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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2012

Open to Public Inspection

For calendar year 2012, or tax year beginning 01-01-2012 , and ending 12-31-2012

Name of foundation
MARION AND HENRY BLOCH FAMILY FOUNDATION

A Employer identification number
45-4047901

Number and street (or P O box number if mail is not delivered to street address) Room/suite
1 H R BLOCK WAY

B Telephone number (see instructions)
(816) 854-4361

City or town, state, and ZIP code
KANSAS CITY, MO 64105

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)* ▶$ 236,451,390

J Accounting method ☐ Cash ☐ Accrual ☑ Other (specify) MODIFIED CASH
(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 (attach schedule)	229,552,213			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	458	458		
	4	Dividends and interest from securities	5,081,416	5,026,953		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	32,161,188			
	b	Gross sales price for all assets on line 6a 100,577,936				
	7	Capital gain net income (from Part IV, line 2)		32,190,432		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	-27,229,580	441,227		
	12	**Total.** Add lines 1 through 11	239,565,695	37,659,070		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)	24,971	6,243		18,728
	b	Accounting fees (attach schedule)	18,434	14,747		3,687
	c	Other professional fees (attach schedule)	418,768	237,028		181,740
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	438,000	0		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings	7,689	769		6,920
	22	Printing and publications				
	23	Other expenses (attach schedule)	10,443	146		10,297
	24	**Total operating and administrative expenses.** Add lines 13 through 23	918,305	258,933		221,372
	25	Contributions, gifts, grants paid	3,245,821			3,245,821
	26	**Total expenses and disbursements.** Add lines 24 and 25	4,164,126	258,933		3,467,193
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	235,401,569			
	b	**Net investment income** (if negative, enter -0-)		37,400,137		
	c	**Adjusted net income** (if negative, enter -0-)				

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

			Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		246,635	246,635
	2	Savings and temporary cash investments	990,000	4,426,087	4,426,087
	3	Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	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)	0	231,685,849	231,685,849
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)	0	92,819	92,819
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	990,000	236,451,390	236,451,390
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)	0	59,821	
	23	**Total liabilities** (add lines 17 through 22)	0	59,821	
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	990,000	236,391,569	
	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** (see page 17 of the instructions)	990,000	236,391,569	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	990,000	236,451,390	

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	990,000
2	Enter amount from Part I, line 27a	2	235,401,569
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	236,391,569
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	236,391,569

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	See Additional Data Table			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	32,190,432
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2011	10,000	487,575	0 020510
2010			
2009			
2008			
2007			

2	**Total** of line 1, column (d).	2	0 020510
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 020510
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	118,196,488
5	Multiply line 4 by line 3.	5	2,424,210
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	374,001
7	Add lines 5 and 6.	7	2,798,211
8	Enter qualifying distributions from Part XII, line 4.	8	3,467,193

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 page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ____________ **(attach copy of letter if necessary–see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	374,001
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	374,001
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	374,001
6	Credits/Payments				
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a	438,000		
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	438,000
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	63,999
11	Enter the amount of line 10 to be **Credited to 2013 estimated tax** ▶	63,999	**Refunded** ▶	11	0

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

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

			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		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶BLOCHFAMILYFOUNDATION ORG

14 The books are in care of ▶DAVID MILES Telephone no ▶(816) 854-4372

Located at ▶1 H R BLOCK WAY KANSAS CITY MO ZIP+4 ▶64105

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		No

See instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶

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

			Yes	No
	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 page 20 of the instructions)?	1b		No
	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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? ☐ 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)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2012 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?	4b		No

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

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

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
See Additional Data Table				

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

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

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

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

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

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
HRB MANAGEMENT INC 1 H R BLOCK WAY KANSAS CITY, MO 64105	MANAGEMENT	187,133
CAMBRIDGE ASSOCIATES LLC 100 SUMMER STREET BOSTON, MA 02110	INVESTMENT ADVISOR	151,598
Total number of others receiving over $50,000 for professional services. . . . . ▶		0

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

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

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	117,866,407
b	Average of monthly cash balances	1b	2,130,028
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	119,996,435
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	119,996,435
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,799,947
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	118,196,488
6	**Minimum investment return.** Enter 5% of line 5	6	5,909,824

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	5,909,824
2a	Tax on investment income for 2012 from Part VI, line 5 — 2a: 374,001		
b	Income tax for 2012 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	374,001
3	Distributable amount before adjustments Subtract line 2c from line 1	3	5,535,823
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	5,535,823
6	Deduction from distributable amount (see instructions)	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	5,535,823

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	3,467,193
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	3,467,193
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	374,001
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	3,093,192

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				5,535,823
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.			0	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2012				
a From 2007.				
b From 2008.				
c From 2009.				
d From 2010.				
e From 2011. 8,864				
f Total of lines 3a through e.	8,864			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ $ 3,467,193				
a Applied to 2011, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2012 distributable amount.				3,467,193
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).)*	8,864			8,864
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.		0		
d Subtract line 6c from line 6b Taxable amount —see instructions		0		
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				2,059,766
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) . . .	0			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	0			
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)

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2012	**(b)** 2011	**(c)** 2010	**(d)** 2009	
2a 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 organization had $5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

