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

**2012**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2012 or tax year beginning , 2012, and ending , 20

|                                                                                                                                                                                                                                                          |                                                                                                                                                                                                       |                                                                                                                                                                                     |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of foundation<br><b>BOZZONE FAMILY FOUNDATION</b>                                                                                                                                                                                                   |                                                                                                                                                                                                       | <b>A Employer identification number</b><br>25-6277066                                                                                                                               |
| Number and street (or P O box number if mail is not delivered to street address)<br>C/O ECKMAN & DANOVITZ LLC<br>1001 LIBERTY AVE 11TH FLOOR                                                                                                             |                                                                                                                                                                                                       | <b>B Telephone number (see instructions)</b><br>(412) 355-8100                                                                                                                      |
| City or town, state, and ZIP code<br>PITTSBURGH, PA 15222                                                                                                                                                                                                |                                                                                                                                                                                                       | <b>C</b> If exemption application is pending, check here <input type="checkbox"/>                                                                                                   |
| <b>G</b> Check all that apply                                                                                                                                                                                                                            | <input type="checkbox"/> Initial return<br><input type="checkbox"/> Final return<br><input type="checkbox"/> Address change                                                                           | <b>D</b> 1. Foreign organizations, check here <input type="checkbox"/><br>2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| <b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation |                                                                                                                                                                                                       | <b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>                                                                |
| <b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 6,061,221.                                                                                                                                                | <b>J</b> Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____<br>(Part I, column (d) must be on cash basis.) | <b>F</b> 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) (see instructions)) |                                                                                   | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| 1                                                                                                                                                                  | Contributions, gifts, grants, etc., received (attach schedule)                    | 1,511,163.                         |                           |                         |                                                             |
| 2                                                                                                                                                                  | Check <input type="checkbox"/> if the foundation is not required to attach Sch. B |                                    |                           |                         |                                                             |
| 3                                                                                                                                                                  | Interest on savings and temporary cash investments                                | 2,000.                             | 2,000.                    |                         | ATCH 1                                                      |
| 4                                                                                                                                                                  | Dividends and interest from securities                                            | 94,729.                            | 94,729.                   |                         | ATCH 2                                                      |
| 5a                                                                                                                                                                 | Gross rents                                                                       |                                    |                           |                         |                                                             |
| b                                                                                                                                                                  | Net rental income or (loss)                                                       |                                    |                           |                         |                                                             |
| 6a                                                                                                                                                                 | Net gain or (loss) from sale of assets not on line 10                             | 794,907.                           |                           |                         |                                                             |
| b                                                                                                                                                                  | Gross sales price for all assets on line 6a 2,102,673.                            |                                    | 789,963.                  |                         |                                                             |
| 7                                                                                                                                                                  | Capital gain net income (from Part IV, line 2)                                    |                                    |                           |                         |                                                             |
| 8                                                                                                                                                                  | Net short-term capital gain                                                       |                                    |                           |                         |                                                             |
| 9                                                                                                                                                                  | Income modifications                                                              |                                    |                           |                         |                                                             |
| 10a                                                                                                                                                                | Gross sales less returns and allowances                                           |                                    |                           |                         |                                                             |
| b                                                                                                                                                                  | Less Cost of goods sold                                                           |                                    |                           |                         |                                                             |
| c                                                                                                                                                                  | Gross profit or (loss) (attach schedule)                                          |                                    |                           |                         |                                                             |
| 11                                                                                                                                                                 | Other income (attach schedule) ATCH 3                                             | -2,211.                            | -2,211.                   |                         |                                                             |
| 12                                                                                                                                                                 | <b>Total. Add lines 1 through 11</b>                                              | 2,400,588.                         | 884,481.                  |                         |                                                             |
| 13                                                                                                                                                                 | Compensation of officers, directors, trustees, etc.                               | 0                                  |                           |                         |                                                             |
| 14                                                                                                                                                                 | Other employee salaries and wages                                                 |                                    |                           |                         |                                                             |
| 15                                                                                                                                                                 | Pension plans, employee benefits                                                  |                                    |                           |                         |                                                             |
| 16a                                                                                                                                                                | Legal fees (attach schedule)                                                      |                                    |                           |                         |                                                             |
| b                                                                                                                                                                  | Accounting fees (attach schedule) ATCH 4                                          | 3,850.                             |                           |                         |                                                             |
| c                                                                                                                                                                  | Other professional fees (attach schedule)                                         |                                    |                           |                         |                                                             |
| 17                                                                                                                                                                 | Interest ATCH 5                                                                   | 23.                                | 23.                       |                         |                                                             |
| 18                                                                                                                                                                 | Taxes (attach schedule) (see instructions) ATCH 6                                 | 5,671.                             | 5,465.                    |                         |                                                             |
| 19                                                                                                                                                                 | Depreciation (attach schedule) and depletion                                      |                                    |                           |                         |                                                             |
| 20                                                                                                                                                                 | Occupancy                                                                         |                                    |                           |                         |                                                             |
| 21                                                                                                                                                                 | Travel, conferences, and meetings                                                 |                                    |                           |                         |                                                             |
| 22                                                                                                                                                                 | Printing and publications                                                         |                                    |                           |                         |                                                             |
| 23                                                                                                                                                                 | Other expenses (attach schedule) ATCH 7                                           | 23,823.                            | 23,823.                   |                         |                                                             |
| 24                                                                                                                                                                 | <b>Total operating and administrative expenses. Add lines 13 through 23</b>       | 33,367.                            | 29,311.                   |                         |                                                             |
| 25                                                                                                                                                                 | Contributions, gifts, grants paid                                                 | 1,100,813.                         |                           |                         | 1,100,813.                                                  |
| 26                                                                                                                                                                 | <b>Total expenses and disbursements. Add lines 24 and 25</b>                      | 1,134,180.                         | 29,311.                   | 0                       | 1,100,813.                                                  |
| 27                                                                                                                                                                 | Subtract line 26 from line 12                                                     | 1,266,408.                         |                           |                         |                                                             |
| a                                                                                                                                                                  | Excess of revenue over expenses and disbursements                                 |                                    | 855,170.                  |                         |                                                             |
| b                                                                                                                                                                  | Net investment income (if negative, enter -0-)                                    |                                    |                           |                         |                                                             |
| c                                                                                                                                                                  | <b>Adjusted net income (if negative, enter -0-)</b>                               |                                    |                           |                         |                                                             |

SCANNED NOV 07 2013

Operating and Administrative Expenses

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**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 |
| <b>Assets</b>                                                                                                    | 1 Cash - non-interest-bearing . . . . .                                                                                                        |                   |                |                       |
|                                                                                                                  | 2 Savings and temporary cash investments . . . . .                                                                                             | 82,260.           | 1,249,127.     | 1,249,127.            |
|                                                                                                                  | 3 Accounts receivable ▶<br>Less: allowance for doubtful accounts ▶                                                                             |                   |                |                       |
|                                                                                                                  | 4 Pledges receivable ▶<br>Less: allowance for doubtful accounts ▶                                                                              |                   |                |                       |
|                                                                                                                  | 5 Grants receivable . . . . .                                                                                                                  |                   |                |                       |
|                                                                                                                  | 6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . .              |                   |                |                       |
|                                                                                                                  | 7 Other notes and loans receivable (attach schedule) ▶<br>Less: allowance for doubtful accounts ▶                                              |                   |                |                       |
|                                                                                                                  | 8 Inventories for sale or use . . . . .                                                                                                        |                   |                |                       |
|                                                                                                                  | 9 Prepaid expenses and deferred charges . . . . .                                                                                              |                   |                |                       |
|                                                                                                                  | 10 a Investments - U S and state government obligations (attach schedule) .                                                                    |                   |                |                       |
|                                                                                                                  | b Investments - corporate stock (attach schedule) <b>ATCH 8</b> . . . .                                                                        | 4,313,786.        | 3,800,821.     | 4,812,094.            |
|                                                                                                                  | c Investments - corporate bonds (attach schedule) . . . . .                                                                                    |                   |                |                       |
|                                                                                                                  | 11 Investments - land, buildings, and equipment basis<br>Less: accumulated depreciation (attach schedule) ▶                                    |                   |                |                       |
|                                                                                                                  | 12 Investments - mortgage loans . . . . .                                                                                                      |                   |                |                       |
|                                                                                                                  | 13 Investments - other (attach schedule) . . . . .                                                                                             |                   |                |                       |
|                                                                                                                  | 14 Land, buildings, and equipment basis<br>Less: accumulated depreciation (attach schedule) ▶                                                  |                   |                |                       |
| 15 Other assets (describe ▶) . . . . .                                                                           |                                                                                                                                                |                   |                |                       |
| 16 <b>Total assets</b> (to be completed by all filers - see the instructions Also, see page 1, item I) . . . . . | 4,396,046.                                                                                                                                     | 5,049,948.        | 6,061,221.     |                       |
| <b>Liabilities</b>                                                                                               | 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 <b>Total liabilities</b> (add lines 17 through 22) . . . . .                                                  | 0                                                                                                                                              | 0                 |                |                       |
| <b>Net Assets or Fund Balances</b>                                                                               | <b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/><br><b>and complete lines 24 through 26 and lines 30 and 31.</b> |                   |                |                       |
|                                                                                                                  | 24 Unrestricted . . . . .                                                                                                                      |                   |                |                       |
|                                                                                                                  | 25 Temporarily restricted . . . . .                                                                                                            |                   |                |                       |
|                                                                                                                  | 26 Permanently restricted . . . . .                                                                                                            |                   |                |                       |
|                                                                                                                  | <b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b> ▶ <input checked="" type="checkbox"/> <b>X</b>    |                   |                |                       |
|                                                                                                                  | 27 Capital stock, trust principal, or current funds . . . . .                                                                                  | 4,396,046.        | 5,049,948.     |                       |
|                                                                                                                  | 28 Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .                                                                     |                   |                |                       |
|                                                                                                                  | 29 Retained earnings, accumulated income, endowment, or other funds . .                                                                        |                   |                |                       |
|                                                                                                                  | 30 <b>Total net assets or fund balances</b> (see instructions) . . . . .                                                                       | 4,396,046.        | 5,049,948.     |                       |
|                                                                                                                  | 31 <b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .                                                          | 4,396,046.        | 5,049,948.     |                       |

