Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2012

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

Name of foundation: RIFKIN FAMILY FOUNDATION

A Employer identification number: 31-1192429

Number and street (or P O box number if mail is not delivered to street address): 5642 COVENTRY LANE — Room/suite:

B Telephone number (see the instructions): (260) 432-2233

City or town: FORT WAYNE — State: IN — ZIP code: 46804

C If exemption application is pending, check here ☐

G Check all that apply: ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1 Foreign organizations, check here ☐

2 Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

I Fair market value of all assets at end of year (from Part II, column (c), line 16) ► $ 8,421,602.

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I **Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)	**(a)** Revenue and expenses per books	**(b)** Net investment income	**(c)** Adjusted net income	**(d)** Disbursements for charitable purposes (cash basis only)
REVENUE				
1 Contributions, gifts, grants, etc, received (att sch)	10,000.			
2 Ck ► ☐ if the foundn is **not** req to att Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	147,726.	105,757.		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain/(loss) from sale of assets not on line 10	48,012.	L-6a Stmt		
b Gross sales price for all assets on line 6a 10,670,988.				
7 Capital gain net income (from Part IV, line 2)		48,012.		
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/(loss) (att sch)				
11 Other income (attach schedule)				
12 **Total.** Add lines 1 through 11	205,738.	153,769.		
OPERATING AND ADMINISTRATIVE EXPENSES				
13 Compensation of officers, directors, trustees, etc				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach sch)				
c Other prof fees (attach sch) L-16c Stmt	52,025.	52,025.		
17 Interest				
18 Taxes (attach schedule)(see instrs) FOREIGN TAX PAID	851.	851.		
19 Depreciation (attach sch) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)				
24 **Total operating and administrative expenses.** Add lines 13 through 23	52,876.	52,876.		
25 Contributions, gifts, grants paid	318,750.			318,750.
26 **Total expenses and disbursements.** Add lines 24 and 25	371,626.	52,876.		318,750.
27 Subtract line 26 from line 12:				
a **Excess of revenue over expenses and disbursements**	-165,888.			
b **Net investment income** (if negative, enter -0-)		100,893.		
c **Adjusted net income** (if negative, enter -0-)				

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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 (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
ASSETS	1 Cash – non-interest-bearing			
	2 Savings and temporary cash investments			
	3 Accounts receivable ►			
	Less: allowance for doubtful accounts ►			
	4 Pledges receivable ►			
	Less allowance for doubtful accounts ►			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach sch) ►			
	Less allowance for doubtful accounts ►			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U.S and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule)			
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment basis ►			
	Less: accumulated depreciation (attach schedule) ►			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule) L-13 Stmt	8,577,427.	8,421,448.	8,421,602.
	14 Land, buildings, and equipment basis ►			
	Less: accumulated depreciation (attach schedule) ►			
	15 Other assets (describe ►)			
	16 **Total assets** (to be completed by all filers – see the instructions Also, see page 1, item I)	8,577,427.	8,421,448.	8,421,602.
LIABILITIES	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ►)			
	23 **Total liabilities** (add lines 17 through 22)			
NET ASSETS OR FUND BALANCES	**Foundations that follow SFAS 117, check here ► and complete lines 24 through 26 and lines 30 and 31.** ☐			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ► and complete lines 27 through 31. X			
	27 Capital stock, trust principal, or current funds	3,178,580.	2,816,954.	
	28 Paid-in or capital surplus, or land, building, and equipment fund	3,103,035.	3,260,670.	
	29 Retained earnings, accumulated income, endowment, or other funds	2,295,812.	2,343,824.	
	30 **Total net assets or fund balances** (see instructions)	8,577,427.	8,421,448.	
	31 **Total liabilities and net assets/fund balances** (see instructions)	8,577,427.	8,421,448.	

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	8,577,427.
2	Enter amount from Part I, line 27a	2	-165,888.
3	Other increases not included in line 2 (itemize) ► ADJUSTMENT TO COST BASIS	3	9,909.
4	Add lines 1, 2, and 3	4	8,421,448.
5	Decreases not included in line 2 (itemize) ►	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	8,421,448.

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 shares MLC Company)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a	.24 SHARES EXPRESS SCRIPTS HLDG CO	P	05/16/11	04/03/12
b	404 SHARES MEDCO HEALTH SOLUTIONS INC	P	Various	04/03/12
c	WELLS FARGO A/C 8117 ST COVERED	P	Various	Various
d	WELLS FARGO A/C 8117 ST NONCOVERED	P	Various	Various
e	See Columns (a) thru (d)			

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	14.		13.	1.
b	30,028.		24,644.	5,384.
c	7,597,129.		7,377,957.	219,172.
d	413,541.		419,016.	-5,475.
e	See Columns (e) thru (h)		2,801,346.	-171,070.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a				1.
b	0.	0.	0.	5,384.
c	0.	0.	0.	219,172.
d				-5,475.
e	See Columns (i) thru (l)	0.	0.	-171,070.

2	Capital gain net income or (net capital loss) — If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7	2	48,012.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	3	218,970.

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2011	392,111.	8,633,795.	0.045416
2010	439,449.	8,245,852.	0.053293
2009	136,699.	8,007,651.	0.017071
2008	415,134.	7,450,389.	0.055720
2007	204,502.	7,621,474.	0.026832

2	**Total** of line 1, column (d)	2	0.198332
3	Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.039666
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	8,412,677.
5	Multiply line 4 by line 3	5	333,697.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,009.
7	Add lines 5 and 6	7	334,706.
8	Enter qualifying distributions from Part XII, line 4	8	318,750.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

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

1 a 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 instrs)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► ☐ and enter 1% of Part I, line 27b		1	2,018.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	2,018.
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	2,018.
6 Credits/Payments:			
a 2012 estimated tax pmts and 2011 overpayment credited to 2012	6a 82.		
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c 3,250.		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d		7	3,332.
8 Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ►		9	
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ►		10	1,314.
11 Enter the amount of line 10 to be: **Credited to 2013 estimated tax** ► 1,314.	**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?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see the 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*			
c Did the foundation file **Form 1120-POL** for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation ► $ ______ **(2)** On foundation managers ► $ ______			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► $ ______			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? *If 'Yes,' attach a detailed description of the activities*	2		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*	3		X
4 a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If 'Yes,' has it filed a tax return on **Form 990-T** for this year?	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If 'Yes,' attach the statement required by General Instruction T*	5		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7 Did the foundation have at least $5,000 in assets at any time during the year? *If 'Yes,' complete Part II, column (c), and Part XV*	7	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) ► IN - Indiana			
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If 'No,' attach explanation*	8b	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*	9		X
10 Did any persons become substantial contributors during the tax year? *If 'Yes,' attach a schedule listing their names and addresses*	10		X

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

			Yes	No
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 ► N/A

14 The books are in care of ► JENNIFER L. WILSON Telephone no. ► (260) 432-2233

Located at ► 5642 COVENTRY LANE FORT WAYNE IN ZIP + 4 ► 46804-7140

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** – Check here ► ☐

and enter the amount of tax-exempt interest received or accrued during the year ► 15

			Yes	No
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		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 ►			

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
1 a	During the year did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is 'Yes' to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		1 b		
	Organizations relying on a current notice regarding disaster assistance check here ► ☐				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?		1 c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?	☐ Yes ☒ No			
	If 'Yes,' list the years ► 20__ , 20__ , 20__ , 20__				
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)		2 b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ► 20__ , 20__ , 20__ , 20__				
3 a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If 'Yes,' did it have excess business holdings in 2012 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012)*		3 b		
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4 a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?		4 b		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

		Yes	No
5a During the year did the foundation pay or incur any amount to			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No			
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No			
(4) Provide a grant to an organization other than a charitable, etc, organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No			
b If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b		
Organizations relying on a current notice regarding disaster assistance check here ► ☐			
c If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No *If 'Yes,' attach the statement required by Regulations section 53 4945-5(d)*			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ 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		X
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
DANIEL M. RIFKIN 5642 COVENTRY LANE FORT WAYNE IN 46804	TRUSTEE 0.50	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 ► None

