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Form **990-PF**
Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052
2012
Open to public Inspection

For calendar year 2012 or tax year beginning , and ending

Name of foundation
JOSEPH H. KANTER FAMILY FOUNDATION
C/O THE HEALTH LEGACY PARTNERSHIP

A Employer identification number
31-1595996

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
PO BOX 223220

B Telephone number
954-921-1406

City or town, state, and ZIP code
HOLLYWOOD, FL 33022

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, col (c), line 16) ▶$ 3,950,141.

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))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received	33,000.			
2 Check ▶ ☐ if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	141,640.	141,640.	141,640.	STATEMENT 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	18,025.			STATEMENT 1
b Gross sales price for all assets on line 6a 2,791,670.				
7 Capital gain net income (from Part IV, line 2)		93,694.		
8 Net short-term capital gain			0.	
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income	68,145.	62,208.	68,145.	STATEMENT 3
12 Total. Add lines 1 through 11	260,810.	297,542.	209,785.	
13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees				
b Accounting fees STMT 4	5,000.	0.	0.	5,000.
c Other professional fees				
17 Interest				
18 Taxes STMT 5	3,234.	3,234.	0.	0.
19 Depreciation and depletion	23,135.	0.	18,368.	
20 Occupancy	6,429.	0.	0.	6,429.
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses STMT 6	460,444.	0.	0.	460,444.
24 Total operating and administrative expenses. Add lines 13 through 23	498,242.	3,234.	18,368.	471,873.
25 Contributions, gifts, grants paid	27,850.			27,850.
26 Total expenses and disbursements. Add lines 24 and 25	526,092.	3,234.	18,368.	499,723.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-265,282.			
b Net investment income (if negative, enter -0-)		294,308.		
c Adjusted net income (if negative, enter -0-)			191,417.	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing		2.	2.
	2 Savings and temporary cash investments	87,253.	21,125.	21,125.
	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			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 9	4,168,222.	3,808,103.	3,778,482.
	14 Land, buildings, and equipment: basis ▶ 72,390.			
	Less accumulated depreciation STMT 8 ▶ 23,135.	0.	49,255.	49,255.
	15 Other assets (describe ▶ STATEMENT 10)	7,378.	101,277.	101,277.
	16 **Total assets** (to be completed by all filers)	4,262,853.	3,979,762.	3,950,141.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ LOAN PAYABLE)	176,009.	176,009.	
	23 **Total liabilities** (add lines 17 through 22)	176,009.	176,009.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ [X] and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted	4,086,844.	3,803,753.	
	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**	4,086,844.	3,803,753.	
	31 **Total liabilities and net assets/fund balances**	4,262,853.	3,979,762.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	4,086,844.
2	Enter amount from Part I, line 27a	2	-265,282.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	3,821,562.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 7	5	17,809.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	3,803,753.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	PUBLICLY TRADED SECURITIES	P		
b	PUBLICLY TRADED SECURITIES	P		
c	CAPITAL GAINS DIVIDENDS			
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	1,997,227.		2,045,739.	-48,512.
b	791,794.		652,237.	139,557.
c	2,649.			2,649.
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				-48,512.
b				139,557.
c				2,649.
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	93,694.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	-48,512.

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2011	240,103.	4,047,976.	.059314
2010	249,671.	3,872,182.	.064478
2009	497,084.	3,457,120.	.143786
2008	330,750.	3,253,226.	.101668
2007	88,092.	3,446,971.	.025556

2	**Total** of line 1, column (d)	2	.394802
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	.078960
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	3,924,851.
5	Multiply line 4 by line 3	5	309,906.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,943.
7	Add lines 5 and 6	7	312,849.
8	Enter qualifying distributions from Part XII, line 4	8	499,723.

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)

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% of Part I, line 27b	1	2,943.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0.
3	Add lines 1 and 2	3	2,943.
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	2,943.
6	Credits/Payments:		
a	2012 estimated tax payments and 2011 overpayment credited to 2012 — 6a		
b	Exempt foreign organizations - tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	0.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	52.
9	**Tax due** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	2,995.
10	**Overpayment** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be: **Credited to 2013 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? *If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*	1b		X
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. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		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
4a	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? N/A	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, col (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ DC			
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 STMT 11	10	X	

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ KANTERHEALTH.ORG

14 The books are in care of ▶ JOSEPH H. KANTER Telephone no ▶954-921-1406

Located at ▶PO BOX 223220, HOLLYWOOD, FL ZIP+4 ▶33022

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22 1. If "Yes," enter the name of the foreign country ▶	16		X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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)? N/A	1b		
	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?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? ☐ Yes ☒ No			
	If "Yes," list the years ▶ _____, _____, _____, _____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ _____, _____, _____, _____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ 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.)* N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?	4b		X

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

5a	During the year did the foundation pay or incur any amount to.			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?	☐ Yes ☒ No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	N/A	5b	
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A	☐ Yes ☐ No		
	If "Yes," attach the statement required by Regulations section 53 4945-5(d)			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	X
	If "Yes" to 6b, file Form 8870			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No		
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b	

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOSEPH H. KANTER PO BOX 223220 HOLLYWOOD, FL 33022	PRESIDENT 1.00	0.	0.	0.
NANCY R. KANTER PO BOX 223220 HOLLYWOOD, FL 33022	DIRECTOR 1.00	0.	0.	0.
ARTHUR G. NEWMEYER, III PO BOX 223220 HOLLYWOOD, FL 33022	DIRECTOR 1.00	0.	0.	0.

