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Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation
Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements. OMB No 1545-0052 · Form 990-PF Department of the Treasury Internal Revenue Service For calendar year 2012 or tax year beginning and ending Name of foundation A Employer identification number WINTMAN FAMILY CHARITABLE TRUST B C/O BRUCE I WINTMAN 27-6664980 Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number 100 ASHFORD ROAD 413-933-2204 City or town, state, and ZIP code C If exemption application is pending, check here LONGMEADOW, MA 01106 G Check all that apply Initial return Initial return of a former public charity D 1. Foreign organizations, check here Final return Amended return Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation Check type of organization. E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust _____ Other taxable private foundation under section 507(b)(1)(A), check here Fair market value of all assets at end of year | J | Accounting method: Accrual If the foundation is in a 60-month termination Other (specify) (from Part II, col. (c), line 16) under section 507(b)(1)(B), check here 1,768,887. (Part I, column (d) must be on cash basis.) ▶\$ Part 1 Analysis of Revenue and Expenses (a) Revenue and (b) Net investment (c) Adjusted net (d) Disbursements (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) for chantable purposes (cash basis only) expenses per books income income Contributions, gifts, grants, etc., received 2 Check X If the foundation is not required to attach Sch. B Interest on savings and temporary cash investments 47,710 47,710. STATEMENT Dividends and interest from securities 5a Gross rents b Net rental income or (loss) 21,531 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 98,057. 21,531 7 Capital cain net income (from Part IV, line 2) 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) 11 Other income 69,241 69,241 0. 12 Total. Add lines 1 through 11 0. 0. 13 Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees 5,900 0 5,900. STMT 2 0. b Accounting fees c Other professional fees and Administrative 17 Interest STMT 3 846. 276. 0. 0. 18 19 Depreciation and depletion Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses Operating 24 Total operating and administrative 276. 6,746. 0. 5,900. expenses. Add lines 13 through 23 86,541 86,541 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 93,287 276 0 92,441 Add lines 24 and 25 27 Subtract line 26 from line 12:

b Net investment income (if negative, enter -0-)

C Adjusted net income (if negative, enter -0-)

223501
12-05-12 LHA For Paperwork Reduction Act Notice, see instructions.

2 Excess of revenue over expenses and disbursements

orm QQ0_DE /2012

0

68,965

<24,046.

Page 2

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	fyear
	(a) Book Value	(b) Book Value	(c) Fair Market Value
1 Cash - non-interest-bearing			
2 Savings and temporary cash investments			
3 Accounts receivable ►			
Less, allowance for doubtful accounts			
4 Pledges receivable ►			1110
Less, allowance for doubtful accounts	Ī		
5 Grants receivable			
6 Receivables due from officers, directors, trustees, and other			
disqualified persons 7 Other notes and loans receivable			
Less allowance for doubtful accounts	ŧ.		
			
8 Inventories for sale or use			
9 Prepaid expenses and deferred charges			
10a Investments - U.S. and state government obligations			
b Investments - corporate stock	9,163.	9,359.	19 , 870
c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis			
Less: accumulated depreciation			
12 Investments - mortgage loans			
13 Investments - other STMT 5	1,619,726.	1,593,801.	1,749,017
14 Land, buildings, and equipment basis	······································		
Less: accumulated depreciation		i	
15 Other assets (describe ►)			
To other assets (asserted >			
16 Total assets (to be completed by all filers)	1,628,889.	1 603 160	1,768,887
17 Accounts payable and accrued expenses	1/020/0031	1,005,100.	1,700,007
1			
1			
19 Deferred revenue			
20 Loans from officers, directors, trustees, and other disqualified persons			
21 Mortgages and other notes payable			
22 Other liabilities (describe >)			
	_		
23 Total liabilities (add lines 17 through 22)	0.	0.	
Foundations that follow SFAS 117, check here	:		
and complete lines 24 through 26 and lines 30 and 31.			
24 Unrestricted			
25 Temporarily restricted			:
26 Permanently restricted			
25 Temporarily restricted 26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances			
and complete lines 27 through 31.			
27 Capital stock, trust principal, or current funds	0.	0.	
28 Paid-in as capital surplus or land hide, and sequences find	0.	0.	
28 Paid-in or capital surplus, or land, bldg, and equipment fund	1,628,889.	1,603,160.	
29 Retained earnings, accumulated income, endowment, or other funds			
30 Total net assets or fund balances	1,628,889.	1,603,160.	
24 Tatal Babillan and not south if the	1 620 000	1 600 160	
31 Total liabilities and net assets/fund balances	1,628,889.	1,603,160.	
art 甜 Analysis of Changes in Net Assets or Fund Ba	lances		
Total net assets or fund balances at beginning of year - Part II, column (a), line 3			
	iu		1 629 000
(must agree with end-of-year figure reported on prior year's return)			1,628,889
Enter amount from Part I, line 27a		2	<24,046
Other increases not included in line 2 (demize)		3	0
Add lines 1, 2, and 3		4	1,604,843
Decreases not included in line 2 (itemize) ► COST BASIS ADJU		5	1,683
Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, col	umn (b), line 30	6	1,603,160
			Form 990-PF (2012