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

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

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

Part IX-A Summary of Direct Charitable Activities

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

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes:			
a	Average monthly fair market value of securities		1a	6,799,460.
b	Average of monthly cash balances		1b	1,741,329.
c	Fair market value of all other assets (see instructions)		1c	
d	**Total** (add lines 1a, b, and c)		1d	8,540,789.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e		
2	Acquisition indebtedness applicable to line 1 assets		2	
3	Subtract line 2 from line 1d		3	8,540,789.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)		4	128,112.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	8,412,677.
6	**Minimum investment return.** Enter 5% of line 5		6	420,634.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ► ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6		1	420,634.
2a	Tax on investment income for 2012 from Part VI, line 5	2a 2,018.		
b	Income tax for 2012 (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	2,018.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	418,616.
4	Recoveries of amounts treated as qualifying distributions		4	
5	Add lines 3 and 4		5	418,616.
6	Deduction from distributable amount (see instructions)		6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	418,616.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes		
a	Expenses, contributions, gifts, etc – total from Part I, column (d), line 26	1a	318,750.
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
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	318,750.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	0.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	318,750.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				418,616.
2 Undistributed income, if any, as of the end of 2012:				
a Enter amount for 2011 only			201,298.	
b Total for prior years 20 __, 20 __, 20 __				
3 Excess distributions carryover, if any, to 2012				
a From 2007 — 0.				
b From 2008 — 0.				
c From 2009 — 0.				
d From 2010 — 0.				
e From 2011 — 0.				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2012 from Part XII, line 4 ► $ 318,750.				
a Applied to 2011, but not more than line 2a			201,298.	
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2012 distributable amount				117,452.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2012 *(If an amount appears in column (d), the same amount must be shown in column (a).)*				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2011. Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				301,164.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)	0.			
9 **Excess distributions carryover to 2013.** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9.				
a Excess from 2008 — 0.				
b Excess from 2009 — 0.				
c Excess from 2010 — 0.				
d Excess from 2011 — 0.				
e Excess from 2012 — 0.				

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

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

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

	Tax year	Prior 3 years			
	(a) 2012	(b) 2011	(c) 2010	(d) 2009	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a 'Assets' alternative test – enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c 'Support' alternative test – enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV | Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year – see instructions.)

1 **Information Regarding Foundation Managers:**

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

N/A

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

N/A

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs:**

Check here ► [X] 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

N/A

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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
BE A STAR FOUNDATION 1201 U S HIGHWAY 1 STE 350A NORTH PALM BEACH FL 33408		501(C)3	PEDIATRIC ONCOLOGY SUPPORT	5,000.
BLESSINGS IN A BACK PACK 111 EAST WAYNE ST STE 555 FORT WAYNE IN 46802		501(C)3	ASSISTS IN NUTRITIONAL NEEDS FOR CHILDREN	16,000.
CONGREGATION ACHDUTH VESHOLOM 5200 OLD MILL ROAD FORT WAYNE IN 46807		501(C)3	RELIGIOUS	17,600.
CONGREGATION B'NAI JACOB 7227 BITTERSWEET MOORS DR FORT WAYNE IN 46814		501(C)3	RELIGIOUS	10,000.
ERIN'S HOUSE FOR GRIEVING CHILDREN 3811 ILLINOIS RD STE 205 FORT WAYNE IN 46804		501(C)3	BEREAVEMENT SUPPORT SERVICES	5,000.
FORT WAYNE CENTER FOR LEARNING 3310 MALLARD COVE LANE FORT WAYNE IN 46804		501(C)3	EDUCATION LEARNING DISADVANTAGED CHILDREN	5,000.
FRANCINE'S FRIENDS 709 CLAY ST #300 FORT WAYNE IN 46802		501(C)3	MAMMOGRAPHY SCREENING	1,000.
INDIANA UNIVERSITY FOUNDATION P O BOX 2298 BLOOMINGTON IN 47402		501(C)3	EDUCATION	15,000.
JUNIOR ACHIEVEMENT OF NORTHERN INDIANA 601 NOBLE DRIVE FORT WAYNE IN 46825		501(C)3	EDUCATION SCHOLARSHIP FUND	3,000.
See Line 3a statement				241,150.
Total			► 3a	318,750.
b Approved for future payment				
Total			► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	147,726.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	48,012.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue.					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				195,738.	

13 **Total.** Add line 12, columns (b), (d), and (e) 13 195,738.

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
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?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash	1 a (1)		X
(2) Other assets	1 a (2)		X
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1 b (1)		X
(2) Purchases of assets from a noncharitable exempt organization	1 b (2)		X
(3) Rental of facilities, equipment, or other assets	1 b (3)		X
(4) Reimbursement arrangements	1 b (4)		X
(5) Loans or loan guarantees	1 b (5)		X
(6) Performance of services or membership or fundraising solicitations	1 b (6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1 c		X

d If the answer to any of the above is 'Yes,' complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line no.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

b If 'Yes,' complete the following schedule.

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

Sign Here

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

Signature of officer or trustee | Date 7/30/13 | Title TRUSTEE

May the IRS discuss this return with the preparer shown below (see instructions)? ☐ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Firm's name ►			Firm's EIN ►	
Firm's address ►			Phone no	

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2012

Name of the organization
RIFKIN FAMILY FOUNDATION

Employer identification number
31-1192429

Organization type (check one)·

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)(____) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

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

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

General Rule

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

Special Rules

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

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

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

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

Name of organization	Employer identification number
RIFKIN FAMILY FOUNDATION	31-1192429

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	MEZUMAN ASSOCIATES LLC 1620 26TH STREET STE 1060N SANTA MONICA CA 90404	$ 10,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)

Form 990-PF Part I, Line 6a	Net Gain or Loss From Sale of Assets	2012

Name	Employer Identification Number
RIFKIN FAMILY FOUNDATION	31-1192429

Asset Information:

Description of Property: UBS
Date Acquired: Various — How Acquired: Purchased
Date Sold: Various — Name of Buyer:
Sales Price: 30,088. — Cost or other basis (do not reduce by depreciation): 24,763.
Sales Expense: — Valuation Method:
Total Gain (Loss): 5,325. — Accumulation Depreciation:

Description of Property: WELLS FARGO
Date Acquired: Various — How Acquired: Purchased
Date Sold: Various — Name of Buyer:
Sales Price: 10,640,900. — Cost or other basis (do not reduce by depreciation): 10,598,213.
Sales Expense: — Valuation Method:
Total Gain (Loss): 42,687. — Accumulation Depreciation:

Description of Property:
Date Acquired: — How Acquired:
Date Sold: — Name of Buyer:
Sales Price: — Cost or other basis (do not reduce by depreciation):
Sales Expense: — Valuation Method:
Total Gain (Loss): — Accumulation Depreciation:

Description of Property:
Date Acquired: — How Acquired:
Date Sold: — Name of Buyer:
Sales Price: — Cost or other basis (do not reduce by depreciation):
Sales Expense: — Valuation Method:
Total Gain (Loss): — Accumulation Depreciation:

Description of Property:
Date Acquired: — How Acquired:
Date Sold: — Name of Buyer:
Sales Price: — Cost or other basis (do not reduce by depreciation):
Sales Expense: — Valuation Method:
Total Gain (Loss): — Accumulation Depreciation:

Description of Property:
Date Acquired: — How Acquired:
Date Sold: — Name of Buyer:
Sales Price: — Cost or other basis (do not reduce by depreciation):
Sales Expense: — Valuation Method:
Total Gain (Loss): — Accumulation Depreciation:

Description of Property:
Date Acquired: — How Acquired:
Date Sold: — Name of Buyer:
Sales Price: — Cost or other basis (do not reduce by depreciation):
Sales Expense: — Valuation Method:
Total Gain (Loss): — Accumulation Depreciation:

Description of Property:
Date Acquired: — How Acquired:
Date Sold: — Name of Buyer:
Sales Price: — Cost or other basis (do not reduce by depreciation):
Sales Expense: — Valuation Method:
Total Gain (Loss): — Accumulation Depreciation:

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income
Columns (a) thru (d)

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
WELLS FARGO A/C 8117 LT COVERED	P	Various	Various
WELLS FARGO A/C 8117 LT NONCOVERED	P	Various	Various
15.032 SHARES EXPEDITORS INTL WASH INC	P	06/15/12	10/31/12
2128 SHARES EXPEDITORS INTL WASH INC	P	10/28/11	10/31/12
UBS A/C 097 ST BOX A	P	Various	Various
UBS A/C 097 ST BOX B	P	Various	Various

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income
Columns (e) thru (h)

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
292,072.		295,291.	-3,219.
2,260,673.		2,404,141.	-143,468.
544.		596.	-52.
76,941.		101,212.	-24,271.
31.		106.	-75.
15.		0.	15.
Total		2,801,346.	-171,070.

