM	1,812	1,670
205 SHS BALL CORP	7,564	9,174
40 SHS VALSPAR CORP	1,530	2,496
65 SHS VECTREN CORPORATION COM	1,826	1,911
160 SHS WISCONSIN ENERGY CORP COM	4,807	5,896
30 SHS CARTER'S INC	1,701	1,670
20 SHS OCEANEERING INTL INC	1,041	1,076
45 SHS FLOWSERVE CORP COM	5,793	6,606
50 SHS PARKER-HANNIFIN CORP.COM	4,345	4,253
105 SHS RAYTHEON CO COM	5,936	6,042
270 SHS MARSH & MCLENNAN CO COM	9,268	9,307
35 SHS RAYONIER INC COM	1,501	1,814
295 SHS U S BANCORP COM	9,373	9,422
30 SHS WADDELL & REED FIN INC	1,172	1,045
45 SHS CHARLES RIVER LABS INTL IN	1,583	1,686
30 SHS CUBIST PHARMACEUTICAL INC	1,414	1,262
35 SHS OMNICARE INC COM	1,196	1,264
130 SHS CADENCE DESIGN SYSTEMS INC	1,678	1,756
65 SHS CORELOGIC INC COM	1,665	1,750
370 SHS INTEL CORP COM	9,786	7,629
40 SHS MINERALS TECHNOLOGIES INC	1,379	1,597

TY 2012 Investments Government Obligations Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

US Government Securities - End of Year Book Value:	106,632
US Government Securities - End of Year Fair Market Value:	113,972
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2012 Other Professional Fees Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK MANAGEMENT FEES	2,683	2,683		0

TY 2012 Taxes Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	786	0		0