**Part III Analysis of Changes in Net Assets or Fund Balances**

|                                                                                                                                                                        |   |            |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|------------|
| 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) . . . . . | 1 | 4,396,046. |
| 2 Enter amount from Part I, line 27a . . . . .                                                                                                                         | 2 | 1,266,408. |
| 3 Other increases not included in line 2 (itemize) ▶                                                                                                                   | 3 |            |
| 4 Add lines 1, 2, and 3 . . . . .                                                                                                                                      | 4 | 5,662,454. |
| 5 Decreases not included in line 2 (itemize) ▶ <b>ATCH 9</b>                                                                                                           | 5 | 612,506.   |
| 6 <b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30 . . . . .                                               | 6 | 5,049,948. |

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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<br>P - Purchase<br>D - Donation                                             | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------------------------------------------------------|--------------------------------------|----------------------------------|
| <b>1a</b> SEE PART IV SCHEDULE                                                                                                                                                                            |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>b</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>c</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>d</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>e</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| (e) Gross sales price                                                                                                                                                                                     | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g)                                                 |                                      |                                  |
| <b>a</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>b</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>c</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>d</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>e</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69                                                                                                               |                                            |                                                 |                                                                                              |                                      |                                  |
| (i) F M V as of 12/31/69                                                                                                                                                                                  | (j) Adjusted basis<br>as of 12/31/69       | (k) Excess of col (i)<br>over col (j), if any   | (l) Gains (Col (h) gain minus<br>col (k), but not less than -0-) or<br>Losses (from col (h)) |                                      |                                  |
| <b>a</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>b</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>c</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>d</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>e</b>                                                                                                                                                                                                  |                                            |                                                 |                                                                                              |                                      |                                  |
| <b>2</b> Capital gain net income or (net capital loss)<br>{ If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 }                                                             |                                            |                                                 | <b>2</b>                                                                                     | 789,963.                             |                                  |
| <b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in<br>Part I, line 8 |                                            |                                                 | <b>3</b>                                                                                     | 0                                    |                                  |

**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)<br>Base period years<br>Calendar year (or tax year beginning in)                                                                                                                                                       | (b)<br>Adjusted qualifying distributions | (c)<br>Net value of noncharitable-use assets | (d)<br>Distribution ratio<br>(col (b) divided by col (c)) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|----------------------------------------------|-----------------------------------------------------------|
| 2011                                                                                                                                                                                                                       | 1,092,601.                               | 5,879,576.                                   | 0.185830                                                  |
| 2010                                                                                                                                                                                                                       | 1,213,668.                               | 6,328,710.                                   | 0.191772                                                  |
| 2009                                                                                                                                                                                                                       | 1,652,200.                               | 6,741,660.                                   | 0.245073                                                  |
| 2008                                                                                                                                                                                                                       | 1,324,017.                               | 8,154,131.                                   | 0.162374                                                  |
| 2007                                                                                                                                                                                                                       | 1,853,620.                               | 10,797,731.                                  | 0.171668                                                  |
| <b>2</b> Total of line 1, column (d)                                                                                                                                                                                       |                                          |                                              | <b>2</b> 0.956717                                         |
| <b>3</b> 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                                      |                                          |                                              | <b>3</b> 0.191343                                         |
| <b>4</b> Enter the net value of noncharitable-use assets for 2012 from Part X, line 5                                                                                                                                      |                                          |                                              | <b>4</b> 5,102,015.                                       |
| <b>5</b> Multiply line 4 by line 3                                                                                                                                                                                         |                                          |                                              | <b>5</b> 976,235.                                         |
| <b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                                                        |                                          |                                              | <b>6</b> 8,552.                                           |
| <b>7</b> Add lines 5 and 6                                                                                                                                                                                                 |                                          |                                              | <b>7</b> 984,787.                                         |
| <b>8</b> Enter qualifying distributions from Part XII, line 4<br>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 |                                          |                                              | <b>8</b> 1,100,813.                                       |

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

|                                                                                                                                                                                                                                                   |    |        |        |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|--------|--------|
| 1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 . . . . .<br>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      | 8,552. |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)                                                                                                                          |    |        |        |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . . . .                                                                                                                              |    | 2      |        |
| 3 Add lines 1 and 2 . . . . .                                                                                                                                                                                                                     |    | 3      | 8,552. |
| 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      | 8,552. |
| 6 Credits/Payments                                                                                                                                                                                                                                |    |        |        |
| a 2012 estimated tax payments and 2011 overpayment credited to 2012 . . . . .                                                                                                                                                                     | 6a | 7,278. |        |
| 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  | 7,278. |        |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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  | 1,274. |        |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . . .                                                                                                                                            | 10 |        |        |
| 11 Enter the amount of line 10 to be Credited to 2013 estimated tax Refunded                                                                                                                                                                      | 11 |        |        |

**Part VII-A Statements Regarding Activities**

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

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**Part VII-A Statements Regarding Activities (continued)**

|                                              |                                                                                                                                                                                                     |    |     |                          |
|----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|-----|--------------------------|
| 11                                           | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions) . . . . .   | 11 |     | X                        |
| 12                                           | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) . . . . .  | 12 |     | X                        |
| 13                                           | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? . . . . .                                                                       | 13 | X   |                          |
| Website address <input type="checkbox"/> N/A |                                                                                                                                                                                                     |    |     |                          |
| 14                                           | The books are in care of <input type="checkbox"/> ALEXANDER L. ECKMAN Telephone no <input type="checkbox"/> 412-355-8100                                                                            |    |     |                          |
|                                              | Located at <input type="checkbox"/> 1001 LIBERTY AVE, 11TH FLOOR PITTSBURGH, PA ZIP+4 <input type="checkbox"/> 15222                                                                                |    |     |                          |
| 15                                           | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here . . . . .                                                                                       |    |     | <input type="checkbox"/> |
|                                              | 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 | Yes | No                       |
|                                              | See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country <input type="checkbox"/>                                          |    |     | X                        |

**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                                     |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|----------------------------------------|
| <b>1a</b> 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>b</b> If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? . . . . .                                                                                                                                                                                                                                                                           | 1b                           |                                        |
| Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                       |                              |                                        |
| <b>c</b> 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                                      |
| <b>2</b> 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))                                                                                                                                                                                                                                                                                                                            |                              |                                        |
| <b>a</b> 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 <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                              |                                        |
| <b>b</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                           |                                        |
| <b>c</b> If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                 |                              |                                        |
| <b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . .                                                                                                                                                                                                                                                                                                                                                                    | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| <b>b</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                           |                                        |
| <b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .                                                                                                                                                                                                                                                                                                                                                                               | 4a                           | X                                      |
| <b>b</b> Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012? . . . . .                                                                                                                                                                                                                                                              | 4b                           | X                                      |

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**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)****5a** During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?Organizations relying on a current notice regarding disaster assistance check here ☐**5b****c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?☐ Yes ☐ No

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

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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

**6b****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 |
|----------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| ATCH 10              |                                                           | 0                                         | 0                                                                     | 0                                     |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |

**2** Compensation of five highest-paid employees (other than those included on line 1 - see instructions). If none, enter "NONE."

| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---------------------------------------------------------------|-----------------------------------------------------------|------------------|-----------------------------------------------------------------------|---------------------------------------|
| NONE                                                          |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |

Total number of other employees paid over \$50,000 ☐

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

**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

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

## Part IX-A Summary of Direct Charitable Activities

| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. |      | Expenses |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|----------|
| 1                                                                                                                                                                                                                                                      | NONE |          |
| 2                                                                                                                                                                                                                                                      |      |          |
| 3                                                                                                                                                                                                                                                      |      |          |
| 4                                                                                                                                                                                                                                                      |      |          |

**Part IX-B Summary of Program-Related Investments** (see instructions)

| Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 | Amount |
|------------------------------------------------------------------------------------------------------------------|--------|
| <b>1</b> NONE<br>-----<br>-----<br>-----<br>-----                                                                |        |
| <b>2</b> -----<br>-----<br>-----<br>-----                                                                        |        |
| All other program-related investments See instructions                                                           |        |
| <b>3</b> NONE<br>-----<br>-----<br>-----                                                                         |        |
| <b>Total.</b> Add lines 1 through 3 . . . . . ▶                                                                  |        |

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**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

|          |                                                                                                             |           |            |
|----------|-------------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: |           |            |
| <b>a</b> | Average monthly fair market value of securities                                                             | <b>1a</b> | 3,780,642. |
| <b>b</b> | Average of monthly cash balances                                                                            | <b>1b</b> | 166,357.   |
| <b>c</b> | Fair market value of all other assets (see instructions)                                                    | <b>1c</b> | 1,232,712. |
| <b>d</b> | <b>Total</b> (add lines 1a, b, and c)                                                                       | <b>1d</b> | 5,179,711. |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)   | <b>1e</b> |            |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets                                                        | <b>2</b>  |            |
| <b>3</b> | Subtract line 2 from line 1d                                                                                | <b>3</b>  | 5,179,711. |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)  | <b>4</b>  | 77,696.    |
| <b>5</b> | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4 | <b>5</b>  | 5,102,015. |
| <b>6</b> | <b>Minimum investment return.</b> Enter 5% of line 5                                                        | <b>6</b>  | 255,101.   |