	BRUCE I			1				27-666	4980	Page 3
<u> </u>		property sold (e.g., r		income	(b) F	low acquired	(c) I	Date acquired	(d) Date	
2-story brick wa	rehouse; or comm	on stock, 200 shs. I			l P	Purchase Donation	(m	o , day, yr.)	(mo., da	y, yr.)
	DEX FUND			.	ļ	<u>P</u>		/19/10	11/26	
b 181 SHS DEVEL					<u> </u>	<u>P</u>		/19/10	11/26	
t 4,102 SHS INTE			ADM			P	10	/19/10	11/26	0/12
d CAPITAL GAINS	DIVIDEND	5					+			
<u> </u>	(f) Depreciat	ion allowed	(n) Cos	t or other basis	<u>'</u>			h) Gain or (loss)		
(e) Gross sales price	(or allo			xpense of sale				plus (f) minus (
a 30,000.				25,09					4	908.
ь 5,000.				5,16		- · · · <u>- · · · -</u> ·				162.
50,000.				46,27	2.					728.
d 13,057.									13,	057.
e Complete only for assets showing	o gain in column /	h) and owned by the	e foundation	on 12/31/69	\dashv		(I) Con			
(i) F.M.V. as of 12/31/69	(j) Adjust as of 12	ed basis	(k) Ex	cess of col (I) col (j), if any			col (k),	ns (Col. (h) gain but not less thar sses (from col. (1 -0-) or	
a									4	908.
b										162.
C										728.
_ d	 								13,	057.
e					_					
2 Capital gain net income or (net ca	pıtal loss) {	If gain, also enter in If (loss), enter -0- in			}	2			21	531.
3 Net short-term capital gain or (los if gain, also enter in Part I, line 8,	•	ections 1222(5) and	(6):		7			37 / 3		
If (loss), enter -0- in Part I, line 8 Part V Qualification U	nder Section	4940(a) for F	Reduced	Tay on Net	Inv	3 estment i	Incom	N/A		
(For optional use by domestic private							1110011			
		or to the section 43	40(a) tax on	net mvestment m	1001116	,				
If section 4940(d)(2) applies, leave the	ns part blank									
Was the foundation liable for the sec				-	nod?				Yes	X No
If 'Yes," the foundation does not qual					····					
1 Enter the appropriate amount in (a)	each column for ea		tructions bet	ore making any e		·	- 1		(d)	
Base period years Calendar year (or tax year beginnı	ag in) Adius	(b) sted qualifying distril	butions	Net value of no	(c) nchar	ıtable-use ass	sets	Distnb (col. (b) div	ution ratio	(a))
2011	ig iii)		,477.			,654,0		(cor. (b) div		22053
2010	···		,191.			,459,3				16577
2009						·				
2008										
2007										
2 Total of line 1, column (d)				· · · · · · · · · · · · · · · · · · ·				2	.03	38630
3 Average distribution ratio for the	-		line 2 by 5,	or by the number	of ye	ars			_	
the foundation has been in existen	nce if less than 5 y	ears		• •••	-		- -	3	.0	<u>19315</u>
4 Enter the net value of noncharitat	le-use assets for 2	2012 from Part X, lin	e5				. -	4	1,735	744.
5 Multiply line 4 by line 3		· ··					_	5	33	526.
6 Enter 1% of net investment incom	ne (1% of Part I, lir	ne 27b)						6		690.
7 Add lines 5 and 6						-	-	7	34	216.
8 Enter qualifying distributions from If line 8 is equal to or greater than		box in Part VI line 1	 h. and como	lete that nart usin	n a 1º	 % tax rate		8	92	441.
See the Part VI instructions			., and comp	ioto tilut part usiii	.g u 1					
223521 12-05-12								5	nm 990_E	E (2012)