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income
Columns (i) thru (l)

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (column (h) gain minus column (k), but not less than -0-) **or** losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
			-3,219.
			-143,468.
			-52.
			-24,271.
			-75.
0.	0.	0.	15.
Total	0.	0.	-171,070.

Form 990-PF, Page 11, Part XV, line 3a
Line 3a statement

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Person or Business Checkbox Amount
a Paid during the year				
THE LITERARY ALLIANCE 709 CLAY ST STE 100 FORT WAYNE IN 46802		501(C)3	ACADEMIC SERVICES	Person or [ ] Business [X] 10,000.
TURNSTONE CENTER 3320 NORTH CLINTON ST FORT WAYNE IN 46805		501(C)3	SERVICES FOR PEOPLE WITH PHYSICAL DISABILITIES	Person or [ ] Business [X] 30,000.
AVON FOUNDATION FOR WOMEN P.O. BOX 1073 RYE NY 10580-1073		501(C)3	SUPPORTS RESEARCH BREAST CANCER CURE	Person or [ ] Business [X] 300.
BIG BROTHERS BIG SISTERS 2439 FAIRFIELD AVENUE FORT WAYNE IN 46807		501(C)3	SUPPORTS CHILDREN IN COMMUNITY	Person or [ ] Business [X] 6,500.
FORT WAYNE JEWISH FEDERATION 227 E. WASHINGTON BLVD FORT WAYNE IN 46802		501(C)3	RELIGIOUS	Person or [ ] Business [X] 75,000.
FORT WAYNE SPORTS FOUNDATION P.O. BOX 12445 FORT WAYNE IN 46863		501(C)3	PROVIDES SPORTS ACTIVITIES FOR YOUTH	Person or [ ] Business [X] 5,000.
INDIANA JEWISH HISTORICAL ASSOCIATION 6301 CONSTITUTION DRIVE FORT WAYNE IN 46804		501(C)3	RELIGIOUS EDUCATION	Person or [ ] Business [X] 1,000.
CAMP WATCHA-WANNA-DO P O BOX 11166 FORT WAYNE IN 46856-1166		501(C)3	CAMP FOR CHILDREN UNDERGOING MEDICAL TREATMENT	Person or [ ] Business [X] 1,000.
COMMUNITY HARVEST FOOD BANK P O BOX 10867 FORT WAYNE IN 46855		501(C)3	FOOD FOR UNDERPRIVILEGED	Person or [ ] Business [X] 2,500.
FORT WAYNE MUSEUM OF ART 311 EAST MAIN ST FORT WAYNE IN 46802		501(C)3	ARTS	Person or [ ] Business [X] 5,000.
FORT WAYNE PHILHARMONIC 4901 FULLER DRIVE FORT WAYNE IN 46835-3277		501(C)3	ARTS - MUSIC	Person or [ ] Business [X] 5,000.
INDIANA FIREFIGHTERS ASSOCIATION 9702 E WASHINGTON ST PMB 357 INDIANAPOLIS IN 46229-2609		501(C)3	PROMOTES FIRE SAFETY & PREVENTION	Person or [ ] Business [X] 1,000.
INDIANA FRATERNAL ORDER OF POLICE 1427 E WASHINGTON ST INDIANAPOLIS IN 46201		501(C)3	PROMOTES PUBLIC SAFETY	Person or [ ] Business [X] 1,000.
MLK MONTESSORI SCHOOL 6001 SOUTH ANTHONY BLVD FORT WAYNE IN 46816		501(C)3	EDUCATION	Person or [ ] Business [X] 5,000.
ORLAND VOLUNTEER FIRE DEPARTMENT P.O. BOX 174 ORLAND IN 46776		501(C)3	FIRE & RESCUE SERVICES TO ORLAND COMMUNITY	Person or [ ] Business [X] 1,000.

Form 990-PF, Page 11, Part XV, line 3a Continued

Line 3a statement

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Person or Business Checkbox Amount
a Paid during the year				
QUEEN OF ANGELS ATHLETIC ASSOCIATION 1600 W STATE BLVD FORT WAYNE IN 46808		501(C)3	ATHLETIC OPPORTUNITIES FOR YOUTH	Person or [ ] Business [X] 100.
SCAN INC 500 W MAIN ST FORT WAYNE IN 46802		501(C)3	ASSISTS CHILDREN & FAMILIES IN CRISIS	Person or [ ] Business [X] 2,000.
ZETA BETA TAU FOUNDATION P O BOX 6069 INDIANAPOLIS IN 46206-6069		501(C)3	EDUCATION-SCHOLARSHIPS & LEADERSHIP PROGRAMS	Person or [ ] Business [X] 500.
BOSTON UNIVERSITY SCHOOL OF MANAGEMENT 595 COMMONWEALTH AVE STE 700 BOSTON MA 02215		501(C)3	EDUCATION	Person or [ ] Business [X] 10,000.
CROSSROAD 2525 LAKE AVENUE FORT WAYNE IN 46805-5457		501(C)3	COUNSELING & TREATMENT FOR CHILDREN	Person or [ ] Business [X] 1,000.
BOYS & GIRLS CLUB 2609 FAIRFIELD AVE FORT WAYNE IN 46807		501(C)3	SERVICES TO YOUTH	Person or [ ] Business [X] 11,000.
BELIEVE IN TOMORROW CHILDREN'S FOUNDATION 6601 FREDERICK ROAD BALTIMORE MD 21228		501(C)3	PEDIATRIC SUPPORT PRGRAMS	Person or [ ] Business [X] 2,500.
BISHOP LUERS HIGH SCHOOL 333 E. PAULDING RD. FORT WAYNE IN 46816		501(C)3	HIGH SCHOOL ATHLETICS PROGRAM	Person or [ ] Business [X] 500.
CANTERBURY SCHOOL 3210 SMITH ROAD FORT WAYNE IN 46804		501(C)3	EDUCATION	Person or [ ] Business [X] 1,000.
CASTLE FOR ABUSED KIDS 3525 W. MIDWAY ROAD FORT PIERCE FL 34981		501(C)3	ABUSED CHILDREN AND FAMILIES	Person or [ ] Business [X] 2,000.
CENTER FOR FAMILY SERVICES 4101 PARKER AVE WEST PALM BEACH FL 33405		501(C)3	SOCIAL SERVICES TO FAMILIES AND CHILDREN IN CRISIS	Person or [ ] Business [X] 2,500.
CLEVELAND CLINIC FLORIDA 525 OKEECHOBEE BLVD STE 1400 WEST PALM BEACH FL 33401		501(C)3	MEDICAL RESEARCH	Person or [ ] Business [X] 5,000.
FORT WAYNE CHILDREN'S ZOO 3411 SHERMAN BLVD. FORT WAYNE IN 46808		501(C)3	AUSTRALIAN ADVENTURE CAMPAIGN	Person or [ ] Business [X] 25,000.
HELPING HANDS MINISTRIES 135 MAIN ST. TALLULAH FALLS GA 30573		501(C)3	MEDICAL PROJECTS	Person or [ ] Business [X] 1,000.
HISTORIC FORT WAYNE P.O. BOX 12650 FORT WAYNE IN 46864		501(C)3	INSTALLATION OF AUDIO SYSTEM AT OLD FORT	Person or [ ] Business [X] 3,000.