**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.)

|           |                                                                                                           |           |          |
|-----------|-----------------------------------------------------------------------------------------------------------|-----------|----------|
| <b>1</b>  | Minimum investment return from Part X, line 6                                                             | <b>1</b>  | 255,101. |
| <b>2a</b> | Tax on investment income for 2012 from Part VI, line 5                                                    | <b>2a</b> | 8,552.   |
| <b>b</b>  | Income tax for 2012. (This does not include the tax from Part VI.)                                        | <b>2b</b> |          |
| <b>c</b>  | Add lines 2a and 2b                                                                                       | <b>2c</b> | 8,552.   |
| <b>3</b>  | Distributable amount before adjustments. Subtract line 2c from line 1                                     | <b>3</b>  | 246,549. |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions                                                 | <b>4</b>  |          |
| <b>5</b>  | Add lines 3 and 4                                                                                         | <b>5</b>  | 246,549. |
| <b>6</b>  | Deduction from distributable amount (see instructions)                                                    | <b>6</b>  |          |
| <b>7</b>  | <b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | <b>7</b>  | 246,549. |

**Part XII Qualifying Distributions** (see instructions)

|          |                                                                                                                                                      |           |            |
|----------|------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:                                                           |           |            |
| <b>a</b> | Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26                                                                        | <b>1a</b> | 1,100,813. |
| <b>b</b> | Program-related investments - total from Part IX-B                                                                                                   | <b>1b</b> |            |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes                                            | <b>2</b>  |            |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the                                                                                  |           |            |
| <b>a</b> | Suitability test (prior IRS approval required)                                                                                                       | <b>3a</b> |            |
| <b>b</b> | Cash distribution test (attach the required schedule)                                                                                                | <b>3b</b> |            |
| <b>4</b> | <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                                    | <b>4</b>  | 1,100,813. |
| <b>5</b> | 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) | <b>5</b>  | 8,552.     |
| <b>6</b> | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4                                                                                | <b>6</b>  | 1,092,261. |

**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)<br>Corpus | (b)<br>Years prior to 2011 | (c)<br>2011 | (d)<br>2012 |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2012 from Part XI, line 7 . . . . .                                                                                                                       |               |                            |             | 246,549.    |
| <b>2</b> Undistributed income, if any, as of the end of 2012                                                                                                                                |               |                            |             |             |
| <b>a</b> Enter amount for 2011 only . . . . .                                                                                                                                               |               |                            |             |             |
| <b>b</b> Total for prior years 20 10 20 09 20 08 . . . . .                                                                                                                                  |               |                            |             |             |
| <b>3</b> Excess distributions carryover, if any, to 2012                                                                                                                                    |               |                            |             |             |
| <b>a</b> From 2007 . . . . . 1,333,043.                                                                                                                                                     |               |                            |             |             |
| <b>b</b> From 2008 . . . . . 917,826.                                                                                                                                                       |               |                            |             |             |
| <b>c</b> From 2009 . . . . . 1,315,743.                                                                                                                                                     |               |                            |             |             |
| <b>d</b> From 2010 . . . . . 901,096.                                                                                                                                                       |               |                            |             |             |
| <b>e</b> From 2011 . . . . . 803,540.                                                                                                                                                       |               |                            |             |             |
| <b>f</b> Total of lines 3a through e . . . . .                                                                                                                                              | 5,271,248.    |                            |             |             |
| <b>4</b> Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 1,100,813.                                                                                                            |               |                            |             |             |
| <b>a</b> Applied to 2011, but not more than line 2a . . . . .                                                                                                                               |               |                            |             |             |
| <b>b</b> Applied to undistributed income of prior years (Election required - see instructions). . . . .                                                                                     |               |                            |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required - see instructions) . . . . .                                                                                            |               |                            |             |             |
| <b>d</b> Applied to 2012 distributable amount . . . . .                                                                                                                                     |               |                            |             | 246,549.    |
| <b>e</b> Remaining amount distributed out of corpus . . . . .                                                                                                                               | 854,264.      |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2012 . . . . .<br>(If an amount appears in column (d), the same amount must be shown in column (a) )                                     |               |                            |             |             |
| <b>6</b> Enter the net total of each column as indicated below:                                                                                                                             |               |                            |             |             |
| <b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5 . . . . .                                                                                                                          | 6,125,512.    |                            |             |             |
| <b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .                                                                                                          |               |                            |             |             |
| <b>c</b> 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 . . . . . |               |                            |             |             |
| <b>d</b> Subtract line 6c from line 6b Taxable amount - see instructions . . . . .                                                                                                          |               |                            |             |             |
| <b>e</b> Undistributed income for 2011. Subtract line 4a from line 2a Taxable amount - see instructions . . . . .                                                                           |               |                            |             |             |
| <b>f</b> Undistributed income for 2012 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013 . . . . .                                                               |               |                            |             |             |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .                                   |               |                            |             |             |
| <b>8</b> Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) . . . . .                                                                              | 1,333,043.    |                            |             |             |
| <b>9</b> Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a . . . . .                                                                                              | 4,792,469.    |                            |             |             |
| <b>10</b> Analysis of line 9.                                                                                                                                                               |               |                            |             |             |
| <b>a</b> Excess from 2008 . . . . . 917,826.                                                                                                                                                |               |                            |             |             |
| <b>b</b> Excess from 2009 . . . . . 1,315,743.                                                                                                                                              |               |                            |             |             |
| <b>c</b> Excess from 2010 . . . . . 901,096.                                                                                                                                                |               |                            |             |             |
| <b>d</b> Excess from 2011 . . . . . 803,540.                                                                                                                                                |               |                            |             |             |
| <b>e</b> Excess from 2012 . . . . . 854,264.                                                                                                                                                |               |                            |             |             |

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

NOT APPLICABLE

**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 . . . . .

| Tax year                                                                                                                                                    | Prior 3 years |          |          |  | (e) Total |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------|----------|--|-----------|
| (a) 2012                                                                                                                                                    | (b) 2011      | (c) 2010 | (d) 2009 |  |           |
|                                                                                                                                                             |               |          |          |  |           |
| <b>b</b> 85% of line 2a . . . . .                                                                                                                           |               |          |          |  |           |
| <b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .                                                                      |               |          |          |  |           |
| <b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .                                                    |               |          |          |  |           |
| <b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .                            |               |          |          |  |           |
| <b>3</b> Complete 3a, b, or c for the alternative test relied upon . . . . .                                                                                |               |          |          |  |           |
| <b>a</b> "Assets" alternative test - enter . . . . .                                                                                                        |               |          |          |  |           |
| (1) Value of all assets . . . . .                                                                                                                           |               |          |          |  |           |
| (2) Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .                                                                                     |               |          |          |  |           |
| <b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . . . .                       |               |          |          |  |           |
| <b>c</b> "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).)

ROBERT P. BOZZONE

**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:

N/A

**c** Any submission deadlines.

N/A

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

N/A

**Part XV Supplementary Information (continued)****3 Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient<br>Name and address (home or business)       | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution | Amount     |
|--------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------|------------|
| <b>a Paid during the year</b><br>SEE ATTACHED SCHEDULE |                                                                                                                    |                                      | GENERAL FUND                        | 1,100,813. |
| <b>Total</b> .....                                     |                                                                                                                    |                                      | ▶ <b>3a</b>                         | 1,100,813. |
| <b>b Approved for future payment</b>                   |                                                                                                                    |                                      |                                     |            |
| <b>Total</b> .....                                     |                                                                                                                    |                                      | ▶ <b>3b</b>                         |            |

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**Part XVI-A      Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated

| Enter gross amounts unless otherwise indicated |                                                          | Unrelated business income |               | Excluded by section 512, 513, or 514 |               | (e)<br>Related or exempt<br>function income<br>(See instructions ) |
|------------------------------------------------|----------------------------------------------------------|---------------------------|---------------|--------------------------------------|---------------|--------------------------------------------------------------------|
|                                                |                                                          | (a)<br>Business code      | (b)<br>Amount | (c)<br>Exclusion code                | (d)<br>Amount |                                                                    |
| <b>1</b>                                       | Program service revenue                                  |                           |               |                                      |               |                                                                    |
| a                                              | _____                                                    |                           |               |                                      |               |                                                                    |
| b                                              | _____                                                    |                           |               |                                      |               |                                                                    |
| c                                              | _____                                                    |                           |               |                                      |               |                                                                    |
| d                                              | _____                                                    |                           |               |                                      |               |                                                                    |
| e                                              | _____                                                    |                           |               |                                      |               |                                                                    |
| f                                              | _____                                                    |                           |               |                                      |               |                                                                    |
| g                                              | Fees and contracts from government agencies              |                           |               |                                      |               |                                                                    |
| <b>2</b>                                       | Membership dues and assessments . . . . .                |                           |               |                                      |               |                                                                    |
| <b>3</b>                                       | Interest on savings and temporary cash investments       |                           |               | 14                                   | 2,000.        |                                                                    |
| <b>4</b>                                       | Dividends and interest from securities . . . . .         |                           |               | 14                                   | 94,729.       |                                                                    |
| <b>5</b>                                       | Net rental income or (loss) from real estate:            |                           |               |                                      |               |                                                                    |
| a                                              | Debt-financed property . . . . .                         |                           |               |                                      |               |                                                                    |
| b                                              | Not debt-financed property . . . . .                     |                           |               |                                      |               |                                                                    |
| <b>6</b>                                       | Net rental income or (loss) from personal property .     |                           |               |                                      |               |                                                                    |
| <b>7</b>                                       | Other investment income . . . . .                        |                           |               | 41                                   | -2,211.       |                                                                    |
| <b>8</b>                                       | Gain or (loss) from sales of assets other than inventory |                           |               | 18                                   | 794,907.      |                                                                    |
| <b>9</b>                                       | Net income or (loss) from special events . . . . .       |                           |               |                                      |               |                                                                    |
| <b>10</b>                                      | Gross profit or (loss) from sales of inventory . . .     |                           |               |                                      |               |                                                                    |
| <b>11</b>                                      | Other revenue a _____                                    |                           |               |                                      |               |                                                                    |
| b                                              | _____                                                    |                           |               |                                      |               |                                                                    |
| c                                              | _____                                                    |                           |               |                                      |               |                                                                    |
| d                                              | _____                                                    |                           |               |                                      |               |                                                                    |
| e                                              | _____                                                    |                           |               |                                      |               |                                                                    |
| <b>12</b>                                      | Subtotal Add columns (b), (d), and (e) . . . . .         |                           |               |                                      | 889,425.      |                                                                    |
| <b>13</b>                                      | Total. Add line 12, columns (b), (d), and (e) . . . . .  |                           |               |                                      |               | 889,425.                                                           |