Form	1990-PF (2012) C/O BRUCE I WINTMAN 27-0	<u>6664980</u>		Page 4
Pa	rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 -	see instn	uctio	ns)
1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1			
	Date of ruling or determination letter: (attach copy of letter if necessary-see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► X and enter 1%		6	90.
	of Part I, line 27b			
C	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			0.
3	Add lines 1 and 2		6	90.
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-	·····	6	90.
6	Credits/Payments:			
а	2012 estimated tax payments and 2011 overpayment credited to 2012 <u>6a</u> 917.			
b	Exempt foreign organizations - tax withheld at source			
C	Tax paid with application for extension of time to file (Form 8868)			
d	Backup withholding erroneously withheld			
7	Total credits and payments. Add lines 6a through 6d		9	<u>17.</u>
8	Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		2	27.
	Enter the amount of line 10 to be Credited to 2013 estimated tax ▶ 227 . Refunded ▶ 11			0.
	rt VII-A Statements Regarding Activities		7	
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in	<u></u>	Yes	No
	any political campaign?	. <u>1a</u>	ļ	X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	1b		X
	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.			1
	Did the foundation file Form 1120-POL for this year?	10	<u> </u>	X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year	}		
	(1) On the foundation. ► \$ 0 • (2) On foundation managers ► \$ 0 •			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation	}	-	
_	managers. ► \$O.			,,
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2	- 	X
_	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or			
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	. 4a	├ ─	
	• • • • • • • • • • • • • • • • • • • •	/A · 4b	+	X
อ	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	<u> </u>	<u> </u>
e	If "Yes," attach the statement required by General Instruction T.		1	
b	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either By language in the governing instrument, or		1	
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law			
	remain in the governing instrument?	. 6		X
7	Did the foundation have at least 65,000 in appets at any time during the year?		X	
•	If "Yes," complete Part II, col. (c), and Part XV.	· · · · · · · · · · · · · · · · · · ·	 •••	
Ra	Enter the states to which the foundation reports or with which it is registered (see instructions)	ŀ		
Va	MA		1	
h	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	86	Х	1
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	<u> </u>	† 	
-	year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	1	x
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		1	X

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	art 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)	1	1	х
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privilege if "Yes," attach statement (see instructions)	· · ·		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	1		
14	The books are in care of ▶ BRUCE I WINTMAN Telephone no ▶ 41	3-567-	-1007	
• •		4 ▶0110		
15	Section 4947(a)(1) nonexempt chantable trusts filing Form 990-PF in lieu of Form 1041 - Check here		•	<u> </u>
	and enter the amount of tax-exempt interest received or accrued during the year	1	N/A	
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	1	6	X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1. If "Yes," enter the name of the foreign			
	country			<u> </u>
P	art 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
18	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?	. No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	_		
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	-		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available	a		
	for the benefit or use of a disqualified person)? Yes	7 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	a.,		
	termination of government service, if terminating within 90 days)	7 NO		
	o If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	I/A 1	.	
		<u>'/</u>	b	
	Organizations relying on a current notice regarding disaster assistance check here			
ι			_	X
2	before the first day of the tax year beginning in 2012?		C	1
	defined in section 4942(j)(3) or 4942(j)(5)).			
,	a At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning			
•	before 2012?	O No		
	If "Yes," list the years ▶,,,,,			
ı	a Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect	ł		
	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)	I/A ;	.b	
	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
].		
3	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time		1	
	during the year?	☑ No	-	
1	the lf "Yes," did it have excess business holdings in 2012 as a result of (1) any purchase by the foundation or disqualified persons after	ŀ		
	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.)	I/A 📑	b	<u> </u>
4:	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4	a	X
ı	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?		b	X