Form 990-PF, Page 11, Part XV, line 3a Continued

Line 3a statement

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Person or Business Checkbox Amount
a *Paid during the year*				
HISTORY CENTER 302 E. BERRY STREET FORT WAYNE IN 46897-2021		501(C)3	LOCAL HISTORY LEARNING OPPPORTUNITIES FOR YOUTH	Person or [ ] Business [X] 2,500.
DANIEL M MILLS MEMORIAL FUND C/O PNC BANK FORT WAYNE IN 46802		MEMORIAL	MEMORIAL FUND FOR CHILDREN	Person or [X] Business [ ] 250.
PROJECT LINUS 1711 GREYTHORN DR FORT WAYNE IN 46815		501(C)3	PROVIDES BLANKETS FOR CHILDREN IN COMMUNITY	Person or [ ] Business [X] 1,000.
PALM BEACH COUNTY GOLF ASSOCIATION P.O. BOX 32123 PALM BEACH GARDENS FL 33420		501(C)3	PROTECT AND PROMOTE GOLF IN COMMUNITY	Person or [ ] Business [X] 500.
SYRACUSE UNIVERSITY 820 COMSTOCK AVE. SYRACUSE NY 13244-5040		501(C)3	ARTS & SCIENCES DEAN'S EDUCATIONAL ENRICHMENT FUND	Person or [ ] Business [X] 250.
TRINE UNIVERSITY 1 UNIVERSITY AVENUE ANGOLA IN 46703		501(C)3	STUDENT SCHOLARSHIP FUND	Person or [ ] Business [X] 5,000.
UNIVERSITY OF ST. FRANCIS 2701 SPRING STREET FORT WAYNE IN 46808		501(C)3	STUDENT ATHLETICS	Person or [ ] Business [X] 1,000.
VASCULAR CURES 555 PRICE AVE. STE 180 REDWOOD CITY CA 94063		501(C)3	NEW TREATMENTS FOR VASCULAR DISEASE	Person or [ ] Business [X] 2,250.
VIKING PRIDE FOUNDATION P.O. BOX 520037 WINTHROP MA 02152		501(C)3	BENEFIT TO RAISE FUNDS FOR NEWTOWN SCHOOLS	Person or [ ] Business [X] 1,000.
WATERLOO PUBLIC LIBRARY P.O. BOX 707 WATERLOO IN 46793		501(C)3	LIBRARY RENOVATION AND EXPANSION PROJECT	Person or [ ] Business [X] 5,000.
INDIANA UNIVERSITY VARSITY CLUB 1001 E. 17TH STREET BLOOMINGTON IN 47408-1590		501(C)3	ATHLETIC PROGRAM	Person or [ ] Business [X] 6,000.
Total				241,150.

Form 990-PF, Page 1, Part I

Line 16c - Other Professional Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
UBS	INVESTMENT FUND MGR FE	52,025.	52,025.		

Form 990-PF, Page 1, Part I Continued
Line 16c - Other Professional Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Total		52,025.	52,025.		

Form 990-PF, Page 2, Part II, Line 13
L-13 Stmt

Line 13 - Investments - Other:	End of Year Book Value	Fair Market Value
UBS ACCT 092	0.	0.
WELLS FARGO A/C 8117	7,655,563.	7,656,430.
WELLS FARGO A/C 2815	765,885.	765,172.
Total	8,421,448.	8,421,602.

2012 SUMMARY AMENDMENT

WELLS FARGO ADVISORS

Account Number: ‑8117
Command Account Number:
RIFKIN FAMILY FOUNDATION
PIM

Realized Gain/Loss

This information is provided for courtesy purposes only. Each individual taxpayer should consult with a Tax Advisor as to any additional reporting requirements or adjustments. THIS INFORMATION IS NOT VERIFIED OR GUARANTEED BY FIRST CLEARING, LLC TO BE ACCURATE FOR EACH TAXPAYER'S UNIQUE REPORTING REQUIREMENTS. THEREFORE, YOU SHOULD NEVER ASSUME THIS STATEMENT IS ACCURATE IN LIEU OF COMPLETING YOUR TAX RETURN AND CONSULTING WITH YOUR TAX ADVISOR.

Federal tax reporting requirements will create differences between the information presented here and what appears on your Form 1099-B, including but not limited to the following situations:

* Cost basis for many fixed income tax lots has been amortized (for securities purchased at a premium) or accreted (for securities purchased at a discount), when possible, for applicable securities. For securities that were purchased at an Original Issue Discount (OID), only those positions whose cost basis has been adjusted will reflect the impacts of the OID accruals on the original cost basis. The original issue discount amount reported on your Form 1099-OID is not adjusted for market discount, acquisition premium or bond premium. Therefore, the amortization and accretion adjustments used on this statement may not be consistent with the Form 1099-OID amount because the reporting requirements on the Form 1099-OID are different.
* The Original Price represents the unadjusted price of the security. The Original Price can be used to calculate the original unadjusted cost of the security.
* Long-term capital gains reported by a RIC or REIT appear on Form 1099-DIV only, as noted in the instructions for that form.
* Lots closed due to transfers or journals will not be reflected in the Realized Gain/Loss Statement, or on the Form 1099-B.

REALIZED GAIN/LOSS SUMMARY	COVERED SECURITIES	NONCOVERED SECURITIES	TOTAL
Short term	**$219,172.60**	**-$5,475.12**	**$213,697.48**
Long term	**-$3,218.72**	**-$143,468.61**	**-$146,687.33**
Unknown term	**Not applicable**	**$0.00**	**$0.00**
Index options	**Not applicable**	**$0.00**	**$0.00**
Total - Realized Gain/Loss	**$215,953.88**	**-$148,943.73**	**$67,010.15**

Realized Gain/Loss Detail

SHORT TERM GAINS OR LOSSES FOR COVERED SECURITIES

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
AFLAC INC CUSIP 001055102	147.00000	37.2900	10/07/11	06/26/12	5,939.26	5,482.06	457.20
AIM GROWTH SER INVESCO CONV SECS FD CLASS Y CUSIP 00888W700	86.36000	19.3200	06/15/12	06/27/12	1,688.35	1,668.48	19.87

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Account Number: -8117
Command Account Number.
RIFKIN FAMILY FOUNDATION
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Realized Gain/Loss

SHORT TERM GAINS OR LOSSES FOR COVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
ALPINE INC TRUST TAX OPTIMIZED INCOME FD INVESTOR CL CUSIP 020828208	34,293.48400	10.0400	01/31/12	12/24/12	344,306.57	344,649.51	-342.94
	13,869.77900	10.0500	01/31/12	12/24/12	139,252.58	139,391.28	-138.70
	11,271.50400	10 0500	01/31/12	12/24/12	113,165.90	113,278.62	-112.72
	10,649.34300	10.0500	01/31/12	12/24/12	106,919.41	107,025.90	-106.49
Subtotal	**70,084.11000**				**703,644.46**	**704,345.31**	**-700.85**
ANNALY CAPITAL MANAGEMNT INC REIT CUSIP 035710409	9,879.00000	18.0400	07/12/11	06/26/12	169,323.26	178,314.96	-8,991.70
BRITISH AMERN TOB PLC SPON ADR CUSIP 110448107	210.00000	84.0300	08/08/11	06/26/12	21,003.73	17,646.36	3,357.37
	26.00000	89.8500	08/15/11	06/26/12	2,600.46	2,336.20	264.26
	35.00000	84 4700	09/26/11	06/26/12	3,500.63	2,956.55	544.08
Subtotal	**271.00000**				**27,104.82**	**22,939.11**	**4,165.71**
COLUMBIA FUNDS TR SHORT TERM MUNI BD FUND CLASS Z CUSIP 19765J327	32,668.20100	10.5400	01/31/12	12/24/12	343,996.15	344,649.52	-653.37
	13,212.44400	10.5400	01/31/12	12/24/12	139,127.03	139,391.28	-264.25
	10,737.31000	10.5400	01/31/12	12/24/12	113,063.87	113,278.62	-214.75
	10,144.63500	10.5500	01/31/12	12/24/12	106,823.02	107,025.90	-202.88
	13.14000	10.5500	05/01/12	12/24/12	138.36	138.63	-0.27
	82.23800	10.5500	06/01/12	12/24/12	865.96	867.61	-1.65
	75.03700	10.5400	07/02/12	12/24/12	790 14	790.89	-0.75
	76.05600	10.5600	08/01/12	12/24/12	800.87	803.15	-2.28

2012 SUMMARY AMENDMENT

WELLS FARGO ADVISORS

Account Number: -8117
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Realized Gain/Loss