(See worksheet in line 13 instructions to verify calculations )

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

[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 |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|-----|----|
| <b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of:                                                                                                                                                                                                                                                                                                          |  |     |    |
| (1) Cash                                                                                                                                                                                                                                                                                                                                                                                             |  |     | X  |
| (2) Other assets                                                                                                                                                                                                                                                                                                                                                                                     |  |     | X  |
| <b>b</b> Other transactions:                                                                                                                                                                                                                                                                                                                                                                         |  |     |    |
| (1) Sales of assets to a noncharitable exempt organization                                                                                                                                                                                                                                                                                                                                           |  |     | X  |
| (2) Purchases of assets from a noncharitable exempt organization                                                                                                                                                                                                                                                                                                                                     |  |     | X  |
| (3) Rental of facilities, equipment, or other assets                                                                                                                                                                                                                                                                                                                                                 |  |     | X  |
| (4) Reimbursement arrangements                                                                                                                                                                                                                                                                                                                                                                       |  |     | X  |
| (5) Loans or loan guarantees                                                                                                                                                                                                                                                                                                                                                                         |  |     | X  |
| (6) Performance of services or membership or fundraising solicitations                                                                                                                                                                                                                                                                                                                               |  |     | X  |
| <b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees                                                                                                                                                                                                                                                                                                            |  |     | X  |
| <b>d</b> 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 |  |     |    |

PAGE 15

• If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

• If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

|                                                                                            |                                                                                         |                                         |
|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|-----------------------------------------|
| <b>Type or print</b><br><br>File by the due date for filing your return. See instructions. | Enter filer's identifying number, see instructions                                      |                                         |
|                                                                                            | Name of exempt organization or other filer, see instructions                            | Employer identification number (EIN) or |
|                                                                                            | BOZZONE FAMILY FOUNDATION                                                               | 25-6277066                              |
|                                                                                            | Number, street, and room or suite no. If a P O box, see instructions                    | Social security number (SSN)            |
|                                                                                            | C/O ECKMAN & DANOVIKZ LLC                                                               |                                         |
|                                                                                            | City, town or post office, state, and ZIP code. For a foreign address, see instructions |                                         |
|                                                                                            | PITTSBURGH, PA 15222                                                                    |                                         |

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-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          |

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

• The books are in the care of ☒ ALEXANDER L. ECKMAN

Telephone No ☒ 412 355-8100

FAX No. ☒ 412 355-8106

• 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

4 I request an additional 3-month extension of time until 11/15, 2013 .

5 For calendar year 2012, or other tax year beginning . . . . ., 20 . . . . ., and ending . . . . ., 20 . . . . .

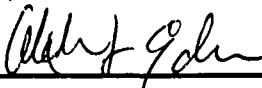
6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return  
☐ Change in accounting period

7 State in detail why you need the extension THE FOUNDATION HAS INVESTMENTS IN PARTNERSHIPS THAT WILL PROVIDE FORMS K-1 AFTER THE FIRST EXTENDED DUE DATE OF AUGUST 15, 2013.

|                                                                                                                                                                                                                                            |              |   |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|---|
| <b>8a</b> 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.                                                                                 | <b>8a</b> \$ | 0 |
| <b>b</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 and any amount paid previously with Form 8868. | <b>8b</b> \$ | 0 |
| <b>c Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.                                                           | <b>8c</b> \$ | 0 |

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature 

Title ☒ ATTORNEY

Date ☒ 05/07/2013

Form 8868 (Rev 1-2013)

**FORM 990-PF - PART IV**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

| Kind of Property                             |                                       | Description                                                                                                     |                          |                                |                                    | P<br>or<br>D | Date<br>acquired      | Date sold  |
|----------------------------------------------|---------------------------------------|-----------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------------|------------------------------------|--------------|-----------------------|------------|
| Gross sale<br>price less<br>expenses of sale | Depreciation<br>allowed/<br>allowable | Cost or<br>other<br>basis                                                                                       | FMV<br>as of<br>12/31/69 | Adj basis<br>as of<br>12/31/69 | Excess of<br>FMV over<br>adj basis |              | Gain<br>or<br>(loss)  |            |
|                                              |                                       | TOTAL LONG-TERM COMMON TRUST FUND AND<br>PARTNERSHIP, S CORPORATION, AND OTHER<br>ESTATES OR TRUST GAIN OR LOSS |                          |                                |                                    |              | 35,737.               |            |
| 1,916,957.                                   |                                       | HAWTHORNE- SEE ATTACHED<br>1,162,731.                                                                           |                          |                                |                                    |              | VAR<br>754,226.       | VAR        |
| 62,036.                                      |                                       | 4735.5966 HC CAPITAL<br>60,710.                                                                                 |                          |                                |                                    |              | 02/14/2002<br>1,326.  | 11/01/2012 |
|                                              |                                       | 4735.5966 HC CAPITAL- WASH SALES<br>1,326.                                                                      |                          |                                |                                    |              | 02/14/2002<br>-1,326. | 11/01/2012 |
| TOTAL GAIN (LOSS) .....                      |                                       |                                                                                                                 |                          |                                |                                    |              | <u>789,963.</u>       |            |

ATTACHMENT 1FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

| <u>DESCRIPTION</u>                       | <u>REVENUE<br/>AND<br/>EXPENSES<br/>PER BOOKS</u> | <u>NET<br/>INVESTMENT<br/>INCOME</u> |
|------------------------------------------|---------------------------------------------------|--------------------------------------|
| HIRTLE CALLAGHAN PRIVATE EQ FUND III, LP | 388.                                              | 388.                                 |
| HIRTLE CALLAGHAN PRIVATE EQ FUND IV, LP  | 1,612.                                            | 1,612.                               |
| TOTAL                                    | <u>2,000.</u>                                     | <u>2,000.</u>                        |

ATTACHMENT 2FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

| <u>DESCRIPTION</u>                       | <u>REVENUE<br/>AND<br/>EXPENSES<br/>PER BOOKS</u> | <u>NET<br/>INVESTMENT<br/>INCOME</u> |
|------------------------------------------|---------------------------------------------------|--------------------------------------|
| PNC BANK, N.A. ACT                       | 90,639.                                           | 90,639.                              |
| HIRTLE CALLAGHAN PRIVATE EQ FUND III, LP | 261.                                              | 261.                                 |
| HIRTLE CALLAGHAN PRIVATE EQ FUND IV, LP  | 3,829.                                            | 3,829.                               |
| TOTAL                                    | <u>94,729.</u>                                    | <u>94,729.</u>                       |

ATTACHMENT 3

FORM 990PF, PART I - OTHER INCOME

| DESCRIPTION                              | REVENUE<br>AND<br>EXPENSES<br>PER BOOKS | NET<br>INVESTMENT<br>INCOME |
|------------------------------------------|-----------------------------------------|-----------------------------|
| HIRTLE CALLAGHAN PRIVATE EQ FUND III, LP | -2,056.                                 | -2,056.                     |
| HIRTLE CALLAGHAN PRIVATE EQ FUND IV, LP  | -251.                                   | -251.                       |
| HIRTLE CALLAGHAN OFFSHORE FUND V         | 96.                                     | 96.                         |
| TOTALS                                   | -2,211.                                 | -2,211.                     |

ATTACHMENT 4

FORM 990PF, PART I - ACCOUNTING FEES

| <u>DESCRIPTION</u> | <u>REVENUE<br/>AND<br/>EXPENSES<br/>PER BOOKS</u> | <u>NET<br/>INVESTMENT<br/>INCOME</u> | <u>ADJUSTED<br/>NET<br/>INCOME</u> | <u>CHARITABLE<br/>PURPOSES</u> |
|--------------------|---------------------------------------------------|--------------------------------------|------------------------------------|--------------------------------|
| ACCOUNTING FEES    | 3,850.                                            |                                      |                                    |                                |
| TOTALS             | <u>3,850.</u>                                     |                                      |                                    |                                |

ATTACHMENT 5FORM 990PF, PART I - INTEREST EXPENSE

| <u>DESCRIPTION</u>             | <u>REVENUE<br/>AND<br/>EXPENSES<br/>PER BOOKS</u> | <u>NET<br/>INVESTMENT<br/>INCOME</u> |
|--------------------------------|---------------------------------------------------|--------------------------------------|
| HC PRIVATE EQUITY FUND III, LP | 14.                                               | 14.                                  |
| INTEREST EXPENSE               | 9.                                                | 9.                                   |
| TOTALS                         | <u>23.</u>                                        | <u>23.</u>                           |