0

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

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (contractors (contractors) (a) Name and address of each person paid more than \$50,000 (b) Type of service (c) Compensation NONE (b) Type of service (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others receiving over \$50,000 for professional services (c) Compensation NONE (c) Total number of others received number of oth	Form 990-PF (2012) C/O BRUCE I WINTMAN 2	<u> 27–6664</u>	<u>980 p</u>	age 7
(e) Name and address of each person paid more than \$50,000 (b) Type of service (c) Compensation NONE Total number of others receiving over \$50,000 for professional services O	Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)			
NONE Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities Let the foundations four largest direct charitable activities Let the foundations four largest direct charitable activities Let the foundation such as the expenses Let the foundation such as the expenses on the foundation of the foundation and the foundation of the foundation during the tax year on lines 1 and 2 Amount N/A All other program-related investments. See instructions All other program-related investments. See instructions Total. Add lines 1 through 3 ▶ 0.	3 Five highest-paid independent contractors for professional services. If none, enter "NONE."			
NONE Total number of others receiving over \$50,000 for professional services Part XV-A Summary of Direct Charitable Activities List the foundations four largest direct charitable activities Expenses I NOT APPLICABLE 2 Part XV-B Summary of Program-Related investments Part XV-B Summary of Program-Related investments	(a) Name and address of each person paid more than \$50,000 (b) Type of service	e	(c) Compen	sation
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities	NONE			
Part IX-A Summary of Direct Charitable Activities				
Part IX-A Summary of Direct Charitable Activities				
Part IX-A Summary of Direct Charitable Activities				
Part IX-A Summary of Direct Charitable Activities			-	
Part IX-A Summary of Direct Charitable Activities				
Part IX-A Summary of Direct Charitable Activities				
Part IX-A Summary of Direct Charitable Activities		ļ		
Part IX-A Summary of Direct Charitable Activities				
Part IX-A Summary of Direct Charitable Activities				
Part IX-A Summary of Direct Charitable Activities	Tabel number of others recenting over \$50,000 for professional continue			
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. 1 NOT APPLICABLE 2	Part IX-A Summary of Direct Charitable Activities	·	L	
number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. 1 NOT APPLICABLE 0 . 2	Line and the second sec			
1 NOT APPLICABLE 2 3 4 Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount 1 N/A 0. All other program-related investments. See instructions 3 Total. Add lines 1 through 3	number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.		Expenses	
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount N/A O. All other program-related investments. See instructions Total. Add lines 1 through 3				
2 Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount 1 N/A	THE			
2 Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount 1 N/A				Λ
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount 1 N/A 2 All other program-related investments. See instructions 3 Total. Add lines 1 through 3	2			
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount 1 N/A 2 All other program-related investments. See instructions 3 Total. Add lines 1 through 3	2			
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount 1 N/A 2 All other program-related investments. See instructions 3 Total. Add lines 1 through 3				
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount 1 N/A 2 All other program-related investments. See instructions 3 Total. Add lines 1 through 3	2			
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount 0. All other program-related investments. See instructions Total. Add lines 1 through 3	<u> </u>			
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount 0. All other program-related investments. See instructions Total. Add lines 1 through 3				
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount 0. All other program-related investments. See instructions Total. Add lines 1 through 3				
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 1 N/A 2 O . All other program-related investments. See instructions 3 Total. Add lines 1 through 3				
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 1 N/A 2 O . All other program-related investments. See instructions 3 Total. Add lines 1 through 3				
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 1 N/A 2 O . All other program-related investments. See instructions 3 Total. Add lines 1 through 3	Part IX-B Summary of Program-Related Investments			
1 N/A 2			Amount	
All other program-related investments. See instructions Total. Add lines 1 through 3				
All other program-related investments. See instructions Total. Add lines 1 through 3 O.	1 47	—		
All other program-related investments. See instructions Total. Add lines 1 through 3 O.		 		0.
All other program-related investments. See instructions Total. Add lines 1 through 3 O.	2			
3		—		
3				
3	All other program-related investments. See instructions			
Total. Add lines 1 through 3 ▶ 0.	• •			
	<u> </u>			
	Total, Add lines 1 through 3	D		0.
			m 990-PF	

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	dations,	see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		· · · · · · · · · · · · · · · · · · ·
а	Average monthly fair market value of securities	1a	1,762,177. 0.
b	Average of monthly cash balances	1b	0.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,762,177.
е			
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	_2	0.
3	Subtract line 2 from line 1d	3	1,762,177.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	26,433.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,735,744.
6	Minimum investment return. Enter 5% of line 5	6	86,787.
P	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part.)	d certain	
1	Minimum investment return from Part X, line 6	1	86,787.
2a	Tax on Investment income for 2012 from Part VI, line 5		<u> </u>
b	Income tax for 2012. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	690.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	86,097.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	86,097.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	86,097
	art XII Qualifying Distributions (see instructions)	<u>-</u>	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	92,441.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	92,441
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
-	Income Enter 1% of Part I, line 27b	5	690
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	91,751
-	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of	ualifies fo	· · · · · · · · · · · · · · · · · · ·
	AQAO(a) reduction of tay in those years	,	