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

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

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over $50,000 for professional services ▶ 0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 SEE STATEMENT 12	101,359.
2 SEE STATEMENT 13	23,644.
3	
4	

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

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

Form **990-PF** (2012)

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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	3,912,424.
b	Average of monthly cash balances	1b	72,196.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	3,984,620.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	3,984,620.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	59,769.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,924,851.
6	**Minimum investment return** Enter 5% of line 5	6	196,243.

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

1	Minimum investment return from Part X, line 6		1	
2a	Tax on investment income for 2012 from Part VI, line 5	2a		
b	Income tax for 2012. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	
4	Recoveries of amounts treated as qualifying distributions		4	
5	Add lines 3 and 4		5	
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	

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	499,723.
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	499,723.
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	2,943.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	496,780.

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)

N/A

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only				
b Total for prior years: _____, _____, _____				
3 Excess distributions carryover, if any, to 2012.				
a From 2007				
b From 2008				
c From 2009				
d From 2010				
e From 2011				
f **Total** of lines 3a through e				
4 Qualifying distributions for 2012 from Part XII, line 4: ▶ $ _____				
a Applied to 2011, but not more than line 2a				
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				
e Remaining amount distributed out of corpus				
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				
b Prior years' undistributed income. Subtract line 4b from line 2b				
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				
e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr.				
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)				
8 Excess distributions carryover from 2007 not applied on line 5 or line 7				
9 **Excess distributions carryover to 2013** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010				
d Excess from 2011				
e Excess from 2012				

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

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 ▶ 07/07/98

b Check box to indicate whether the foundation is a private operating foundation described in section [X] 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	191,417.	135,615.	154,404.	172,856.	654,292.
b 85% of line 2a	162,704.	115,273.	131,243.	146,928.	556,148.
c Qualifying distributions from Part XII, line 4 for each year listed	499,723.	240,103.	249,671.	506,517.	1,496,014.
d Amounts included in line 2c not used directly for active conduct of exempt activities	0.	0.	0.	0.	0.
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	499,723.	240,103.	249,671.	506,517.	1,496,014.
3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets		4,140,996.	4,038,792.	3,810,767.	11,990,555.
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0.
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed	130,829.	134,933.	129,073.	115,237.	510,072.
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)					0.
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0.
(3) Largest amount of support from an exempt organization					0.
(4) Gross investment income					0.

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).)

JOSEPH H. KANTER

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

NONE

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

Check here ▶ [ ] if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail of the person to whom applications should be addressed:

JOSEPH H. KANTER, 954-921-1406
PO BOX 223220, HOLLYWOOD, FL 33022

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

NO PRESET FORM

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*				
AMERICAN MEDICAL INFORMATICS ASSOCIATION 4720 MONTGOMERY LANE, SUITE 500 BETHESDA, MD 20814	NONE	PUBLIC CHARITY	CHARITY	15,000.
THE COMMUNITY FOUNDATION FOR THE NATIONAL CAPITAL REGION 1201 15TH STREET NW 420 WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	CHARITY	10,000.
ANDREW L. WARSHAW, MD, INSTITUTE FOR PANCREATIC CANCER RESEARCH 55 FRUIT STREET BOSTON, MA 02114	NONE	PUBLIC CHARITY	CHARITY	1,000.
VISTA DEL MAR CHILD AND FAMILY SERVICES 3200 MOTOR AVENUE LOS ANGELES, CA 90034	NONE	PUBLIC CHARITY	CHARITY	1,000.
CUTANEOUS LYMPHOMA FOUNDATION PO BOX 374 BIRMINGHAM, MI 48012	NONE	PUBLIC CHARITY	CHARITY	500.
Total SEE CONTINUATION SHEET(S)			▶ 3a	27,850.
b *Approved for future payment*				
NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income
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	141,640.	
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			14	62,208.	
8 Gain or (loss) from sales of assets other than inventory			18	18,025.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a REFUND OF LEGAL FEES			01	5,937.	
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		227,810.	0.
13 Total. Add line 12, columns (b), (d), and (e)					13 227,810.

(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).