SHORT TERM GAINS OR LOSSES FOR COVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
	75.60300	10.5600	09/04/12	12/24/12	796.10	798.37	-2.27
	70.93800	10.5600	10/01/12	12/24/12	746.98	749.11	-2.13
	76.41800	10.5500	11/01/12	12/24/12	804.68	806.21	-1.53
	69.05900	10.5600	12/03/12	12/24/12	727.20	729.26	-2.06
Subtotal	**67,301.07900**				**708,680.36**	**710,028.55**	**-1,348.19**
CONSOLIDATED EDISON INC CUSIP 209115104	330.00000	50.9800	08/08/11	06/26/12	20,271.31	16,826.21	3,445.10
	55.00000	53.6600	08/15/11	06/26/12	3,378.56	2,951.50	427.06
Subtotal	**385.00000**				**23,649.87**	**19,777.71**	**3,872.16**
DARDEN RESTAURANTS CUSIP 237194105	245.00000	48.9400	08/03/11	06/26/12	12,286.04	11,991.28	294.76
	72.00000	43.8900	10/07/11	06/26/12	3,610.60	3,160.77	449.83
	510.00000	45.8900	08/08/11	06/26/12	25,575.04	23,403.90	2,171.14
	46.00000	49.1900	08/15/11	06/26/12	2,306.77	2,262.74	44.03
	57.00000	47.1800	09/26/11	06/26/12	2,858.39	2,689.53	168.86
Subtotal	**930.00000**				**46,636.84**	**43,508.22**	**3,128.62**
DREYFUS PREMIER SHORT-INTERMEDIATE MUN BD FD CL I CUSIP 261918502	25,932.99600	13.2900	01/31/12	12/24/12	342,315.54	344,649.52	-2,333.98
	10,488.43300	13.2800	01/31/12	12/24/12	138,447.31	139,391.27	-943.96
	8,523.59800	13.2900	01/31/12	12/24/12	112,511.50	113,278.62	-767.12
	8,053.11500	13.2900	01/31/12	12/24/12	106,301.12	107,025.90	-724.78
	7.74800	13.2900	05/01/12	12/24/12	102.27	102.97	-0.70
	57.82100	13.3100	06/01/12	12/24/12	763.23	769.60	-6.37
	58.05100	13.3000	07/02/12	12/24/12	766.27	772.08	-5.81

2012 SUMMARY AMENDMENT

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Command Account Number:
RIFKIN FAMILY FOUNDATION
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Realized Gain/Loss

SHORT TERM GAINS OR LOSSES FOR COVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
	64.61100	13.3200	08/01/12	12/24/12	852.86	860.62	-7.76
	59.98000	13.3200	09/04/12	12/24/12	791.73	798.93	-7.20
	53.08400	13.3200	10/01/12	12/24/12	700.71	707.08	-6.37
	66.95400	13.3100	11/02/12	12/24/12	883.79	891.16	-7.37
	56.42400	13.3100	12/03/12	12/24/12	744.80	751.00	-6.20
	268.32600	13.2200	12/14/12	12/24/12	3,541.93	3,547.27	-5.34
	8.48600	13.2200	12/14/12	12/24/12	112.02	112.19	-0.17
Subtotal	**53,699.62700**				**708,835.08**	**713,658.21**	**-4,823.13**
DU PONT E I DE NEMOURS AND COMPANY CUSIP 263534109	410.00000	44.6200	08/08/11	06/26/12	20,073.15	18,297.07	1,776.08
	49.00000	47.8200	08/15/11	06/26/12	2,398.98	2,343.29	55.69
	146.00000	41.0500	09/26/11	06/26/12	7,148.01	5,994.64	1,153.37
Subtotal	**605.00000**				**29,620.14**	**26,635.00**	**2,985.14**
ECLIPSE FDS INC MAINSTAY HIGH YIELD OPPORTUNITIES FD CL I CUSIP 27885C429	38.54900	11.2700	06/01/12	06/27/12	440.23	434.36	5.87
EMERSON ELECTRIC CO CUSIP 291011104	95.00000	44.1200	10/07/11	06/26/12	4,198 16	4,191.43	6.73
EXPRESS SCRIPTS HLDG CO CUSIP 30219G108	72.09000	56 2000	10/07/11	06/26/12	3,763 74	4,051.81	-288.07
GABELLI ABC FUND ADVISOR CLASS CUSIP 36239V207	10,889.54000	9.8300	01/31/12	06/27/12	107,153.07	107,044.18	108.89
	8,101.59100	9.8300	01/31/12	06/27/12	79,719.66	79,638.64	81.02
Subtotal	**18,991.13100**				**186,872.73**	**186,682.82**	**189.91**

WELLS FARGO ADVISORS

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Realized Gain/Loss

SHORT TERM GAINS OR LOSSES FOR COVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
ILLINOIS TOOL WORKS INC CUSIP 452308109	126.00000	43.0300	10/07/11	06/26/12	6,560.68	5,422.94	1,137.74
ISHARE TR -S&P SMALLCAP 600 INDEX FD CUSIP 464287804	1,353.00000	70.3671	06/26/12	08/14/12	100,586.54	95,206.74	5,379.80
ISHARES BARCLAYS ETF INTERMEDIATE CREDIT BOND FUND CUSIP 464288638	2,142.00000	108.9832	06/26/12	12/24/12	238,021.21	233,442.19	4,579.02
	611.00000	108.9832	06/26/12	12/24/12	67,893.22	66,588.78	1,304.44
	1,361.00000	110.2973	08/14/12	12/24/12	151,231.89	150,114.63	1,117.26
Subtotal	**4,114.00000**				**457,146.32**	**450,145.60**	**7,000.72**
ISHARES CORE S&P ETF SMALLCAP CUSIP 464287804	2,414.00000	70.3671	06/26/12	12/24/12	187,994.50	169,866.27	18,128.23
ISHARES CORE S&P MIDCAP ETF CUSIP 464287507	1,857.00000	90.5974	06/26/12	12/24/12	188,942.52	168,239.48	20,703.04
ISHARES IBOXX INV ETF GRADE CORP BOND FUND CUSIP 464287242	2,776.00000	117.2660	06/26/12	12/24/12	336,565.52	325,530.42	11,035.10
	1,516.00000	119.3370	08/14/12	12/24/12	183,801.63	180,914.89	2,886.74
Subtotal	**4,292.00000**				**520,367.15**	**506,445.31**	**13,921.84**
ISHARES MSCI MALAYSIA INDEX FD WEBS INDEX FD INC CUSIP 464286830	1,699.00000	13.8970	06/26/12	08/14/12	24,848.16	23,611.01	1,237.15
	2,906.00000	13.8970	06/26/12	12/24/12	43,051.14	40,384.68	2,666.46
Subtotal	**4,605.00000**				**67,899.30**	**63,995.69**	**3,903.61**

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Realized Gain/Loss

SHORT TERM GAINS OR LOSSES FOR COVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
ISHARES TR S&P MIDCAP 400 INDEX FD CUSIP 464287507	1,147.00000	90.5974	06/26/12	08/14/12	110,382.98	103,915.29	6,467.69
ISHARES TR -RUSSELL 1000 VALUE INDEX FD CUSIP 464287598	1,849.00000	65.9470	06/26/12	08/14/12	130,485.45	121,936.09	8,549.36
	3,132.00000	65.9470	06/26/12	12/24/12	227,799.35	206,546.15	21,253.20
Subtotal	**4,981.00000**				**358,284.80**	**328,482.24**	**29,802.56**
ISHARES TR RUSSELL 1000 GROWTH INDEX FD CUSIP 464287614	749.00000	61.6490	06/26/12	07/30/12	48,213.44	46,175.16	2,038.28
	2,578.00000	61.6490	06/26/12	08/14/12	168,708.02	158,931.31	9,776.71
	4,959.00000	61.6490	06/26/12	12/24/12	324,659.71	305,717.73	18,941.98
Subtotal	**8,286.00000**				**541,581.17**	**510,824.20**	**30,756.97**
JPMORGAN MORTGAGE BACKED SECURITIES FUND SELECT CLASS CUSIP 4812C1215	69.17600	11.5498	06/01/12	06/27/12	799.68	798.89	0.79
LORD ABBETT INVESTMENT TR FLTG RATE FD CLASS F CUSIP 543916167	39.91200	9.1500	06/01/12	06/27/12	365.60	365.11	0.49
LORD ABBETT INVT TR INFLATION FOCUSED FD CLASS F CUSIP 54400U403	32.93500	14.4100	06/01/12	06/27/12	474.93	474.57	0.36
POWERSHARES EM MAR ETF SOV DE PT CUSIP 73936T573	2,619.00000	28.5047	06/26/12	12/24/12	81,932.27	74,654.05	7,278.22
ROCKWELL COLLINS CUSIP 774341101	52 00000	55.2900	10/07/11	06/26/12	2,444.48	2,875.48	-431.00