Form **990-PF** (2012)

Form 990-PF (2012)

C/O BRUCE I WINTMAN

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Inin 7					
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	art XIV Private Operating Fo	LAMININA L A.		A question 0	1	21-	-0004980	Page 10
				A, question s	') 	-		
1 6	a If the foundation has received a ruling or o		· · · · · · · · · · · · · · · · · · ·	_	111/	09/09		
	foundation, and the ruling is effective for the Chapter have to indicate whether the foundation	•	- · · · · · · · · · · · · · · · · · · ·	>	11/	4942(j)(3) or	4040/()/(5)	
	b Check box to indicate whether the founda a Enter the lesser of the adjusted net		y iounuation described	Prior 3 ye	215	4942())(3) 01 L	4942(j)(5)	
٠.	income from Part I or the minimum	Tax year (a) 2012	(b) 2011	(c) 201		(d) 2009	(e)	Total
	investment return from Part X for	(4) - 5 · 1	(2) 20 11			(2) 2000		
,	L 050/ -415 0-							
	© Qualifying distributions from Part XII,							 "
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,	d Amounts included in line 2c not							
•	used directly for active conduct of							
	exempt activities							
6	e Qualifying distributions made directly							
•	for active conduct of exempt activities.			İ				
	Subtract line 2d from line 2c							
3	Complete 3a, b, or c for the							
	alternative test relied upon a "Assets" alternative test - enter			İ				
•	(1) Value of all assets							
	(2) Value of assets qualifying							
	under section 4942(j)(3)(B)(i)	· · · · · · · · · · · · · · · · · · ·		_				
t	b "Endowment" alternative test - enter							
	2/3 of minimum investment return shown in Part X, line 6 for each year listed							
C	c "Support" alternative test - enter							
	(1) Total support other than gross						1	
	investment income (interest,						ļ	
	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 .							
D.	(4) Gross investment income art XV Supplementary Infor	mation (Comple	te this part only	if the four	dation	had \$5,000 o	r more in a	ecote
•••	at any time during th	•		ii tiio ioui.	dulion	1100 40,000 0	inore in a	33013
1	Information Regarding Foundation		<u> </u>					
1	a List any managers of the foundation who	have contributed more	than 2% of the total con	ributions receiv	ed by the	foundation before t	he close of any ta	ıx
	year (but only if they have contributed mo	ore than \$5,000). (See s	ection 507(d)(2).)					
NC	ONE							
ı	b List any managers of the foundation who			(or an equally la	irge porti	on of the ownership	of a partnership	or
	other entity) of which the foundation has	a 10% or greater interes	Sl.					
	ONE							
2	Information Regarding Contribution Check here ► if the foundation on				nd doso s	ot coccet use aliaite	d coourage for fu	nda If
	the foundation makes gifts, grants, etc. (s							iius. ii
	a The name, address, and telephone numb		· · · · · · · · · · · · · · · · · · ·				, , ,	
,	a marrio, address, and telephone numb	o. or o man or me perso	to whom applications					
	b The form in which applications should be	submitted and informa	tion and materials they s	hould include:				
	c Any submission deadlines						_	
	d Any restrictions or limitations on awards,	such as by geographic	al areas, charitable fields	kinds of institu	tions. or	other factors:		
	=, roomana or immunona on arraida,	and the state of t	onanabio nolos	,oo or moute				
	601 12-05-12	······································				 	Form 004	0-PF (2012)

Form 990-PF (2012) C/O BRUCE I WINTMAN
Part XV Supplementary Information (continued) C/O BRUCE I WINTMAN

3 Grants and Contributions Paid During the		Payment		
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or contribution	
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	status of recipient	contribution	Amount
a Paid during the year				
MISCELLANEOUS CHARITABLE				
ORGANIZATIONS - SEE ATTACHED				86,541.
				· · · · · · · · · · · · · · · · · · ·
				
				· · · · · · · · · · · · · · · · · · ·
Total			3a	86,541.
b Approved for future payment				
NONE				
NONE				
Total	· · · · · · · · · · · · · · · · · · ·	<u></u>	. D 3b	0.