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	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions.			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		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
		N/A	

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

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

▶ J. H. Kanter 11/8/13 ▶ PRESIDENT

Signature of officer or trustee Date Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
		11/8/13		

Firm's name ▶ BLOOM, GETTIS & HABIB, PA — Firm's EIN ▶ 65-0286987

Firm's address ▶ 2601 S BAYSHORE DR NO 1450 MIAMI, FL 33133 — Phone no 305-858-6211

Form **990-PF** (2012)

223622
12-05-12

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
JOSEPH H. KANTER FAMILY FOUNDATION
C/O THE HEALTH LEGACY PARTNERSHIP

Employer identification number
31-1595996

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
JOSEPH H. KANTER FAMILY FOUNDATION
C/O THE HEALTH LEGACY PARTNERSHIP

Employer identification number
31-1595996

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	FONEMED 3 LINCOLN DRIVE, SUITE A VENTURA, CA 93001	$ 10,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
2	UNITED WESTLABS, INC. 801 N. PARKCENTER DR, #202 SANTA ANA, CA 92705	$ 23,000.	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)

Name of organization
JOSEPH H. KANTER FAMILY FOUNDATION
C/O THE HEALTH LEGACY PARTNERSHIP

Employer identification number
31-1595996

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization: JOSEPH H. KANTER FAMILY FOUNDATION C/O THE HEALTH LEGACY PARTNERSHIP

Employer identification number: 31-1595996

Part III *Exclusively* religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **$1,000 or less** for the year. (Enter this information once) ▶ $

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MIAMI JEWISH HEALTH SYSTEMS 5200 NE 2ND AVENUE MIAMI, FL 33137	NONE	PUBLIC CHARITY	CHARITY	100.
THE BRENT SHAPIRO FOUNDATION FOR ALCOHOL AND DRUG AWARENESS 10250 CONSTELLATION BOULEVARD, 18TH FLOOR LOS ANGELES, CA 90067	NONE	PUBLIC CHARITY	CHARITY	250.
Total from continuation sheets				350.

223631
05-01-12

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,997,227.	2,045,739.	0.	0.	-48,512.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
791,794.	727,906.	0.	0.	63,888.

CAPITAL GAINS DIVIDENDS FROM PART IV	2,649.
TOTAL TO FORM 990-PF, PART I, LINE 6A	18,025.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
WELLS FARGO 2844 (DIVIDEND)	142,221.	0.	142,221.
WELLS FARGO 2844 (INTEREST)	38.	0.	38.
WELLS FARGO 7687 (DIVIDEND)	2,028.	0.	2,028.
WELLS FARGO 7687 (INTEREST)	2.	0.	2.
TOTAL TO FM 990-PF, PART I, LN 4	144,289.	0.	144,289.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
NON DIVIDEND DISTRIBUTIONS	62,208.	62,208.	62,208.
REFUND OF LEGAL FEES	5,937.	0.	5,937.
TOTAL TO FORM 990-PF, PART I, LINE 11	68,145.	62,208.	68,145.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	5,000.	0.	0.	5,000.
TO FORM 990-PF, PG 1, LN 16B	5,000.	0.	0.	5,000.

FORM 990-PF TAXES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL INCOME TAXES	2,406.	2,406.	0.	0.
FOREIGN TAXES	828.	828.	0.	0.
TO FORM 990-PF, PG 1, LN 18	3,234.	3,234.	0.	0.

FORM 990-PF OTHER EXPENSES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LICENSES & FEES	366.	0.	0.	366.
OFFICE EXPENSE	6,244.	0.	0.	6,244.
DUES & SUBSCRIPTIONS	2,438.	0.	0.	2,438.
CONTRACTED SERVICES	75,030.	0.	0.	75,030.
BANK CHARGES & FEES	20,679.	0.	0.	20,679.

WEB SERVICE	3,840.	0.	0.	3,840.
TELEPHONE	3,145.	0.	0.	3,145.
POSTAGE	1,695.	0.	0.	1,695.
PRINTING	755.	0.	0.	755.
MEALS	3,347.	0.	0.	3,347.
LHS CONFERENCE	101,359.	0.	0.	101,359.
ADVERTISING	2,039.	0.	0.	2,039.
COMPUTER SERVICE AND SUPPLIES	537.	0.	0.	537.
GRANT APPLICATION	17,800.	0.	0.	17,800.
TRAVEL	12,241.	0.	0.	12,241.
INSURANCE	9,420.	0.	0.	9,420.
STAFFING COSTS	199,509.	0.	0.	199,509.
TO FORM 990-PF, PG 1, LN 23	460,444.	0.	0.	460,444.

FORM 990-PF OTHER DECREASES IN NET ASSETS OR FUND BALANCES STATEMENT 7

DESCRIPTION	AMOUNT
BASIS ADJUSTMENT FOR UNREALIZED GAIN ON INVESTMENTS	17,809.
TOTAL TO FORM 990-PF, PART III, LINE 5	17,809.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 8

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE	FAIR MARKET VALUE
COMPUTER EQUIPMENT	824.	494.	330.	330.
COMPUTER EQUIPMENT	913.	548.	365.	365.
COMPUTER EQUIPMENT	3,477.	2,087.	1,390.	1,390.
COMPUTER EQUIPMENT	286.	172.	114.	114.
COMPUTER EQUIPMENT	3,890.	2,334.	1,556.	1,556.
WEBSITE DEVELOPMENT COSTS	63,000.	17,500.	45,500.	45,500.
TO 990-PF, PART II, LN 14	72,390.	23,135.	49,255.	49,255.

FORM 990-PF OTHER INVESTMENTS STATEMENT 9

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
BROKERAGE ACCOUNTS	COST	3,808,103.	3,778,482.
TOTAL TO FORM 990-PF, PART II, LINE 13		3,808,103.	3,778,482.