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Realized Gain/Loss

SHORT TERM GAINS OR LOSSES FOR COVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
RS INVT TR FLTG RATE CLASS Y CUSIP 74972H283	34.80600	10.0200	06/01/12	06/27/12	349.81	348.76	1.05
SPDR BARCLAYS ETF HIGH YIELD BOND ETF CUSIP 78464A417	2,557.00000	38.9782	06/26/12	12/24/12	104,077.05	99,667.38	4,409.67
SPDR BARCLAYS ETF INTERNATIONAL TREASURY BOND CUSIP 78464A516	1,617.00000	58.5834	06/26/12	12/24/12	99,066.52	94,729.52	4,337.00
STAPLES INC CUSIP 855030102	463 00000	14.1500	10/07/11	06/26/12	5,847.61	6,553.72	-706.11
TCW FDS INC EMERGING MKTS INCOME FD CUSIP 87234N765	182 70600	8 5172	06/01/12	06/27/12	1,591.38	1,556 10	35.28
THORNBURG INVT TRUST LTD TERM MUNICIPAL FUND CLASS I CUSIP 885215434	21,743.78100	14.6200	01/31/12	12/24/12	318,546.39	318,111.51	434.88
	8,505.92400	14.6300	01/31/12	12/24/12	124,611.78	124,441.67	170.11
	6,968.61000	14.6200	01/31/12	12/24/12	102,090.14	101,950.76	139.38
	6,754.49200	14.6300	01/31/12	12/24/12	98,953.31	98,818.22	135.09
	9.99500	14.6100	05/01/12	12/24/12	146.42	146.03	0.39
	77.45900	14.6400	06/01/12	12/24/12	1,134.77	1,134.00	0.77
	86.52800	14.6000	07/02/12	12/24/12	1,267.63	1,263.31	4.32
	83.99500	14.6800	08/01/12	12/24/12	1,230.53	1,233.05	-2.52
	82.64400	14.6600	09/04/12	12/24/12	1,210.73	1,211.56	-0.83
	82.65800	14 7000	10/01/12	12/24/12	1,210.94	1,215.07	-4.13

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Realized Gain/Loss

SHORT TERM GAINS OR LOSSES FOR COVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
	80.78800	14.6900	11/01/12	12/24/12	1,183.55	1,186.77	-3.22
	80.40900	14.7800	12/03/12	12/24/12	1,178.01	1,188.44	-10.43
Subtotal	**44,557.28300**				**652,764.20**	**651,900.39**	**863.81**
VANGUARD MSCI ETF EMERGING MARKETS ETF CUSIP 922042858	1,430.00000	38.3949	06/26/12	08/14/12	59,289.38	54,904.79	4,384.59
	2,834.00000	38.3949	06/26/12	12/24/12	122,596.09	108,811.30	13,784.79
Subtotal	**4,264.00000**				**181,885.47**	**163,716.09**	**18,169.38**
VANGUARD MSCI EAFE ETF CUSIP 921943858	1,043.00000	30.2500	06/26/12	07/30/12	33,254.97	31,550.75	1,704.22
	3,508.00000	30.2500	06/26/12	08/14/12	114,962.30	106,117.00	8,845.30
	6,535.00000	30.2500	06/26/12	12/24/12	228,294.46	197,683.75	30,610.71
Subtotal	**11,086.00000**				**376,511.73**	**335,351.50**	**41,160.23**
VANGUARD MUN BD FD INC SHORT TERM TAX EXEMPT FD SHS ADMIRAL CUSIP 922907803	21,621.67600	15.9400	01/31/12	12/24/12	344,000.86	344,649.52	-648.66
	8,744.74800	15.9300	01/31/12	12/24/12	139,128.94	139,391.28	-262.34
	7,106.56300	15.9300	01/31/12	12/24/12	113,065.42	113,278.61	-213.19
	6,714.29700	15.9300	01/31/12	12/24/12	106,824.46	107,025.89	-201.43
	5.40000	15.9300	05/01/12	12/24/12	85.91	86.02	-0.11
	40.11900	15.9300	06/01/12	12/24/12	638.29	639.09	-0.80
	41.38100	15.9200	07/02/12	12/24/12	658.37	658.79	-0.42
	41.79500	15.9400	08/01/12	12/24/12	664.96	666.21	-1.25
	40.72300	15.9300	09/04/12	12/24/12	647.90	648 71	-0 81
	39 99100	15.9400	10/01/12	12/24/12	636.26	637.45	-1.19

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Realized Gain/Loss

SHORT TERM GAINS OR LOSSES FOR COVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
	38.66600	15.9300	11/01/12	12/24/12	615.18	615.95	-0.77
	2.70300	15.9300	11/08/12	12/24/12	43.00	43.06	-0.06
	40.09000	15.9400	12/03/12	12/24/12	637.85	639.04	-1.19
Subtotal	**44,478.15200**				**707,647.40**	**708,979.62**	**-1,332.22**
VANGUARD REIT ETF CUSIP 922908553	1,170.00000	63.0950	06/26/12	08/14/12	76,884.56	73,821.24	3,063.32
	2,200.00000	62.6828 63.0950	06/26/12	12/24/12	144,343.18	137,902.32 138,809.15	6,440.86
Subtotal	**3,370.00000**				**221,227.74**	**211,723.56 212,630.39**	**9,504.18**
TOTAL SHORT TERM GAINS OR LOSSES FOR COVERED SECURITIES					**$7,597,129.13**	**$7,377,956.53 $7,378,863.36**	**$219,172.60**

SHORT TERM GAINS OR LOSSES FOR NONCOVERED SECURITIES

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
AIM GROWTH SER INVESCO CONV SECS FD CLASS Y CUSIP 00888W700	25.20600	21.1015	07/07/11	06/27/12	492.77	531.81	-39.04
ECLIPSE FDS INC MAINSTAY HIGH YIELD OPPORTUNITIES FD CL I CUSIP 27885C429	115.64000	11.8711	07/12/11	06/27/12	1,320.61	1,373.93	-53.32
GAMCO WESTWOOD FUNDS MIGHTY MITES FUND CLASS I CUSIP 361439680	5,968.38200	18.3819	07/07/11	06/27/12	99,970.40	109,710.37	-9,739.97
	34.89300	15.5423	11/28/11	06/27/12	584.45	542.68	41.77
	136.26500	15.5423	11/28/11	06/27/12	2,282.45	2,119.20	163.25

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Realized Gain/Loss

SHORT TERM GAINS OR LOSSES FOR NONCOVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
Subtotal	**6,139.54000**				**102,837.30**	**112,372.25**	**-9,534.95**
ISHARES DOW JONES OIL EQUIP & SVCS INDEX FD CUSIP 464288844	164.00000	45.7500	10/07/11	06/26/12	7,020.70	7,503.10	-482.40
ISHARES S&P GLOBAL INDUSTRIALS INDEX FUND CUSIP 464288729	164.00000	44.8200	10/07/11	06/26/12	7,819.36	7,350.48	468.88
IVY SCIENCE AND TECHNOLOGY FUN CL I CUSIP 466001807	3,360.84400	31.0233	10/07/11	06/27/12	114,302.30	104,300.41	10,001.89
JPMORGAN MORTGAGE BACKED SECURITIES FUND SELECT CLASS CUSIP 4812C1215	27.44200	11.3931	07/12/11	06/27/12	317.23	312.65	4.58
LORD ABBETT INVESTMENT TR FLTG RATE FD CLASS F CUSIP 543916167	56.83300	9.2998	07/12/11	06/27/12	520.59	528.54	-7.95
POWERSHARES DB ETF COMMODITY INDEX TRACKING FUND CUSIP 73935S105	2,575.00000	24.8299	06/26/12	12/24/12	70,656.41	63,936.99p	6,719.42
	635.00000	27.8497	08/14/12	12/24/12	17,424.02	17,684.56p	-260.54
Subtotal	**3,210.00000**				**88,080.43**	**81,621.55**	**6,458.88**
ROYCE FUND GLOBAL VALUE FD INVT CL CUSIP 780811824	5,006.24400	11.9818	10/07/11	06/27/12	57,221.38	59,983.73	-2,762.35
RS INVT TR FLTG RATE CLASS Y CUSIP 74972H283	76.30800	10.2600	07/12/11	06/27/12	766.89	783.68	-16.79