C/O BRUCE I WINTMAN

Enter gross amounts unless otherwise indicated	Unrelated	business income		y section 512, 513, or 514	(e)
-	(a) Business	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
1 Program service revenue: a NONE	code		Code		
b					
d					
u			1 1		
1			1 -1		
g Fees and contracts from government agencies					· · · · · · · · · · · · · · · · · · ·
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
in and an article					
4 Dividends and interest from securities	\		14	47,710.	
5 Net rental income or (loss) from real estate:	 			1777100	
	 				
a Debt-financed property		<u> </u>	+		
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property	<u> </u>				· · · · · · · · · · · · · · · · · · ·
7 Other investment income					
8 Gain or (loss) from sales of assets other	1		1.4	12 057	0.474
than inventory			14	13,057.	8,474.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue	1				
a					
b					
c	 				
d					
e					·
12 Subtotal Add columns (b), (d), and (e)		(0.		8,474.
13 Total. Add line 12, columns (b), (d), and (e)				13	69,241.
(See worksheet in line 13 instructions to verify calculations)					
Part XVI-B Relationship of Activities to	o the Acco	mplishment of	Exempt P	urposes	
Line No. Explain below how each activity for which incor				importantly to the accom	plishment of
the foundation's exempt purposes (other than I	by providing tun	as for such purposes)	•		
NOT APPLICABLE		····			
					
		- ···			
	<u> </u>				
					
					
					
					
223621 12-05-12					Form 990-PF (2012)

C/O BRUCE I WINTMAN

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Part XVII	Information Re Exempt Organ		fers To a	and Tran	sactions a	nd Relations	hips With Noncha	itable)	4
1 Did the	organization directly or indi		f the following	g with any o	ther organizatio	n described in sect	on 501(c) of	T	Yes	No
	(other than section 501(c)			-	_					
	a Transfers from the reporting foundation to a noncharitable exempt organization of									
(1) Cas			-	_				1a(1)		X
	er assets						• • • • • • • • • • • • • • • • • • • •	1a(2)		X
	insactions:	• • • •						1.4.2/		
	es of assets to a noncharita	hle exemnt omanizatio	on					1b(1)		X
	chases of assets from a no							1b(2)		X
	tal of facilities, equipment,							1b(3)		X
	mbursement arrangements							1b(4)		$\frac{x}{x}$
	ns or loan guarantees								-	X
	formance of services or me	mhamhin ar fundmisi						1b(5)		X
			=			• • • • • • • • • • • • • • • • • • • •	• • • • • • • • • • • • • • • • • • • •	1b(6)	-	$\frac{\Lambda}{X}$
-	of facilities, equipment, ma	-						10		
or service	swer to any of the above is ses given by the reporting fo (d) the value of the goods,	oundation If the found	dation receive				_		seis,	
(a) Line no	(b) Amount involved	(c) Name of n		e exempt or	ianization	(d) Description	of transfers, transactions, and	shanno ar	ranceme	nte.
,-,	127	(-)	N/A		,	127 2000112401			yG118	
						 		-		
										
							· · · · · · · · · · · · · · · · · · ·			
					,					
				-		 		•		
	<u> </u>									
							 			
	 									
		•								
										
										
										
ın sectio	undation directly or indirec n 501(c) of the Code (othe complete the following sch	r than section 501(c)(zations described		Yes	X	
	(a) Name of org			(b) Type (of organization		(c) Description of relations	nip		
	N/A									
	er penalties of perjury, I declare belief, it is true, correct, and cor			n taxpayer) is			r has any knowledge. Marett sho	y the IRS Im with the win below	discuss le prepar	
	gnature of officer or trustee	7 11 11		Date		Title			· L	J No
	Print/Type preparer's na		Preparer's si			0-4-	Check if PTIN			
			//	.g		Date 0 3 201	self- employed			
Paid	KEITH E.OA	TES	Sui	TE	-60			0448	607	
Preparer			T.T.D			<u>.</u>	Firm's EIN ▶ 86-1			
Use Only		CTITE INV	ئة ليد بيد				1 mm 2 mm > 00 - 1		1 4	
Oing	Firm's address ▶ 20	O BEDKETES	V CUDE	ידים			 			
	1	STON, MA		I I			Phone no 617-	127	200	n
	ВО	DION, PIA	7 <u>7</u> 1 1 U					m 991		