ATTACHMENT 6FORM 990PF, PART I - TAXES

| <u>DESCRIPTION</u>             | <u>REVENUE<br/>AND<br/>EXPENSES<br/>PER BOOKS</u> | <u>NET<br/>INVESTMENT<br/>INCOME</u> |
|--------------------------------|---------------------------------------------------|--------------------------------------|
| FOREIGN TAXES-HC PR EQ III, LP | 291.                                              | 291.                                 |
| FOREIGN TAXES- HAWTHORN (PNC)  | 5,174.                                            | 5,174.                               |
| EXCISE TAX                     | 206.                                              |                                      |
| TOTALS                         | <u>5,671.</u>                                     | <u>5,465.</u>                        |

ATTACHMENT 7FORM 990PF, PART I - OTHER EXPENSES

| DESCRIPTION                   | REVENUE<br>AND<br>EXPENSES<br>PER BOOKS | NET<br>INVESTMENT<br>INCOME |
|-------------------------------|-----------------------------------------|-----------------------------|
| PROF FEES - HIRTLE CALLAGHAN  | 13,731.                                 | 13,731.                     |
| PROF FEES - HAWTHORNE         | 5,781.                                  | 5,781.                      |
| OTHER FEES - HC PR EQ III, LP | 2,036.                                  | 2,036.                      |
| OTHER FEES - HC PR EQ IV, LP  | 2,275.                                  | 2,275.                      |
| TOTALS                        | <u>23,823.</u>                          | <u>23,823.</u>              |

ATTACHMENT 8FORM 990PF, PART II - CORPORATE STOCK

| <u>DESCRIPTION</u>      | <u>ENDING<br/>BOOK VALUE</u> | <u>ENDING<br/>FMV</u> |
|-------------------------|------------------------------|-----------------------|
| MUTUAL FUND INVESTMENTS | 2,695,897.                   | 3,531,811.            |
| PARTNERSHIP INVESTMENTS | 1,104,924.                   | 1,280,283.            |
| TOTALS                  | <u>3,800,821.</u>            | <u>4,812,094.</u>     |

ATTACHMENT 9FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

| <u>DESCRIPTION</u>                       | <u>AMOUNT</u>   |
|------------------------------------------|-----------------|
| INVESTMENT BASIS ADJUSTMENTS - HC V LP   | 1,439.          |
| INVESTMENT BASIS ADJUSTMENTS - HC VI LP  | 20,930.         |
| INVESTMENT BASIS ADJUSTMENTS - HC III LP | 2,950.          |
| INVESTMENT BASIS ADJUSTMENTS - HC IV LP  | 1,284.          |
| BOOK VS TAX GAINS                        | 585,903.        |
| TOTAL                                    | <u>612,506.</u> |

BOZZONE FAMILY FOUNDATION

25-6277066

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 10

TITLE AND AVERAGE HOURS PER  
WEEK DEVOTED TO POSITION

NAME AND ADDRESS

ROBERT P. BOZZONE  
1001 LIBERTY AVE 11TH FLOOR  
PITTSBURGH, PA 15222

TRUSTEE

0

0

0

GRAND TOTALS

**SCHEDULE D**  
**(Form 1041)**

Department of the Treasury  
Internal Revenue Service

**Capital Gains and Losses**

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

OMB No 1545-0092

**2012**

Name of estate or trust

BOZZONE FAMILY FOUNDATION

Employer identification number

25-6277066

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

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

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

|                                                                                                                                            |           |        |
|--------------------------------------------------------------------------------------------------------------------------------------------|-----------|--------|
| <b>b</b> Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b                                                           | <b>1b</b> | 4,944. |
| <b>2</b> Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824                                                           | <b>2</b>  |        |
| <b>3</b> Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts                                      | <b>3</b>  |        |
| <b>4</b> Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2011 Capital Loss Carryover Worksheet             | <b>4</b>  | ( )    |
| <b>5</b> <b>Net short-term gain or (loss).</b> Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back | <b>5</b>  | 4,944. |

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

| (a) Description of property<br>(Example 100 shares 7% preferred of "Z" Co.) | (b) Date acquired<br>(mo., day, yr.) | (c) Date sold<br>(mo., day, yr.) | (d) Sales price | (e) Cost or other basis<br>(see instructions) | (f) Gain or (loss) for<br>the entire year<br>Subtract (e) from (d) |
|-----------------------------------------------------------------------------|--------------------------------------|----------------------------------|-----------------|-----------------------------------------------|--------------------------------------------------------------------|
| <b>6a</b>                                                                   |                                      |                                  |                 |                                               |                                                                    |
|                                                                             |                                      |                                  |                 |                                               |                                                                    |
|                                                                             |                                      |                                  |                 |                                               |                                                                    |
|                                                                             |                                      |                                  |                 |                                               |                                                                    |
|                                                                             |                                      |                                  |                 |                                               |                                                                    |
|                                                                             |                                      |                                  |                 |                                               |                                                                    |

|                                                                                                                                              |           |          |
|----------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------|
| <b>b</b> Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b                                                              | <b>6b</b> | 754,226. |
| <b>7</b> Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824                                                        | <b>7</b>  |          |
| <b>8</b> Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts                                         | <b>8</b>  | 35,737.  |
| <b>9</b> Capital gain distributions                                                                                                          | <b>9</b>  |          |
| <b>10</b> Gain from Form 4797, Part I                                                                                                        | <b>10</b> |          |
| <b>11</b> Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2011 Capital Loss Carryover Worksheet              | <b>11</b> | ( )      |
| <b>12</b> <b>Net long-term gain or (loss).</b> Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back | <b>12</b> | 789,963. |

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

Schedule D (Form 1041) 2012

| <b>Part III Summary of Parts I and II</b>                         |                                                                       | (1) Beneficiaries' (see instr.) | (2) Estate's or trust's | (3) Total |
|-------------------------------------------------------------------|-----------------------------------------------------------------------|---------------------------------|-------------------------|-----------|
| <b>Caution: Read the instructions before completing this part</b> |                                                                       |                                 |                         |           |
| <b>13</b>                                                         | <b>Net short-term gain or (loss)</b> . . . . .                        | <b>13</b>                       |                         | 4,944.    |
| <b>14</b>                                                         | <b>Net long-term gain or (loss):</b>                                  |                                 |                         |           |
| a                                                                 | Total for year . . . . .                                              | <b>14a</b>                      |                         | 789,963.  |
| b                                                                 | Unrecaptured section 1250 gain (see line 18 of the wrkst.) . . . . .  | <b>14b</b>                      |                         |           |
| c                                                                 | 28% rate gain . . . . .                                               | <b>14c</b>                      |                         |           |
| <b>15</b>                                                         | <b>Total net gain or (loss).</b> Combine lines 13 and 14a . . . . . ▶ | <b>15</b>                       |                         | 794,907.  |

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

| <b>Part IV Capital Loss Limitation</b> |                                                                                                                                                                                       |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>16</b>                              | Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the <b>smaller</b> of<br>a The loss on line 15, column (3) or b \$3,000 . . . . . |
| <b>16</b>                              | ( )                                                                                                                                                                                   |

**Note:** If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

| <b>Part V Tax Computation Using Maximum Capital Gains Rates</b>                                                                                                                                                                                                                                                                                                         |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| <b>Form 1041 filers.</b> Complete this part <b>only</b> if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.                                                                                                                       |  |
| <b>Caution:</b> Skip this part and complete the <b>Schedule D Tax Worksheet</b> in the instructions if:<br>• Either line 14b, col (2) or line 14c, col (2) is more than zero, or<br>• Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.                                                                                                            |  |
| <b>Form 990-T trusts.</b> Complete this part <b>only</b> if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the <b>Schedule D Tax Worksheet</b> in the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero. |  |

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

Schedule D (Form 1041) 2012

Department of the Treasury  
Internal Revenue Service

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

OMB No 1545-0092

2012

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

Name of estate or trust

BOZZONE FAMILY FOUNDATION

Employer identification number

25-6277066

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

|                                                                                                    |        |
|----------------------------------------------------------------------------------------------------|--------|
| <b>1b Total.</b> Combine the amounts in column (f) Enter here and on Schedule D, line 1b . . . . . | 4,944. |
|----------------------------------------------------------------------------------------------------|--------|