FORM 990-PF OTHER ASSETS STATEMENT 10

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
SECURITY DEPOSITS	2,378.	2,378.	2,378.
DUE FROM FEDERAL HEALTH BOARD	5,000.	5,000.	5,000.
IPTV PRODUCTION IN PROCESS	0.	70,255.	70,255.
BOOK PUBLICATION IN PROCESS	0.	23,644.	23,644.
TO FORM 990-PF, PART II, LINE 15	7,378.	101,277.	101,277.

FORM 990-PF LIST OF SUBSTANTIAL CONTRIBUTORS STATEMENT 11
PART VII-A, LINE 10

NAME OF CONTRIBUTOR	ADDRESS
JOSEPH H. KANTER	PO BOX 223220 HOLLYWOOD, FL 33022
FONEMED	3 LINCOLN DRIVE, SUITE A VENTURA, CA 93001
UNITED WEST LABS	801 N. PARKCENTER DR, #202 SANTA ANA, CA 92705

FORM 990-PF SUMMARY OF DIRECT CHARITABLE ACTIVITIES STATEMENT 12

ACTIVITY ONE

THE JOSEPH H. KANTER FAMILY FOUNDATION (KFF) CONVENED A TWO-DAY LEARNING HEALTH SYSTEM (LHS) SUMMIT WHERE OVER 80 PROMINENT INDIVIDUALS REPRESENTING ORGANIZATIONS AND STAKEHOLDERS ACROSS THE HEALTH CARE AND HEALTH IT COMMUNITIES GATHERED AT THE NATIONAL PRESS CLUB IN WASHINGTON, D.C. PARTICIPANTS WORKED TOGETHER TO BEGIN LAYING KEY FOUNDATIONAL ELEMENTS THAT PROMISE TO HARMONIZE AND COALESCE CUTTING-EDGE WORK PRESENTLY UNDERWAY INTO A NATIONAL-SCALE LHS.

COST OF PLANNING CONFERENCE 4,785; SUPPLIES AND POSTAGE 1,724; CATERING AND CONFERENCE VENUE RENTAL 46,953; ASSOCIATED TRAVEL AND LODGING 47,897.

	EXPENSES
TO FORM 990-PF, PART IX-A, LINE 1	101,359.

FORM 990-PF SUMMARY OF DIRECT CHARITABLE ACTIVITIES STATEMENT 13

ACTIVITY TWO

PUBLICATION OF BOOK "YOUR LIFE, YOUR HEALTH - SHARE YOUR HEALTH DATA ELECTRONICALLY - IT MAY SAVE YOUR LIFE" AS AN ADVOCACY TOWARD THE MISSION STATEMENT TO CREATE A ØLEARNING HEALTH SYSTEMØ (LHS) WILL ENABLE DATA TO BE RAPIDLY MOBILIZED, CONTINUOUSLY ANALYZEDØAND THE RESULTS SUBSEQUENTLY SHAREDØTO IMPROVE HEALTH CARE QUALITY, EMPOWER PUBLIC HEALTH AND BIOMEDICAL RESEARCH, AND ENABLE CLINICIANS AND PATIENTS TO COLLABORATIVELY MAKE BETTER-INFORMED HEALTH DECISIONS BY HAVING SCIENTIFIC DATA OF WHAT WORKS BEST IN EVERY DISEASE. THE BOOK BUILDS UPON AND IS A NATURAL PROGRESSION FROM THE WORK WE HAVE DONE TOGETHER OVER THE YEARS TO GENERATE SUPPORT FOR THE CONCEPT AND VISION OF A LEARNING HEALTH SYSTEM.

	EXPENSES
TO FORM 990-PF, PART IX-A, LINE 2	23,644.

Depreciation and Amortization Detail FORM 990-PF PAGE 1 990-PF

Asset Number	Description of property	Date placed in service	Method/ IRC sec.	Life or rate	Line No.	Cost or other basis	Basis reduction	Accumulated depreciation/amortization	Current year deduction
1	COMPUTER EQUIPMENT	01/18/12	200DB	5.00	19B	824.	412.		494.
2	COMPUTER EQUIPMENT	03/09/12	200DB	5.00	19B	913.	457.		548.
3	COMPUTER EQUIPMENT	05/18/12	200DB	5.00	19B	3,477.	1,739.		2,087.
4	COMPUTER EQUIPMENT	06/21/12	200DB	5.00	19B	286.	143.		172.
5	COMPUTER EQUIPMENT	10/19/12	200DB	5.00	19B	3,890.	1,945.		2,334.
6	WEBSITE DEVELOPMENT COSTS	03/02/12	SL	3.00	16	63,000.			17,500.
	* TOTAL 990-PF PG 1 DEPR					72,390.	4,696.	0.	23,135.

216261
05-01-12

- Current year section 179 (D) - Asset disposed

Form **4562**

Department of the Treasury
Internal Revenue Service (99)

Depreciation and Amortization 990-PF
(Including Information on Listed Property)

▶ See separate instructions. ▶ Attach to your tax return.