FORM 990-PF DIVIDEND	S AND	INTER	EST FRO	M SECUI	RITIES	ST	ATEMENT	1
SOURCE		GROSS	AMOUNT		ITAL GAINS IVIDENDS	C	OLUMN (A))
VANGUARD	•		60,767	•	13,057.		47,710.	
TOTAL TO FM 990-PF, PART I, I	LN 4		60,767		13,057.		47,7	10.
FORM 990-PF	AC	COUNTI	NG FEES			ST	ATEMENT	2
DESCRIPTION	EXPE	A) NSES BOOKS	(B NET IN MENT I	VEST-	(C) ADJUSTED NET INCOM		(D) CHARITAI PURPOSI	
TAX PREPARATION		5,900.		0.		0.	5,9	00.
TO FORM 990-PF, PG 1, LN 16B		5,900.		0.		0.	5,9	00.
FORM 990-PF		TAX	ES			ST	ATEMENT	3
DESCRIPTION	EXPE	A) NSES BOOKS	(B NET IN MENT I	VEST-	(C) ADJUSTEI NET INCOM		(D) CHARITA PURPOS	
FOREIGN TAXES MASSACHUSETTS TAXES		276. 570.		276. 0.		0.		0.
TO FORM 990-PF, PG 1, LN 18		846.		276.		0.		0.
FORM 990-PF	СО	RPORAT	E STOCK	·		ST	ATEMENT	4
DESCRIPTION				во	OK VALUE	FA	IR MARKE VALUE	T
DDOWED AGE AGGERG				-	9,359.		10.0	70
BROKERAGE ASSETS					9,339.		19,8	,

FORM 990-PF OTH	ER INVESTMENTS		STATEMENT	5
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	! :
VANGUARD FUNDS VANGUARD FUNDS	COST	1,452,216. 141,585.	1,609,75 139,26	
TOTAL TO FORM 990-PF, PART II, LIN	E 13	1,593,801.	1,749,01	7.

6

FORM 990-PF

ELECTION UNDER REGULATIONS SECTION
53.4942(A)-3(D)(2) TO APPLY
EXCESS QUALIFYING DISTRIBUTIONS
TO PRIOR YEAR'S UNDISTRIBUTED INCOME

STATEMENT

\$10,239 OF THE EXCESS CONTRIBUTON FROM 2012 IS BEEN APPLIED TOWARDS THE PRIOR YEAR'S UNDISTRIBUTED INCOME.