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

**Schedule D-1 (Form 1041) 2012**

**JSA**

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PAGE 33

Employer identification number

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

**6b Total.** Combine the amounts in column (f). Enter here and on Schedule D, line 6b . . . . . 754,226.

Schedule D-1 (Form 1041) 2012

## Schedule D Detail of Long-term Capital Gains and Losses

| Description                           | Date<br>Acquired | Date<br>Sold | Gross Sales<br>Price | Cost or Other<br>Basis | Long-term<br>Gain/Loss |
|---------------------------------------|------------------|--------------|----------------------|------------------------|------------------------|
| 15% RATE CAPITAL GAINS (LOSSES)       |                  |              |                      |                        |                        |
| 1. AOL TIME WARNER INC                | 01/01/2001       | 04/10/2012   | 30.76                | NONE                   | 30.76                  |
| 3943.218 HC CAPITAL TRUST THE         |                  |              |                      |                        |                        |
| VALUE EQUITY PORTFOLIO                | 02/14/2002       | 05/02/2012   | 50,000.00            | 51,656.16              | -1,656.16              |
| 2162.63 HC CAPITAL TRUST THE          |                  |              |                      |                        |                        |
| VALUE EQUITY PORTFOLIO                | 02/14/2002       | 06/01/2012   | 25,000.00            | 28,330.45              | -3,330.45              |
| 4205.214 HC CAPITAL TRUST THE         |                  |              |                      |                        |                        |
| VALUE EQUITY PORTFOLIO                | 02/14/2002       | 06/07/2012   | 50,000.00            | 55,088.30              | -5,088.30              |
| 2367.798 HC CAPITAL TRUST THE         |                  |              |                      |                        |                        |
| VALUE EQUITY PORTFOLIO                | 02/14/2002       | 08/21/2012   | 30,000.00            | 31,018.15              | -1,018.15              |
| 334.6064 HC CAPITAL TRUST THE         | 02/14/2002       | 11/01/2012   | 4,289.65             | 4,383.34               | -93.69                 |
| 2104.321 HC CAPITAL TRUST THE         |                  |              |                      |                        |                        |
| SMALL CAP EQUITY PORTFOLIO            | 01/24/2002       | 08/21/2012   | 29,397.36            | 25,567.50              | 3,829.86               |
| 689.713 HC CAPITAL TRUST THE          |                  |              |                      |                        |                        |
| SMALL CAP EQUITY PORTFOLIO            | 01/24/2002       | 11/01/2012   | 9,787.02             | 8,380.01               | 1,407.01               |
| 9248.02 HC CAPITAL TRUST THE          |                  |              |                      |                        |                        |
| INTERNATIONAL EQUITY                  | 02/14/2002       | 05/02/2012   | 95,994.45            | 78,515.69              | 17,478.76              |
| 11633.021 HC CAPITAL TRUST THE        | 02/14/2002       | 08/21/2012   | 119,820.11           | 98,764.35              | 21,055.76              |
| 15551.367 HC CAPITAL TRUST THE        | 02/14/2002       | 11/01/2012   | 165,000.00           | 132,031.10             | 32,968.90              |
| 2906.967 HC CAPITAL TRUST THE         | 02/14/2002       | 05/02/2012   | 45,116.13            | 30,842.92              | 14,273.21              |
| 5304.102 HC CAPITAL TRUST THE         | 02/14/2002       | 06/01/2012   | 75,000.00            | 56,276.53              | 18,723.47              |
| 3434.066 HC CAPITAL TRUST THE         | 02/14/2002       | 06/07/2012   | 50,000.00            | 36,435.44              | 13,564.56              |
| 803.709 HC CAPITAL TRUST THE          | 02/14/2002       | 08/21/2012   | 12,353.01            | 8,476.17               | 3,876.84               |
| 9945.101 HC CAPITAL TRUST THE         | 03/10/2005       | 11/01/2012   | 122,751.81           | 83,503.01              | 39,248.80              |
| 1. OM GROUP INC                       | 01/01/2001       | 03/13/2012   | 19.53                | NONE                   | 19.53                  |
| 860.357 SSGA EMERGING MARKETS         |                  |              |                      |                        |                        |
| FUND CL S FND 1510                    | 01/14/2009       | 11/01/2012   | 16,837.18            | 12,052.66              | 4,784.52               |
| 2700. TELEDYNE TECHNOLOGIES INC       | 09/29/2009       | 11/30/2012   | 171,018.66           | 69,174.69              | 101,843.97             |
| 12174. TELEDYNE TECHNOLOGIES INC      | 01/21/2010       | 11/30/2012   | 766,214.38           | 323,106.69             | 443,107.69             |
| 443. TELEDYNE TECHNOLOGIES INC        | 07/02/2001       | 12/03/2012   | 27,776.05            | 8,593.41               | 19,182.64              |
| 800. TELEDYNE TECHNOLOGIES INC        | 01/02/2001       | 12/03/2012   | 50,550.86            | 20,534.57              | 30,016.29              |
| TOTAL 15% RATE CAPITAL GAINS (LOSSES) |                  |              | 1916957.00           | 1162731.00             | 754,226.00             |
| Totals                                |                  |              | 1916957.00           | 1162731.00             | 754,226.00             |

JSA  
2F0970 1 000

## LILLY FOUNDATION

JSA  
2F0971 1 000

**Bozzone Family Foundation Contributions**  
**1st Quarter 1/1/12 through 3/31/12**

| <u>DATE</u> | <u>INSTITUTION</u>                                                                                                                     | <u>AMOUNT</u> |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------|---------------|
| 1/30/2012   | <b>St. Thomas More Parish School</b><br>Attn: Mrs. Sheila A. Riley, Principal<br>134 Fort Couch Road<br>Pittsburgh, PA 15241<br>(Mike) | \$1,000.00    |
| 2/7/2012    | <b>Communities In Schools</b><br>Attn: Nicole Molinaro Karaczun<br>494 Pittsburgh Street<br>Springdale PA 15144                        | \$1,000.00    |
| 2/8/2012    | <b>Penn State</b><br>New Kensington<br>Attn: Donna M. Speer<br>3550 Seventh Street Road<br>New Kensington PA 15068-1798                | \$5,500.00    |
| 2/9/2012    | <b>CASA of Westmoreland Inc</b><br>c/o Mary Ann Petrillo, Esq.<br>412 Main St<br>Irwin PA 15642<br>(Mike)                              | \$500.00      |
| 2/9/2012    | <b>McIntyre Elementary PTSO</b><br>Attn: Cindy McCarthy<br>200 McIntyre Rd<br>Pittsburgh PA 15237<br>(Mike)                            | \$1,000.00    |
| 2/15/2012   | <b>Greater Pittsburgh Community Food Bank</b><br>Attn: D. Jermaine Husser<br>1 North Linden Street<br>Duquesne PA 15110                | \$5,000.00    |
| 2/15/2012   | <b>Pittsburgh CLO</b><br>Attn: Wynnee Fedele<br>719 Liberty Ave.<br>Pittsburgh, PA 15222                                               | \$2,000.00    |

**Bozzone Family Foundation Contributions**  
**1st Quarter 1/1/12 through 3/31/12**

| <u>DATE</u>  | <u>INSTITUTION</u>                                                                                          | <u>AMOUNT</u>      |
|--------------|-------------------------------------------------------------------------------------------------------------|--------------------|
| 2/15/2012    | <b>Lower Burrell Meals on Wheels</b><br>1009 Puckety Church Road<br>Lower Burrell, PA 15068                 | \$4,000.00         |
| 2/23/2012    | <b>Family Hospice and Palliative Care</b><br>Development Office<br>50 Moffett Street<br>Pittsburgh PA 15243 | \$1,000.00         |
| 3/5/2012     | <b>St Margaret Mary Church</b><br>Attn: Rev James T Gaston<br>3055 Leechburg Rd<br>Lower Burrell, PA 15068  | \$15,000.00        |
| 3/13/2012    | <b>WQED - TV</b><br>Attn: Deborah L Acklin<br>4802 Fifth Avenue<br>Pittsburgh PA 15213                      | 6,563.00           |
| <b>TOTAL</b> |                                                                                                             | <b>\$42,563.00</b> |

**Bozzone Family Foundation Contributions  
2nd Quarter 4/1/12 through 6/30/12**

| DATE     | INSTITUTION                                                                                                                                                                             | AMOUNT      |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 4/5/2012 | Erin Engel, Development Officer<br><b>Senator John Heinz History Center</b><br>1212 Smallman Street<br>Pittsburgh PA 15222                                                              | \$5,000.00  |
| 4/5/2012 | <b>Blairsville Volunteer Fire Deapartment</b><br>51 West Campbell Street<br>Blairsville PA 15717                                                                                        | \$1,000.00  |
| 5/1/2012 | <b>Carnegie Mellon University</b><br>Attn: Sharon King<br>6 PPG Place 14 <sup>th</sup> Floor<br>Pittsburgh PA 15222-5409                                                                | \$20,000.00 |
| 5/1/2012 | <b>Verland</b><br>Attn: Frank Wakely<br>212 Iris Road<br>Sewickley PA 15143                                                                                                             | \$2,000.00  |
| 5/1/2012 | <b>Habitat for Humanity Greater Pittsburgh</b><br>c/o Maggie I. Withrow, Executive Director<br>212 Yost Boulevard Suite A<br>Braddock Hills Shopping Center<br>Pittsburgh PA 15221-4818 | \$20,000.00 |
| 5/7/2012 | <b>The Pittsburgh Cultural Trust</b><br>Attn: J. Kevin McMahon<br>803 Liberty Avenue<br>Pittsburgh PA 15222-3703                                                                        | \$15,000.00 |
| 5/9/2012 | <b>Valley Points YMCA</b><br>Attn: Kevin S Bode<br>800 Constitution Blvd.<br>New Kensington, PA 15068                                                                                   | \$10,000.00 |