OMB No 1545-0172

2012

Attachment Sequence No 179

Name(s) shown on return

JOSEPH H. KANTER FAMILY FOUNDATION
C/O THE HEALTH LEGACY PARTNERSHIP

Business or activity to which this form relates

FORM 990-PF PAGE 1

Identifying number

31-1595996

Part I **Election To Expense Certain Property Under Section 179 Note.** *If you have any listed property, complete Part V before you complete Part I*

1	Maximum amount (see instructions)	1	500,000.
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation	3	2,000,000.
4	Reduction in limitation Subtract line 3 from line 2 If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1 If zero or less, enter -0- If married filing separately, see instructions	5	

6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost

7	Listed property Enter the amount from line 29	7	
8	Total elected cost of section 179 property Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction Enter the **smaller** of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2011 Form 4562	10	
11	Business income limitation Enter the smaller of business income (not less than zero) or line 5	11	
12	Section 179 expense deduction Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2013 Add lines 9 and 10, less line 12 ▶	13	

Note: *Do not use Part II or Part III below for listed property. Instead, use Part V.*

Part II **Special Depreciation Allowance and Other Depreciation (Do not include listed property.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year	14	4,696.
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	17,500.

Part III **MACRS Depreciation (Do not include listed property.)** (See instructions.)

Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2012	17	
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ▶ ☐		

Section B - Assets Placed in Service During 2012 Tax Year Using the General Depreciation System

	(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a	3-year property						
b	5-year property		4,694.	5 YRS.	HY	200DB	939.
c	7-year property						
d	10-year property						
e	15-year property						
f	20-year property						
g	25-year property			25 yrs		S/L	
h	Residential rental property	/		27 5 yrs	MM	S/L	
		/		27 5 yrs	MM	S/L	
i	Nonresidential real property	/		39 yrs	MM	S/L	
		/			MM	S/L	

Section C - Assets Placed in Service During 2012 Tax Year Using the Alternative Depreciation System

20a	Class life					S/L	
b	12-year			12 yrs		S/L	
c	40-year	/		40 yrs	MM	S/L	

Part IV **Summary** (See instructions)

21	Listed property Enter amount from line 28	21	
22	**Total.** Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21 Enter here and on the appropriate lines of your return Partnerships and S corporations - see instr	22	23,135.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V **Listed Property** (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement)

Note: *For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete* **only** *24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable*

Section A - Depreciation and Other Information (Caution: *See the instructions for limits for passenger automobiles* **)**

24a Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No 24b If "Yes," is the evidence written? ☐ Yes ☐ No

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use						25		
26 Property used more than 50% in a qualified business use								
		%						
		%						
		%						
27 Property used 50% or less in a qualified business use								
		%				S/L -		
		%				S/L -		
		%				S/L -		
28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1						28		
29 Add amounts in column (i), line 26. Enter here and on line 7, page 1							29	

Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person.
If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles

	(a) Vehicle		(b) Vehicle		(c) Vehicle		(d) Vehicle		(e) Vehicle		(f) Vehicle	
30 Total business/investment miles driven during the year (**do not** include commuting miles)												
31 Total commuting miles driven during the year												
32 Total other personal (noncommuting) miles driven												
33 Total miles driven during the year. Add lines 30 through 32												
34 Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
35 Was the vehicle used primarily by a more than 5% owner or related person?												
36 Is another vehicle available for personal use?												

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who **are not** more than 5% owners or related persons

	Yes	No
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use?		

Note: *If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles*

Part VI **Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2012 tax year					
43 Amortization of costs that began before your 2012 tax year				43	
44 **Total.** Add amounts in column (f) See the instructions for where to report				44	

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

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

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

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

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
File by the due date for filing your return See instructions	JOSEPH H. KANTER FAMILY FOUNDATION C/O THE HEALTH LEGACY PARTNERSHIP	31-1595996
	Number, street, and room or suite no If a P O. box, see instructions PO BOX 223220	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions HOLLYWOOD, FL 33022	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

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

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

- The books are in the care of ▶ JOSEPH H. KANTER
  PO BOX 223220 - HOLLYWOOD, FL 33022
  Telephone No ▶ 954-921-1406 FAX No. ▶
- If the organization does not have an office or place of business in the United States, check this box ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ▶ [ ] If it is for part of the group, check this box ▶ [ ] and attach a list with the names and EINs of all members the extension is for

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

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

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

7 State in detail why you need the extension
ADDITIONAL TIME IS NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN

8a	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	8a	$	0.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	$	0.
c	**Balance due.** Subtract line 8b from line 8a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	$	0.

Signature and Verification must be completed for Part II only.