WELLS FARGO ADVISORS

2012 SUMMARY AMENDMENT

Account Number: : 8117
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RIFKIN FAMILY FOUNDATION
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Realized Gain/Loss

SHORT TERM GAINS OR LOSSES FOR NONCOVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
TCW FDS INC EMERGING MKTS INCOME FD CUSIP 87234N765	190.91000	8.8604	07/12/11	06/27/12	1,662.82	1,691.54	-28.72
TRANSALTA CORP CUSIP 89346D107	1,900.00000	21.4000	09/26/11	06/26/12	31,178.55	40,662.38	-9,483.83
TOTAL SHORT TERM GAINS OR LOSSES FOR NONCOVERED SECURITIES					**$413.540.93**	**$419,016.05**	**-$5,475.12**

LONG TERM GAINS OR LOSSES FOR COVERED SECURITIES

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
AFLAC INC CUSIP 001055102	377.00000	50.7700	03/18/11	06/26/12	15,231.97	19,143.68	-3,911.71
APPLE INC CUSIP 037833100	60.00000	55.0100	01/27/11	06/26/12	34,271.83	3,300.82	30,971.01
	16.00000	52.6000	06/03/11	06/26/12	9,139.16	841.62	8,297.54
Subtotal	**76.00000**				**43,410.99**	**4,142.44**	**39,268.55**
BRITISH AMERN TOB PLC SPON ADR CUSIP 110448107	203.00000	73.9500	01/31/11	06/26/12	20,303.60	15,012.68	5,290.92
BROCADE COMMUNICATIONS SYSTEMS CUSIP 111621306	6.23320	55.0100	01/27/11	06/26/12	29.85	342.91	-313.06
	1.76680	52.6000	06/03/11	06/26/12	8.47	92.94	-84.47
Subtotal	**8.00000**				**38.32**	**435.85**	**-397.53**
CIENA CORP CUSIP 171779309	3.85720	55.0100	01/27/11	06/26/12	59.90	212.20	-152.30
	1.14280	52.5900	06/03/11	06/26/12	17.75	60.11	-42.36
Subtotal	**5.00000**				**77.65**	**272.31**	**-194.66**

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Realized Gain/Loss

LONG TERM GAINS OR LOSSES FOR COVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
CISCO SYSTEMS INC CUSIP 17275R102	390.00000	55.0100	01/27/11	06/26/12	6,599.19	21,455.32	-14,856.13
	104.00000	52.6000	06/03/11	06/26/12	1,759.79	5,470.51	-3,710.72
Subtotal	**494.00000**				**8,358.98**	**26,925.83**	**-18,566.85**
CONSOLIDATED EDISON INC CUSIP 209115104	328.00000	49 9600	01/31/11	06/26/12	20,148.45	16,389.94	3,758.51
DARDEN RESTAURANTS CUSIP 237194105	203.00000	46.7400	01/31/11	06/26/12	10,179.86	9,489.60	690.26
	203.00000	46.3000	03/18/11	06/26/12	10,179.86	9,400.59	779.27
Subtotal	**406.00000**				**20,359.72**	**18,890.19**	**1,469.53**
DELL INC CUSIP 24702R101	285.00000	55.0100	01/27/11	06/26/12	3,420.40	15,678.89	-12,258.49
	76.00000	52.6000	06/03/11	06/26/12	912.11	3,997.68	-3,085.57
Subtotal	**361.00000**				**4,332.51**	**19,676.57**	**-15,344.06**
DU PONT E.I DE NEMOURS AND COMPANY CUSIP 263534109	365.00000	50.7100	01/31/11	06/26/12	17,870.00	18,509 46	-639.46
E M C CORP MASS CUSIP 268648102	240.00000	55.0100	01/27/11	06/26/12	5,771.87	13,203.28	-7,431.41
	64.00000	52.6000	06/03/11	06/26/12	1,539.17	3,366.46	-1,827.29
Subtotal	**304.00000**				**7,311.04**	**16,569.74**	**-9,258.70**
EMERSON ELECTRIC CO CUSIP 291011104	381.00000	53.5600	05/16/11	06/26/12	16,836.83	20,408.47	-3,571.64
EXPRESS SCRIPTS HLDG CO CUSIP 30219G108	254.91000	56.2000	05/16/11	06/26/12	13,308.55	14,327.22	-1,018.67
EXTREME NETWORKS CUSIP 30226D106	30.00000	55.0100	01/27/11	06/26/12	103.80	1,650.41	-1,546.61
	8.00000	52.6000	06/03/11	06/26/12	27.68	420.81	-393.13

2012 SUMMARY AMENDMENT

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RIFKIN FAMILY FOUNDATION
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Realized Gain/Loss

LONG TERM GAINS OR LOSSES FOR COVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
Subtotal	**38.00000**				**131.48**	**2,071.22**	**-1,939.74**
HEWLETT-PACKARD COMPANY							
CUSIP 428236103	333.11000	55.0100	01/27/11	06/26/12	6,485.82	18,325.59	-11,839.77
	88.89000	52.6000	06/03/11	06/26/12	1,730.74	4,675.71	-2,944.97
Subtotal	**422.00000**				**8,216.56**	**23,001.30**	**-14,784.74**
ILLINOIS TOOL WORKS INC							
CUSIP 452308109	176.00000	54.2600	01/31/11	06/26/12	9,164.11	9,550.39	-386.28
	175.00000	54.0600	03/18/11	06/26/12	9,112.04	9,462.04	-350.00
Subtotal	**351.00000**				**18,276.15**	**19,012.43**	**-736.28**
INTERNATIONAL BUSINESS MACHINE CORP							
CUSIP 459200101	195.00000	55.0100	01/27/11	06/26/12	37,577.60	10,727.66	26,849.94
	52.00000	52.6000	06/03/11	06/26/12	10,020.70	2,735.25	7,285.45
Subtotal	**247.00000**				**47,598.30**	**13,462.91**	**34,135.39**
JUNIPER NETWORK INC							
CUSIP 48203R104	30.00000	55.0100	01/27/11	06/26/12	464.39	1,650.41	-1,186.02
	8.00000	52.6000	06/03/11	06/26/12	123.84	420.81	-296.97
Subtotal	**38.00000**				**588.23**	**2,071.22**	**-1,482.99**
NETAPP INC							
CUSIP 64110D104	30.00000	55.0100	01/27/11	06/26/12	891.57	1,650.41	-758.84
	8.00000	52.6000	06/03/11	06/26/12	237.76	420.81	-183.05
Subtotal	**38.00000**				**1,129.33**	**2,071.22**	**-941.89**
ROCKWELL COLLINS							
CUSIP 774341101	310.00000	62.5200	03/18/11	06/26/12	14,572.80	19,381.44	-4,808.64
	17.00000	62.2300	05/16/11	06/26/12	799.15	1,057.98	-258.83
Subtotal	**327.00000**				**15,371.95**	**20,439.42**	**-5,067.47**