**Bozzone Family Foundation Contributions  
2nd Quarter 4/1/12 through 6/30/12**

|           |                                                                                                                                                                                           |             |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 5/24/2012 | <b>Pittsburgh Leadership Foundation</b><br>100 Ross Street<br>Pittsburgh, PA 15219<br>(Mark)                                                                                              | \$3,000.00  |
| 5/24/2012 | <b>Pittsburgh Habitat for Humanity</b><br>c/o Maggie I. Withrow, Executive Director<br>212 Yost Boulevard Suite A<br>Braddock Hills Shopping Center<br>Pittsburgh PA 15221-4818<br>(Mark) | \$15,000 00 |
| 5/24/2012 | <b>Catholic Charities</b><br>212 Ninth Street 6 <sup>th</sup> Floor<br>Pittsburgh, PA 15222<br>(Mark)                                                                                     | \$6,000.00  |
| 5/24/2012 | Mr. Rick Munroe<br>Vice President for Development<br><b>Shady Side Academy</b><br>423 Fox Chapel Road<br>Pittsburgh, PA 15238<br>(Mark)                                                   | \$5,000.00  |
| 5/24/2012 | <b>Crohn's and Colitis Foundation</b><br>300 Penn Center Blvd. Suite 401<br>Pittsburgh, PA 15235<br>(Mark)                                                                                | \$1,000.00  |
| 5/24/2012 | <b>The Neighborhood Academy</b><br>709 N. Aiken Ave<br>Pittsburgh, PA 15224<br>(Mark)                                                                                                     | \$1,000.00  |
| 5/24/2012 | <b>Greater Pittsburgh Community Food Bank</b><br>1 North Linden Street<br>Duquesne, PA 15110<br>(Mark)                                                                                    | \$6,000.00  |
| 5/24/2012 | <b>Carnegie Museums of Natural History</b><br>4400 Forbes Avenue<br>Pittsburgh PA 15213<br>(Mark)                                                                                         | \$20,000.00 |

**Bozzone Family Foundation Contributions  
2nd Quarter 4/1/12 through 6/30/12**

|           |                                                                                                                                      |              |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------|--------------|
| 5/24/2012 | <b>Valley Points YMCA</b><br>800 Constitution Blvd.<br>New Kensington, PA 15068<br>(Mark)                                            | \$1,000.00   |
| 5/24/2012 | <b>St. Mary's of the Assumption</b><br>2510 Middle Road<br>Glenshaw, PA 15116<br>(Mark)                                              | \$5,000.00   |
| 5/24/2012 | <b>Animal Rescue League of Western PA</b><br>Attn: Donations Department<br>6620 Hamilton Avenue<br>Pittsburgh PA 15206<br>(Mark)     | \$2,000.00   |
| 5/24/2012 | <b>St. Paul's Seminary</b><br>Attn: Father Meile<br>2900 Noblestown Road<br>Pittsburgh PA 15205<br>(Mark)                            | \$10,000.00  |
| 6/1/2012  | <b>United Way of Allegheny County</b><br>P O Box 640716<br>Pittsburgh PA 15264-0716                                                  | \$100,000.00 |
| 6/6/2012  | <b>Sisters of Charity of Seton Hill</b><br>Office of Institutional Advancement<br>144 DePaul Center Road<br>Greensburg PA 15601-1253 | \$1,000.00   |
| 6/14/2012 | <b>VNA Family Services</b><br>154 Hindman Road<br>Butler, PA 16001-2479                                                              | \$2,000.00   |
| 6/14/2012 | <b>Family Resources</b><br>Attn: Walter Smith<br>141 S. Highland Ave., Ste 201<br>Pittsburgh, PA 15206                               | \$2,000.00   |

**Bozzone Family Foundation Contributions  
2nd Quarter 4/1/12 through 6/30/12**

|           |                                                                                                                                                                                                       |             |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 6/14/2012 | <b>Make-A-Wish Foundation of<br/>Greater Pennsylvania &amp;<br/>Southern W Virginia</b><br>Attn: Judith Stone<br>The Gulf Tower<br>707 Grant St Gulf Tower 37 <sup>th</sup> Fl<br>Pittsburgh PA 15219 | \$7,800.00  |
| 6/15/2012 | <b>St Joseph's High School</b><br>Attn: Beverly Kaniecki<br>800 Montana Ave<br>Natrona Heights PA 15065                                                                                               | \$35,000.00 |
| 6/15/2012 | <b>Rensselaer Polytechnic Institute</b><br>Attn: Ian Farrell<br>110 8 <sup>th</sup> Street<br>Troy NY 12180-3590                                                                                      | \$20,000.00 |
| 6/19/2012 | <b>Carnegie Museums of Pittsburgh</b><br>Attn: Dolly Ellenberg<br>Vice President for Development<br>4400 Forbes Avenue<br>Pittsburgh PA 15213                                                         | \$27,500.00 |
| 6/25/2012 | <b>Lower Burrell Volunteer Fire CO #3</b><br>P O Box 2156<br>Lower Burrell PA 15068                                                                                                                   | \$500.00    |
| 6/25/2012 | <b>Freeport International Baseball Invitational</b><br>Attn: Jim Swartz Jr.<br>107 Second Street<br>Freeport PA 16229                                                                                 | \$1,000.00  |
| 6/25/2012 | <b>Valley Points Family YMCA</b><br>800 Constitution Blvd.<br>New Kensington, PA 15068<br>(Mike)                                                                                                      | \$3,000.00  |
| 6/25/2012 | <b>Township of Indiana</b><br>Attn: Jeffrey S Curti<br>3710 Saxonburg Blvd<br>Pittsburgh PA 15238<br>(Mike)                                                                                           | \$4,000.00  |

|              |                     |
|--------------|---------------------|
| <b>TOTAL</b> | <b>\$351,800.00</b> |
|--------------|---------------------|

**Bozzone Family Foundation Contributions  
3rd Quarter 7/1/12 through 9/30/12**

| DATE      | INSTITUTION                                                                                                        | AMOUNT       |
|-----------|--------------------------------------------------------------------------------------------------------------------|--------------|
| 7/18/2012 | <b>Rensselaer Newman Foundation</b><br>Student Union Room 3514<br>110 8 <sup>th</sup> Street<br>Troy NY 12180-3590 | \$1,000.00   |
| 7/18/2012 | <b>Little Sisters of the Poor</b><br>Attn: Richard B. Fisher<br>1028 Benton Avenue<br>Pittsburgh PA 15212          | \$2,000.00   |
| 8/10/2012 | <b>Pittsburgh Foundation</b><br>C/O Nancy Moulton Charitable Trust<br>5 PPG Place Suite 250<br>Pittsburgh PA 15222 | \$1,000.00   |
| 8/10/2012 | <b>Library Society</b><br>880 Barnes Street<br>New Kensington, PA 15222                                            | \$1,000.00   |
| 8/13/2012 | <b>Deer Valley Conservancy</b><br>Deer Valley YMCA Camp<br>254 Deer Valley Drive<br>Fort Hill PA 15540<br>(Mike)   | \$5,000.00   |
| 8/23/2012 | <b>Heinz History Center</b><br>Attn: Andrew E. Masich<br>1212 Smallman Street<br>Pittsburgh PA 15068-2318          | \$100,000.00 |
| 8/23/2012 | <b>Kiski Area Instrumental Boosters Inc</b><br>Attn: Helen Murray<br>P O Box 124<br>Vandergrift PA 15690           | \$500.00     |
| 8/23/2012 | <b>Vandergrift Public Library</b><br>128 C Washington Avenue<br>Vandergrift PA 15690                               | \$5,000.00   |

**Bozzone Family Foundation Contributions**  
**3rd Quarter 7/1/12 through 9/30/12**

| <b>DATE</b> | <b>INSTITUTION</b>                                                                                                                                         | <b>AMOUNT</b> |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| 8/23/2012   | <b>Goodwill Southwestern Pennsylvania</b><br>Workforce Development Center<br>Robert S Foltz Building<br>118 52 <sup>nd</sup> Street<br>Pittsburgh PA 15201 | \$1,000.00    |
| 8/30/2012   | <b>Western Pennsylvania Conservancy</b><br>Attn: Thomas D Saunders<br>900 Waterfront Drive<br>Pittsburgh, PA 15222                                         | \$4,000.00    |
| 9/13/2012   | <b>Diocese of Pittsburgh</b><br>Attn: Dr Patrick M. Joyce<br>111 Boulevard of the Allies<br>Pittsburgh PA 15222                                            | \$5,000.00    |
| 9/13/2012   | <b>Bakersville Volunteer Fire Dept</b><br>P O Box 722<br>Somerset PA 15501                                                                                 | \$500.00      |

|              |                     |
|--------------|---------------------|
| <b>TOTAL</b> | <b>\$126,000.00</b> |
|--------------|---------------------|

**Bozzone Family Foundation Contributions  
4th Quarter 10/1/12 through 12/31/12**

| DATE       | INSTITUTION                                                                                                                      | AMOUNT     |
|------------|----------------------------------------------------------------------------------------------------------------------------------|------------|
| 10/3/2012  | <b>Pittsburgh Public Theater</b><br>Attn: Ted Pappas<br>O'Reilly Theater<br>621 Penn Avenue<br>Pittsburgh PA 15222               | \$7,500.00 |
| 10/3/2012  | <b>Kinloch Meals on Wheels</b><br>P O Box 73<br>New Kensington PA 15068                                                          | \$500.00   |
| 10/16/2012 | <b>St. Joseph O'Hara Roman Catholic Church</b><br>Rev. Thomas R Miller<br>330 Dorseyville Road<br>Pittsburgh, PA 15215<br>(Mike) | \$3,000.00 |
| 10/16/2012 | <b>Younglives North Hills</b><br>c/o John C. Mouganis<br>1601 Field Stone Lane<br>Sewickley, PA 15143<br>(Mike)                  | \$3,200 00 |
| 10/22/2012 | <b>The Children's Institute</b><br>Attn: Ann M. McGuinn<br>1405 Shady Avenue<br>Pittsburgh PA 15217-1350                         | \$1,250.00 |
| 10/22/2012 | <b>Westmoreland County Food Bank Inc</b><br>Attn: Marlene Kozak<br>100 Devonshire Drive<br>Delmont PA 15626-1607                 | \$1,500.00 |
| 10/22/2012 | <b>Capuchin Development Center</b><br>Massaro Corporation<br>Attn: Maureen<br>120 Delta Drive<br>Pittsburgh PA 15238             | \$200 00   |