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

Signature ▶ Title ▶ PRESIDENT Date ▶

Form 8868 (Rev 1-2013)

223842
01-21-13

	3,516,601.82 +
	291,500.87 +
Book Part II Line 13	3,808,102.69 *

	3,484,960.05 +
	293,522.14 +
FMV Part II Line 13	3,778,482.19 *

JOSEPH H. KANTER FAMILY FOUNDATION

DECEMBER 1 - DECEMBER 31, 2012
ACCOUNT NUMBER: 6355-2844

Portfolio detail

Cash and Sweep Balances

Bank Deposit Sweep - Consists of monies held at Wells Fargo Bank, N A. and (if amounts exceed $250,000) at one or more other Wells Fargo affiliated banks These assets are not covered by SIPC, but are instead eligible for FDIC insurance of up to $250,000 per depositor, per institution, in accordance with FDIC rules. For additional information on the Bank Deposit Sweep for your account, please contact Your Financial Advisor

DESCRIPTION	% OF ACCOUNT	ANNUAL PERCENTAGE YIELD EARNED*	CURRENT MARKET VALUE	ESTIMATED ANNUAL INCOME
Cash	0 04	0 00	1,449 40	0.00
BANK DEPOSIT SWEEP	0 53	0 03	18,409 32	5.52
Interest Period 12/01/12 - 12/31/12				
Total Cash and Sweep Balances	**0.57**		**$19,858.72** 4201	**$5.52**

* APYE measures the total amount of the interest paid on an account based on the interest rate and the frequency of the compounding during the interest period The annual percentage yield earned is expressed as an annualized rate, based on a 365 day year

Stocks, options & ETFs

Stocks and ETFs

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	ESTIMATED ANNUAL YIELD (%)
ALERIAN MLP ET AMLP									
On Reinvestment									
Acquired 05/10/11 L		15,000	15 69	235,367.77		239,249 85	3,882 08		
			16 13	241,950.00					
Acquired 02/14/12 S		13,250	16 84	223,130.00		211,337 50	-11,792 50		
Reinvestments S		1,566.96800	16 21	25,412.89		24,993.28	-419 61		
Total	**13.57**	**29,816.96800**		**$483,910.66**	**15.9500**	**$475,580.63**	**-$8,330.03**	**$29,697.70**	**6.24**
				$490,492.89					

Stocks, options & ETFs

Stocks and ETFs continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	ESTIMATED ANNUAL YIELD (%)
BCE INC									
BCE									
On Reinvestment									
Acquired 02/09/12 S		2,500	39 99	99,987 75		107,349 98	7,362.23		
Reinvestments S		84 57400	42 01	3,553.54		3,631.62	78 08		
Total	**3.17**	**2,584.57400**		**$103,541.29**	**42.9400**	**$110,981.60**	**$7,440.31**	**$5,892.05**	**5.31**
CONOCOPHILLIPS		930 00	72.43	67,359.90					
COP		11 985	77.10	924.00					
On Reinvestment									
Acquired 12/23/11 L		12.059	51 56	621.71		53,930 69	2,216 24		
Reinvestments L nc		11.049	56.99	629.67		1,394 31	18 98		
Reinvestments S		11.107	57.35	636 96		1,284 83	18 20		
Total	**1.62**	**976.20000**		**70,172.24**	**57.9900**	**$56,609.83**	**$2,253.42**	**$2,577.16**	**4.55**
ISHARES IBOXX $ YIELDET CORPORATE BOND FUND									
HYG									
On Reinvestment									
Acquired 02/14/12 S		2,750	90.56	249,051 00		256,712 47	7,661 47		
Reinvestments S		159.31400	91 17	14,526.25		14,871 99	345 74		
Total	**7.75**	**2,909.31400**		**$263,577.25**	**93.3500**	**$271,584.46**	**$8,007.21**	**$17,921.37**	**6.60**
MCDONALDS CORP									
MCD									
On Reinvestment									
Acquired 12/23/11 L nc		400	100.15	40,060.00		35,284 00	-4,498 00		
Acquired 02/09/12 S		600	99 98	59,991 60		52,925 99	-7,065 61		
Reinvestments S		31.57000	91.95	2,903.08		2,784 79	-118 29		
Total	**2.60**	**1,031.57000**		**102,954.68**	**88.2100**	**$90,994.78**	**-$11,681.90**	**$3,177.23**	**3.49**
PEPSICO INCORPORATED									
PEP									
On Reinvestment									
Acquired 12/27/11 L		1,006.381	66.38	66,803.57		68,019 41	1,871 21		
Acquired 12/27/11 L						847.23	23 31		
Reinvestments S		27.37300	68.59	1,877 56		1,873 14	-4.42		
Total	**2.02**	**1,033.75400**		**66,681.13**	**68.4300**	**$70,739.78**	**$1,890.10**	**$2,222.57**	**3.14**