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Realized Gain/Loss

LONG TERM GAINS OR LOSSES FOR COVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
STAPLES INC CUSIP 855030102	426.00000	22.3300	01/31/11	06/26/12	5,380.30	9,516.19	-4,135.89
	550.00000	19.8100	03/18/11	06/26/12	6,946.40	10,899.63	-3,953.23
	42.00000	20.0500	05/16/11	06/26/12	530.45	842.44	-311.99
Subtotal	**1,018.00000**				**12,857.15**	**21,258.26**	**-8,401.11**
SYMANTEC CORP CUSIP 871503108	14.98440	55.0100	01/27/11	06/26/12	211.12	824.34	-613.22
	4.01560	52.6000	06/03/11	06/26/12	56.58	211.23	-154.65
Subtotal	**19.00000**				**267.70**	**1,035.57**	**-767.87**
UNISYS CORP CUSIP 909214306	2.20000	55.0100	01/27/11	06/26/12	34.36	121.03	-86.67
	0.80000	52.6000	06/03/11	06/26/12	12.50	42.08	-29.58
Subtotal	**3.00000**				**46.86**	**163.11**	**-116.25**
TOTAL LONG TERM GAINS OR LOSSES FOR COVERED SECURITIES					**$292,072.32**	**$295,291.04**	**-$3,218.72**

LONG TERM GAINS OR LOSSES FOR NONCOVERED SECURITIES

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
AIM GROWTH SER INVESCO CONV SECS FD CLASS Y CUSIP 00888W700	7,889.18600	21.1716	05/04/11	06/27/12	154,233.58	167,105.62	-12,872.04
	5,212.88300	21.0314	05/17/11	06/27/12	101,911.86	109,686.33	-7,774.47
Subtotal	**13,102.06900**				**256,145.44**	**276,791.95**	**-20,646.51**
ECLIPSE FDS INC MAINSTAY HIGH YIELD OPPORTUNITIES FD CL I CUSIP 27885C429	7,347.11700	12.1516	05/16/11	06/27/12	83,904.07	89,352.51	-5,448.44

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Realized Gain/Loss

LONG TERM GAINS OR LOSSES FOR NONCOVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
GAMCO WESTWOOD FUNDS MIGHTY MITES FUND CLASS I CUSIP 361439680	1,531.86800	17.6139	01/27/11	06/27/12	25,658.78	26,997.66	-1,338.88
ISHARES DOW JONES OIL EQUIP & SVCS INDEX FD CUSIP 464288844	888.00000	54.3500	01/07/11	06/26/12	38,014.42	48,268.21	-10,253.79
	11.00000	63.0800	06/03/11	06/26/12	470.89	693.88	-222.99
Subtotal	**899.00000**				**38,485.31**	**48,962.09**	**-10,476.78**
ISHARES S&P GLOBAL INDUSTRIALS INDEX FUND CUSIP 464288729	802.00000	56 7000	01/27/11	06/26/12	38,238.54	45,474.45	-7,235.91
	196.00000	56.4500	06/03/11	06/26/12	9,345.08	11,066.12	-1,721.04
Subtotal	**998.00000**				**47,583.62**	**56,540.57**	**-8,956.95**
JPMORGAN MORTGAGE BACKED SECURITIES FUND SELECT CLASS CUSIP 4812C1215	28,093.29900	11.3637	06/03/11	06/27/12	324,758.53	319,518 18	5,240.35
LORD ABBETT INVESTMENT TR FLTG RATE FD CLASS F CUSIP 543916167	3,513.12700	9.4097	01/27/11	06/27/12	32,180.24	33,092.49	-912.25
	32.06400	9.3997	02/28/11	06/27/12	293.70	301.71	-8.01
	33.13500	9.3797	03/31/11	06/27/12	303.51	310.80	-7.29
	28.90100	9.3997	04/29/11	06/27/12	264.73	271.67	-6.94
	5,885.90800	9.3797	05/16/11	06/27/12	53,914.93	55,266.91	-1,351.98
Subtotal	**9,493.13500**				**86,957.11**	**89,243.58**	**-2,286.47**

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Realized Gain/Loss

LONG TERM GAINS OR LOSSES FOR NONCOVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
LORD ABBETT INVT TR INFLATION FOCUSED FD CLASS F CUSIP 54400U403	11,859.81700	14.8903	05/16/11	06/27/12	171,018 55	176,715.50	-5,696.95
MILLER INVT TRUST MILLER CONVERTIBLE FD CLASS I CUSIP 60055P201	34,075.78400	12.0033	05/04/11	06/27/12	358,477.25	409,020.54	-50,543.29
	10,860.70800	11.9331	05/17/11	06/27/12	114,254.65	129,709.96	-15,455.31
Subtotal	**44,936.49200**				**472,731.90**	**538,730.50**	**-65,998.60**
PERMANENT PORTFOLIO FD PERM PORTFOLIO PORTFOLIO CUSIP 714199106	1,039.84900	45.2600	01/27/11	06/27/12	48,124.21	47,073.96	1,050.25
	4,557.44800	48.5200	05/04/11	06/27/12	210,918.69	221,172.95	-10,254.26
	50.20800	47.5900	05/17/11	06/27/12	2,323.63	2,389.90	-66.27
Subtotal	**5,647.50500**				**261,366.53**	**270,636.81**	**-9,270.28**
ROYCE FUND GLOBAL VALUE FD INVT CL CUSIP 780811824	3,163.71100	14.3083	01/07/11	06/27/12	36,161.21	45,298.81	-9,137.60
	492.30300	15.4066	06/03/11	06/27/12	5,627.02	7,584.73	-1,957.71
Subtotal	**3,656.01400**				**41,788.23**	**52,883.54**	**-11,095.31**
RS INVT TR FLTG RATE CLASS Y CUSIP 74972H283	3,115.63400	10.3600	01/12/11	06/27/12	31,312.12	32,277.97	-965.85
	74.36400	10.3800	01/27/11	06/27/12	747.35	771.90	-24.55
	5,373.14700	10.3900	05/16/11	06/27/12	54,000.13	55,827.00	-1,826.87
Subtotal	**8,563.14500**				**86,059.60**	**88,876.87**	**-2,817.27**

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Realized Gain/Loss

LONG TERM GAINS OR LOSSES FOR NONCOVERED SECURITIES *Continued*

Description	Share Quantity	Adjusted Price/ Original Price	Open Date/ Acquisition Date	Date of Sale or Exchange	Proceeds	Adjusted Cost/ Original Cost	Gain or Loss Amount
SYCAMORE NETWORKS INC CUSIP 871206405	3.00000	56.2610	01/27/11	06/26/12	42.09	168.78	-126.69
TCW FDS INC EMERGING MKTS INCOME FD CUSIP 87234N765	8,700.87600	8.7356	01/12/11	06/27/12	75,784.63	76,007.38	-222.75
	9,005.60200	8.6654	01/27/11	06/27/12	78,438.79	78,107.41	331.38
	20,118.74500	8.8916	05/16/11	06/27/12	175,234.27	179,044.61	-3,810.34
	3,985.67600	8.9228	06/03/11	06/27/12	34,715.24	35,563.36	-848.12
Subtotal	**41,810.89900**				**364,172.93**	**368,722.76**	**-4,549.83**
TOTAL LONG TERM GAINS OR LOSSES FOR NONCOVERED SECURITIES					**$2,260,672.69**	**$2,404,141.30**	**-$143,468.61**

p Cost may be inaccurate due to adjustments reported by the partnerships to you on schedule K-1

Form **8868**
(Rev January 2013)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

► **File a separate application for each return.**

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

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

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

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

A corporation required to file Form 990-T and requesting an automatic 6-month extension – check this box and complete Part I only ► [ ]

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

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions RIFKIN FAMILY FOUNDATION	Employer identification number (EIN) or 31-1192429
File by the due date for filing your return See instructions	Number, street, and room or suite number If a P O box, see instructions 5642 COVENTRY LANE	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions FORT WAYNE IN 46804	

Enter the Return code for the return that this application is for (file a separate application for each return) 04

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

- The books are in the care of ► JENNIFER L. WILSON

  Telephone No ► (260) 432-2233 FAX No. ► (260) 436-3047
- If the organization does not have an office or place of business in the United States, check this box ► [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ____ If this is for the whole group, check this box ► [ ] If it is for part of the group, check this box ► [ ] and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until Aug 15, 20 13, to file the exempt organization return for the organization named above The extension is for the organization's return for.
► [X] calendar year 20 12 or
► [ ] tax year beginning ________, 20 ___, and ending ________, 20 ___

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	3a	$ 3,250.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit .	3b	$
c Balance due. Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	$ 3,250.

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