**Bozzone Family Foundation Contributions  
4th Quarter 10/1/12 through 12/31/12**

| DATE       | INSTITUTION                                                                                                                               | AMOUNT       |
|------------|-------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| 10/22/2012 | <b>Allegheny Valley YMCA</b><br>Attn: Gerald P DeMarco<br>5021 Freeport Road<br>Natrona Heights PA 15065                                  | \$5,000.00   |
| 10/22/2012 | <b>Homeless Children's Education Fund</b><br>Attn: Linda Dickerson<br>2100 Smallman Street 2 <sup>nd</sup> Floor<br>Pittsburgh PA 15222   | \$500.00     |
| 10/31/2012 | <b>Phipps Conservatory and Botanical Gardens</b><br>Attn: Susan Golomb<br>One Schenley Park<br>Pittsburgh, PA 15213-3830                  | \$1,000 00   |
| 11/2/2012  | <b>Junior Achievement</b><br>One Allegheny Center<br>Suite 430<br>Pittsburgh PA 15212                                                     | \$5,000.00   |
| 11/5/2012  | <b>Diocese of Greensburg</b><br>The Capital Endowment Campaign<br>ATTN: Matt Stoessel<br>723 E. Pittsburgh ST.<br>Greensburg, PA 15601    | \$375,000 00 |
| 11/6/2012  | S & T Bank<br><b>Giving Thanks</b><br>1077 Freeport Road<br>Pittsburgh PA 15238<br>(Mike)                                                 | \$1,000.00   |
| 11/6/2012  | <b>The Neighborhood Academy</b><br>Attn: Sheila Rawlings<br>709 N. Aiken Ave<br>Pittsburgh, PA 15224                                      | \$10,000 00  |
| 11/7/2012  | <b>University of Notre Dame</b><br>Development Office<br>Attn: Carol Hennion<br>1100 Grace Hall<br>Notre Dame, IN 46556-5612<br>(Mary Jo) | \$37,000.00  |

**Bozzone Family Foundation Contributions  
4th Quarter 10/1/12 through 12/31/12**

| DATE       | INSTITUTION                                                                                                                                                 | AMOUNT      |
|------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 11/7/2012  | <b>Phipps Conservatory and Botanical Gardens</b><br>One Schenley Park<br>Pittsburgh, PA 15213-3830<br>(Mary Jo)                                             | \$21,500.00 |
| 11/7/2012  | <b>Foxwall Emergency Medical Services</b><br>145 Squaw Run Road<br>Pittsburgh PA, 15238<br>(Mary Jo)                                                        | \$2,000.00  |
| 11/7/2012  | <b>Fox Chapel Volunteer Fire Department</b><br>401 Fox Chapel Road<br>Fox Chapel PA, 15238<br>(Mary Jo)                                                     | \$2,000.00  |
| 11/7/2012  | <b>Saint Scholastica</b><br>309 Brilliant Avenue<br>Pittsburgh PA 15215<br>(Mary Jo)                                                                        | \$8,000 00  |
| 11/7/2012  | <b>FCDA</b><br>P O Box 111595<br>Pittsburgh PA 15238<br>(Mary Jo)                                                                                           | \$2,000.00  |
| 11/7/2012  | The Pittsburgh Foundation<br><b>FCAH – Children First Foundation</b><br>c/o Kelly Uranker<br>5 PPG Place Suite 250<br>Pittsburgh PA 15222-5414<br>(Mary Jo) | \$2,500.00  |
| 11/13/2012 | <b>Animal Protectors of Allegheny Valley</b><br>533 Linden Avenue<br>New Kensington PA 15068                                                                | \$1,000 00  |
| 11/16/2012 | <b>Light of Life Rescue Mission</b><br>PO Box 6823<br>Pittsburgh, PA 15212-0823                                                                             | \$3,000.00  |
| 11/16/2012 | <b>Extra Mile Education Foundation</b><br>111 Boulevard of the Allies<br>Pittsburgh, PA 15222                                                               | \$5,000 00  |
| 11/23/2012 | <b>Strongland Chamber of Commerce</b><br>Attn: A Allan Walzak<br>1129 Industrial Park Road<br>Box 10 Suite 108<br>Vandergrift PA 15690-9646                 | \$1,000.00  |

**Bozzone Family Foundation Contributions  
4th Quarter 10/1/12 through 12/31/12**

| DATE       | INSTITUTION                                                                                                      | AMOUNT      |
|------------|------------------------------------------------------------------------------------------------------------------|-------------|
| 11/28/2012 | <b>Allegheny Valley Association of Churches</b><br>1913 Freeport Road<br>Natrona Heights, PA 15065               | \$1,000.00  |
| 11/28/2012 | <b>WQED</b><br>Attn: Deborah L Acklin<br>4802 Fifth Avenue<br>Pittsburgh PA 15213                                | \$500.00    |
| 11/29/2012 | <b>VNA Family Services</b><br>154 Hindman Road<br>Butler, PA 16001-2479                                          | \$1,000.00  |
| 12/4/2012  | <b>The Salvation Army Western PA Division</b><br>700 North Bell Ave.<br>PO Box 742<br>Carnegie, PA 15106         | \$5,000.00  |
| 12/4/2012  | <b>Pittsburgh Symphony Orchestra</b><br>Heinz Hall<br>600 Penn Ave.<br>Pittsburgh, PA 15222                      | \$1,000 00  |
| 12/13/2012 | <b>FAME</b><br>Fund for Advancement of Minorities Through Education<br>555 Morewood Ave.<br>Pittsburgh, PA 15213 | \$1,000.00  |
| 12/20/2012 | <b>St Margaret Mary Church</b><br>Attn: Rev James T Gaston<br>3055 Leechburg Rd<br>Lower Burrell, PA 15068       | \$18,000 00 |
| 12/27/2012 | <b>Ashbury Foundation</b><br>Mr. Matt McConnell<br>700 Bower Hill Road<br>Pittsburgh, PA 15243<br>(Mike)         | \$1,000.00  |
| 12/27/2012 | <b>North Hills Community Outreach</b><br>1975 Ferguson Road<br>Allison Park, PA 15101<br>(Mike)                  | \$3,000.00  |

**Bozzone Family Foundation Contributions  
4th Quarter 10/1/12 through 12/31/12**

| DATE       | INSTITUTION                                                                                                                                                                    | AMOUNT     |
|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 12/27/2012 | <b>Outreach Teen and Family Services</b><br>Attn: Stacie Sebastian<br>666 Washington Road<br>Pittsburgh, PA 15228<br>(Mike)                                                    | \$1,000.00 |
| 12/27/2012 | <b>Extra Mile Education Foundation</b><br>111 Boulevard of the Allies<br>Pittsburgh, PA 15222<br>(Mike)                                                                        | \$1,000.00 |
| 12/27/2012 | <b>YMCA Camp Kon-O-Kwee</b><br>126 Naugel Road<br>Fombell, PA 16123<br>(Mike)                                                                                                  | \$2,000.00 |
| 12/27/2012 | <b>Girls Hope of Pittsburgh</b><br>1020 State Street<br>Baden, PA 15005<br>(Mike)                                                                                              | \$1,000.00 |
| 12/27/2012 | <b>Family Resources</b><br>141 S. Highland Ave. Ste. 201<br>Pittsburgh, PA 15206<br>(Mike)                                                                                     | \$4,000.00 |
| 12/27/2012 | <b>National Federation of Independent Business</b><br>1201 F. Street N.W. , Ste. 200<br>Washington, D.C. 20004<br>(Mike)                                                       | \$1,000.00 |
| 12/27/2012 | <b>Juvenile Diabetes</b><br>Sean Moran, Esq.<br>Buchanan Ingersoll & Rooney<br>One Oxford Center, 20 <sup>th</sup> floor<br>301 Grant Street<br>Pittsburgh, PA 15219<br>(Mike) | \$1,000.00 |
| 12/27/2012 | <b>Allegheny Institute for Public Policy</b><br>305 Mt. Lebanon Blvd.<br>Pittsburgh, PA 15234<br>(Mike)                                                                        | \$2,000.00 |
| 12/27/2012 | <b>Heritage Foundation</b><br>214 Massachusetts Ave. N.E.<br>Washington, D.C. 20002-4999<br>(Mike)                                                                             | \$3,000.00 |

**Bozzone Family Foundation Contributions  
4th Quarter 10/1/12 through 12/31/12**

| DATE         | INSTITUTION                                                                                                                                | AMOUNT              |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| 12/27/2012   | <b>The Neighborhood Academy</b><br>Champion Commons<br>5231 Penn Ave. Ste. 200<br>Pittsburgh, PA 15224<br>(Mike)                           | \$1,000.00          |
| 12/27/2012   | <b>Rocky Mountain Children's Law Center</b><br>1325 S. Colorado Blvd.<br>Denver, CO 80220<br>(Mike)                                        | \$26,000.00         |
| 12/27/2012   | <b>Junior Achievement of Southwest PA</b><br>1 Allegheny Square, Ste. 430<br>Pittsburgh, PA 15212-5317<br>(Mike)                           | \$2,000 00          |
| 12/27/2012   | <b>White Fields Foundation</b><br>Attn: Dominican Division<br>c/o Kim Costanza<br>596 Callery Rd<br>Cranberry Township, PA 16066<br>(Mike) | \$3,621 50          |
| 12/27/2012   | <b>White Fields Foundation</b><br>Attn: Dominican Division<br>c/o Kim Costanza<br>596 Callery Rd<br>Cranberry Township, PA 16066<br>(Mike) | \$678.50            |
| <b>TOTAL</b> |                                                                                                                                            | <b>\$580,450.00</b> |