JOSEPH H. KANTER FAMILY FOUNDATION

DECEMBER 1 - DECEMBER 31, 2012
ACCOUNT NUMBER 6355-2844

Stocks, options & ETFs

Stocks and ETFs continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	ESTIMATED ANNUAL YIELD (%)
PHILIP MORRIS INTERNATIONAL INC PM									
On Reinvestment									
Acquired 02/09/12 S		1,050	80 75	84,787 50		87,821 99	3,034 49		
Acquired 02/09/12 S		200	80 73	16,146.00		16,728 01	582 01		
Reinvestments S		33 51700	89 93	3,014.43		2,803 36	-211 07		
Total	**3.06**	**1,283.51700**		**$103,947.93**	**83.6400**	**$107,353.36**	**$3,405.43**	**$4,363.95**	**4.07**
PHILLIPS 66 PSX									
On Reinvestment									
Acquired 12/23/11 L		5 99250	35 53	212.95w		318 20	105.25		
			35 32	211 69					
Acquired 12/23/11 L		700	33 05	23,135 78		37,169.99	14,034 21		
Reinvestments S		6 72600	47 35	318 54		357 16	38 62		
Total	**1.08**	**712.71850**		**$23,667.27**	**53.1000**	**$37,845.35**	**$14,178.08**	**$712.71**	**1.88**
				$23,666.01					
SPDR BARCLAYS HIGH YIELD BOND ETF ET JNK									
On Reinvestment									
Acquired 02/14/12 S		6,400	39 48	252,716 80		260,543 94	7,827 14		
Reinvestments S		383 82300	39.68	15,233 48		15,625 49	392 01		
Total	**7.88**	**6,783.82300**		**$267,950.28**	**40.7100**	**$276,169.43**	**$8,219.15**	**$18,641.94**	**6.75**
SPDR GOLD TRUST ET GLD									
Acquired 08/10/11 L nc		375	172 84	64,818 30		60,757.65	-4,060 65		
			173 07	64,902 75					
Acquired 08/10/11 L nc		200	172 83	34,567 74		32,404.08	-2,163.66		
			173 06	34,612.80					
Total	**2.66**	**575**		**$99,386.04**	**162.0204**	**$93,161.73**	**-$6,224.31**	**N/A**	**N/A**
				$99,515.55					
UNILEVER PLC SPONS ADR UL									
On Reinvestment									
Acquired 02/09/12 S		2,075	32 60	67,659 52		80,343 98	12,684.46		
Reinvestments S		93 26600	34.42	3,210 54		3,611 27	400 73		

Stocks, options & ETFs

Stocks and ETFs continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	ESTIMATED ANNUAL YIELD (%)
Total	**2.40**	**2,168.26600**		**$70,870.06**	**38.7200**	**$83,955.25**	**$13,085.19**	**$2,658.29**	**3.17**
VODAFONE GROUP PLC SPONSORED ADR NEW VOD									
On Reinvestment									
Acquired 02/09/12 S		1,700	27 81	47,277 00		42,822 98	-4,454 02		
Acquired 02/09/12 S		700	27.82	19,474 00		17,633 01	-1,840 99		
Reinvestments S		80 77600	29.43	2,377.94		2,034 75	-343 19		
Total	**1.78**	**2,480.77600**		**$69,128.94**	**25.1900**	**$62,490.74**	**-$6,638.20**	**$3,721.16**	**5.95**
Total Stocks and ETFs	**49.57**					**$1,737,466.94**	**$25,604.45**	**$91,586.13**	**5.27**
				$ 1,732,498 25					
Total Stocks, options & ETFs	**49.57**					**$1,737,466.94**	**$25,604.45**	**$91,586.13**	**5.27**

Cost information for one or more securities is not available If you have cost information and would like to see it on future statements, contact Your Financial Advisor
w The cost for this tax lot has been adjusted due to wash sale activity as defined by IRS regulation
nc Cost information for this tax lot is not covered by IRS reporting requirements Unless indicated, cost for all other lots will be reported to the IRS

Mutual Funds

If a portion of your fund position was converted, the 'Client Investment' value may include reinvestments from previously held positions

Open End Mutual Funds

Open End Mutual Fund shares are priced at net asset value. Estimated Annual Income and Yield refer to Dividends and Interest Income only, and typically do not reflect Total return

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	ESTIMATED ANNUAL YIELD (%)
DOUBLELINE FDS TR TOTAL RETURN BD FD CL I DBLTX									
On Reinvestment									
Acquired 05/24/12 S	4.95	15,302 49100	11 24	172,000.00	11 3300	173,377 22	1,377 22	11,002 49	6 34
OPPENHEIMER SENIOR FLOATING RATE FD CL Y OOSYX									
On Reinvestment									
Acquired 05/10/11 L nc		28,217.83800	8.40	237,029 80		233,643.42	-3,386.38		

JOSEPH H. KANTER FAMILY FOUNDATION

DECEMBER 1 - DECEMBER 31, 2012
ACCOUNT NUMBER 6355-2844

Mutual Funds

Open End Mutual Funds continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	ESTIMATED ANNUAL YIELD (%)
Acquired 02/07/12 S		39,194.13900	8 19	321,000 00		324,527.47	3,527 47		
Acquired 03/28/12 S		2,311.43600	8 22	19,000 00		19,138.71	138.71		
Acquired 05/14/12 S		18,203.88300	8 24	150,000 00		150,728 41	728 41		
Total	**20.77**	**87,927.29600**		**$727,029.80**	**8.2800**	**$728,038.01**	**$1,008.21**	**$39,479.35**	**5.42**
PUTNAM DIVERSIFIED Y INCOME TR SH BEN INT PDVYX									
On Reinvestment									
Acquired 05/10/11 L nc		63,054 31700	8 24	519,567 55		486,148 15	-33,419 40		
Acquired 02/07/12 S		19,385 02700	7.48	145,000 00		149,459 19	4,459.19		
Total	**18.14**	**82,439.34400**		**$664,567.55**	**7.7100**	**$635,607.34**	**-$28,960.21**	**$38,581.61**	**6.07**
TEMPLETON FUNDS INCOME TR GLB BD ADVSOR TGBAX									
On Reinvestment									
Acquired 05/10/11 L nc		15,459.44900	13 95	215,659.30		206,228.90	-9,430 40		
Reinvestments L nc		115 47900	12.26	1,415.77		1,540 54	124 77		
Reinvestments S		202 47400	13.20	2,672.66		2,701 10	28.44		
Total	**6.01**	**15,777.40200**		**$219,747.73**	**13.3400**	**$210,470.54**	**-$9,277.19**	**$9,355.99**	**4.45**
	Client Investment (Excluding Reinvestments)					$215,659 30			
	Gain/Loss on Client Investment (Including Reinvestments)					-$5,188.76			
Total Open End Mutual Funds	**49.86**			**$1,783,345.08**		**$1,747,493.11**	**-$35,851.97**	**$98,419.44**	**5.63**
Total Mutual Funds	**49.86**			**$1,783,345.08**		**$1,747,493.11**	**-$35,851.97**	**$98,419.44**	**5.63**