WINTMAN FAMILY CHARITABLE TRUST B EIN 27-6664980 12/31/2012

CHECK

#	DESCRIPTION	RELATIONSHIP	STATUS PURPOSE	AMOUNT
	Smile Train	NONE	PUBLIC CHARITY PUBLIC WELFARE	50
103	Special Olympics	NONE	PUBLIC CHARITY PUBLIC WELFARE	50
105	Fresh Air Fund	NONE	PUBLIC CHARITY PUBLIC WELFARE	50
	Salvation Army	NONE	PUBLIC CHARITY PUBLIC WELFARE	50
	North American Conference on Ethiopian Jewry	NONE	PUBLIC CHARITY RELIGIOUS	50
	Simon Wiesenthal Center	NONE	PUBLIC CHARITY PUBLIC WELFARE	50
	Hebrew Free Loan Association	NONE	PUBLIC CHARITY PUBLIC WELFARE	50
	Foundation for International Community Assistance	NONE	PUBLIC CHARITY PUBLIC WELFARE	50
	Mother Woman Fund Red Cross	NONE	PUBLIC CHARITY PUBLIC WELFARE	100
	Middle East Media Research Institute	NONE NONE	PUBLIC CHARITY MEDICAL	100
	Pesticide Action Network	NONE	PUBLIC CHARITY PUBLIC WELFARE PUBLIC CHARITY PUBLIC WELFARE	250
	Sierra Club	NONE	PUBLIC CHARITY PUBLIC WELFARE	250 500
	National Parks Conservation Association	NONE	PUBLIC CHARITY PUBLIC WELFARE	500
	SKLC Ad Book	NONE	PUBLIC CHARITY PUBLIC WELFARE	150
	Jewish Family Services of Western Massachusetts	NONE	PUBLIC CHARITY PUBLIC WELFARE	36
	Williston	NONE	PUBLIC CHARITY PUBLIC WELFARE	25
	Heritage Academy	NONE	PUBLIC CHARITY EDUCATION	480
205	Hillel House	NONE	PUBLIC CHARITY RELIGIOUS	500
206	SPLC	NONE	PUBLIC CHARITY PUBLIC WELFARE	1,000
207	Abortion Rights Fund	NONE	PUBLIC CHARITY PUBLIC WELFARE	250
210	SRM	NONE	PUBLIC CHARITY PUBLIC WELFARE	50
	USO	NONE	PUBLIC CHARITY PUBLIC WELFARE	250
	Weselyan University	NONE	PUBLIC CHARITY EDUCATION	250
	Habitat for Humanity	NONE	PUBLIC CHARITY PUBLIC WELFARE	100
	Greenpeace	NONE	PUBLIC CHARITY PUBLIC WELFARE	100
	Rails to Trails	NONE	PUBLIC CHARITY PUBLIC WELFARE	50
	Women's fund	NONE	PUBLIC CHARITY PUBLIC WELFARE	100
	Union of Concerned Scientists	NONE	PUBLIC CHARITY PUBLIC WELFARE	250
	Temple Beth El Amnesty International	NONE	PUBLIC CHARITY RELIGIOUS	2,000
	Planned Parenthood	NONE NONE	PUBLIC CHARITY PUBLIC WELFARE PUBLIC CHARITY EDUCATION	250
	AJW Services	NONE	PUBLIC CHARITY PUBLIC WELFARE	250
	Gray House	NONE	PUBLIC CHARITY PUBLIC WELFARE	100 250
	American Civil Liberties Union	NONE	PUBLIC CHARITY PUBLIC WELFARE	250
	Aesculapian Club	NONE	PUBLIC CHARITY PUBLIC WELFARE	50
231	Springfield Public Forum	NONE	PUBLIC CHARITY PUBLIC WELFARE	60
232	Israel Project	NONE	PUBLIC CHARITY PUBLIC WELFARE	250
233	Nmash	NONE	PUBLIC CHARITY PUBLIC WELFARE	100
234	Williston	NONE	PUBLIC CHARITY PUBLIC WELFARE	1,000
235	Putney School	NONE	PUBLIC CHARITY PUBLIC WELFARE	1,000
	Phillips Andover Academy	NONE	PUBLIC CHARITY PUBLIC WELFARE	1,000
	Baystate Health Foundation	NONE	PUBLIC CHARITY MEDICAL	50
	Lander Grinspoon Academy	NONE	PUBLIC CHARITY EDUCATION	100
	CRINE	NONE	PUBLIC CHARITY MEDICAL	250
	AFSH	NONE	PUBLIC CHARITY MEDICAL	250
	Jewish Genatric Service	NONE	PUBLIC CHARITY PUBLIC WELFARE	250
	Orthopedic Research and Education Foundation	NONE	PUBLIC CHARITY EDUCATION	250
	Camp Becket YMCA Harvard Medical School	NONE	PUBLIC CHARITY PUBLIC WELFARE	50,000
	Drama Studio	NONE	PUBLIC CHARITY EDUCATION	1,000
	Forest Park	NONE NONE	PUBLIC CHARITY EDUCATION PUBLIC CHARITY PUBLIC WELFARE	250
	Harvard College	NONE		250
251		NONE	PUBLIC CHARITY EDUCATION PUBLIC CHARITY PUBLIC WELFARE	100
	Jewish Community Center	NONE	PUBLIC CHARITY PUBLIC WELFARE	2,000 540
	New Israel Fund	NONE	PUBLIC CHARITY PUBLIC WELFARE	2,000
	Holocaust Museum	NONE	PUBLIC CHARITY CULTURAL	2,000 500
	United Way	NONE	PUBLIC CHARITY PUBLIC WELFARE	2,000
	Food Bank	NONE	PUBLIC CHARITY PUBLIC WELFARE	500
	Friends of the Homeless	NONE	PUBLIC CHARITY PUBLIC WELFARE	500
	Anti-Defamation League	NONE	PUBLIC CHARITY PUBLIC WELFARE	1,000
	NRDC	NONE	PUBLIC CHARITY PUBLIC WELFARE	250
262	Open Pantry	NONE	PUBLIC CHARITY PUBLIC WELFARE	500
	Sandy Relief Fund at the Jewish Federation of Western Mass	NONE	PUBLIC CHARITY PUBLIC WELFARE	1,000
	Rachael's Table	NONE	PUBLIC CHARITY PUBLIC WELFARE	600
	Marshall Table Fund	NONE	PUBLIC CHARITY PUBLIC WELFARE	500
266		NONE	PUBLIC CHARITY PUBLIC WELFARE	9,600
267	Center for Human Development	NONE	PUBLIC CHARITY MEDICAL	500
	TOTAL CONTRIBUTIONS	•		86,541