nc Cost information for this tax lot is not covered by IRS reporting requirements Unless indicated, cost for all other lots will be reported to the IRS

	1,732,498.25 +
	1,783,345.08 +
FORM 1099 TIMING DIFF	758.49 +

BOOK VALUE	3,516,601.82 *

	1,737,466.94 +
	1,747,493.11 =

FMV	3,484,960.05 *

JOSEPH H. KANTER FAMILY FOUNDATION

DECEMBER 1 - DECEMBER 31, 2012
ACCOUNT NUMBER: 5792-7687

Additional information

	THIS PERIOD	THIS YEAR
Gross proceeds	99,956 06	194,945 41

Portfolio detail

Cash and Sweep Balances

Bank Deposit Sweep - Consists of monies held at Wells Fargo Bank, N A and (if amounts exceed $250,000) at one or more other Wells Fargo affiliated banks These assets are not covered by SIPC, but are instead eligible for FDIC insurance of up to $250,000 per depositor, per institution, in accordance with FDIC rules For additional information on the Bank Deposit Sweep for your account, please contact Your Financial Advisor.

DESCRIPTION	% OF ACCOUNT	ANNUAL PERCENTAGE YIELD EARNED*	CURRENT MARKET VALUE	ESTIMATED ANNUAL INCOME
BANK DEPOSIT SWEEP	1 67	0 03	4,990 98	1.49
Interest Period 12/01/12 - 12/31/12				
Total Cash and Sweep Balances	**1.67**		**$4,990.98**	**$1.49**

* APYE measures the total amount of the interest paid on an account based on the interest rate and the frequency of the compounding during the interest period. The annual percentage yield earned is expressed as an annualized rate, based on a 365 day year

Stocks, options & ETFs

Stocks and ETFs

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	ESTIMATED ANNUAL YIELD (%)
ISHARES BARCLAYS 10-20 YEAR TREASURY BOND FUND									
TLH									
Acquired 11/12/12 S		132	137.88	18,200 50		17,801 52	-398 98		
Acquired 12/03/12 S		393	137.38	53,990 34		52,999 98	-990 36		
Total	**23.72**	**525**		**$72,190.84**	**134.8600**	**$70,801.50**	**-$1,389.34**	**$1,570.80**	**2.22**
ISHARES RUSSELL MIDCAP VALUE									
IWS									
Acquired 10/02/12 S		499	48.88	24,392 51		25,069 76	677.25		
Acquired 12/03/12 S		961	49.17	47,252 37		48,280 64	1,028 27		
Total	**24.57**	**1,460**		**$71,644.88**	**50.2400**	**$73,350.40**	**$1,705.52**	**$1,534.46**	**2.09**

Stocks, options & ETFs

Stocks and ETFs continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	ESTIMATED ANNUAL YIELD (%)
ISHARES TR RUSSEL MIDCAP GRTH INDX FD IWP									
Acquired 10/02/12 S		397	62.40	24,774.07		24,931 60	157.53		
Acquired 12/03/12 S		763	61.85	47,191 55		47,916 40	724 85		
Total	**24.40**	**1,160**		**$71,965.62**	**62.8000**	**$72,848.00**	**$882.38**	**$958.16**	**1.32**
ISHARES TR -RUSSELL 2000 GROWTH INDEX FD IWO									
Acquired 10/02/12 S		265	96 22	25,499 14		25,257 15	-241 99		
Acquired 12/03/12 S		507	93 21	47,257 47		48,322.17	1,064.70		
Total	**24.65**	**772**		**$72,756.61**	**95.3100**	**$73,579.32**	**$822.71**	**$1,076.94**	**1.46**
PIMCO ETF TRUST ET ENHANCED SHORT MATURITY STRATEGY FUND MINT									
Acquired 12/03/12 S	0.99	29	101.48	2,942 92	101 4800	2,942.92	0 00	31 46	1 06
Total Stocks and ETFs	**98.33**			**$291,500.87**		**$293,522.14**	**$2,021.27**	**$5,171.82**	**1.76**
Total Stocks, options & ETFs	**98.33**			**$291,500.87**		**$293,522.14**	**$2,021.27**	**$5,171.82**	**1.76**