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

HENRY W BLOCH

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

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

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

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

MARION HENRY BLOCH FAMILY FOUNDATIO
ONE HR BLOCK WAY
KANSAS CITY, MO 64105
(816) 854-4361

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

VISIT BLOCHFAMILYFOUNDATION ORG FOR GRANT APPLICATIONS AND SUBMISSION GUIDELINES

c Any submission deadlines

VISIT BLOCHFAMILYFOUNDATION ORG FOR CURRENT SUBMISSION DEADLINES

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

THE FOUNDATION GENERALLY MAKES ONE-YEAR GRANTS HOWEVER, THE FOUNDATION WILL CONSIDER MULTI-YEAR REQUESTS GRANTS ARE MADE ONLY TO TAX EXEMPT 501(C)(3) ORGANIZATONS THAT ARE NOT CLASSIFIED AS PRIVATE FOUNDATIONS THE FOUNDATION CONSIDERS SUPPORT FOR ORGANIZATIONS THAT ARE BASED IN AND SERVICE RESIDENTS WITHIN THE GREATER KANSAS CITY AREA

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*				
See Additional Data Table				
Total . . . . ▶ **3a**				3,245,821
b *Approved for future payment*				
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) Related or exempt function income (See instructions)
1 Program service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	458	
4 Dividends and interest from securities. . . .			14	5,081,416	
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		
8 Gain or (loss) from sales of assets other than inventory			18	32,161,188	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a UNREALIZED LOSS ON INVESTMENTS			14	-27,229,580	
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .		0		10,013,482	0

13 **Total.** Add line 12, columns (b), (d), and (e). 13 10,013,482

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

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

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

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

b If "Yes," complete the following schedule

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

Sign Here

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

****** | 2013-11-14 | ******

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
KAY HEGARTY	KAY HEGARTY			P00091057

Firm's name ▶ MCGLADREY LLP

Firm's EIN ▶ 42-0714325

Firm's address ▶ 221 THIRD AVENUE SE STE 300 CEDAR RAPIDS, IA 524011512

Phone no (319) 298-5333

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

(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)
COMMERCE BONDS	D		
OCTAVIAN	P		
H & R BLOCK STOCK	D	2012-04-25	2012-10-31
PASSTHROUGH FROM SCH K-1 WELLINGTON CTF DIH	P		
PASSTHROUGH FROM SCH K-1 WELLINGTON CTF DIH	P		
WELLINGTON CTF DIH	P		
PASSTHROUGH FROM SCH K-1 LOOMIS SAYLES	P		
PASSTHROUGH FROM SCH K-1 LOOMIS SAYLES	P		
LOOMIS SAYLES	P		
PASSTHROUGH FROM SCH K-1 SSGA US GOVT CREDIT BOND INDEX	P		
PASSTHROUGH FROM SCH K-1 SSGA US GOVT CREDIT BOND INDEX	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - 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)
78,046,429		68,189,137	9,857,292
		8,618	-8,618
22,310,745			22,310,745
		10,933	-10,933
		177,047	-177,047
1,287		1,287	0
30,993			30,993
49,412			49,412
482		482	0
13,431			13,431
125,157			125,157

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

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	
			9,857,292
			-8,618
			22,310,745
			-10,933
			-177,047
			0
			30,993
			49,412
			0
			13,431
			125,157

Form 990PF Part VIII Line 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
HENRY W BLOCH 1 H R BLOCK WAY KANSAS CITY, MO 64105	CHAIRMAN & DIRECTOR 5 00	0	0	0
THOMAS M BLOCH 1 H R BLOCK WAY KANSAS CITY, MO 64105	VICE CHAIRMAN & DIRECTOR 5 00	0	0	0
ROBERT L BLOCH 1 H R BLOCK WAY KANSAS CITY, MO 64105	TREASURER & DIRECTOR 0 50	0	0	0
MARY JO BROWN 1 H R BLOCK WAY KANSAS CITY, MO 64105	ASSISTANT SECRETARY & DIRECTOR 0 50	0	0	0
WILLIAM A HALL 1 H R BLOCK WAY KANSAS CITY, MO 64105	DIRECTOR 0 50	0	0	0
EDWARD T MATHENY JR 1 H R BLOCK WAY KANSAS CITY, MO 64105	DIRECTOR 0 50	0	0	0
FRANK L SALIZZONI 1 H R BLOCK WAY KANSAS CITY, MO 64105	DIRECTOR 0 50	0	0	0
MORTON I SOSLAND 1 H R BLOCK WAY KANSAS CITY, MO 64105	DIRECTOR 0 50	0	0	0
ELIZABETH A UHLMANN 1 H R BLOCK WAY KANSAS CITY, MO 64105	SECRETARY & DIRECTOR 0 50	0	0	0
EVAGELINE RICH 1 H R BLOCK WAY KANSAS CITY, MO 64105	ASSISTANT TREASURER 0 50	0	0	0
DAVID P MILES - STMT 14 1 H R BLOCK WAY KANSAS CITY, MO 64105	PRESIDENT 30 00	118,274	14,483	0

Form 990PF Part XV Line 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*				
AVILA UNIVERSITY 11901 WORNALL ROAD KANSAS CITY, MO 641459990		PUBLIC	AVILA SCHOLARSHIP SUPPORT	10,000
BLUE HILLS COMMUNITY SERVICES CORPORATION 3101 BROADWAY SUITE 770 KANSAS CITY, MO 64111		PUBLIC	5008 BLUE HILLS CENTER AND CONTRACTOR INCUBATOR	50,000
BOYS AND GIRLS CLUBS OF GREATER KANSAS CITY 6301 ROCKHILL ROAD KANSAS CITY, MO 64131		PUBLIC	INDEPENDENCE (FORMERLY LESLIE) UNIT RENOVATION AND EXPANSION	50,000
CHILDREN'S CENTER FOR THE VISUALLY IMPAIRED 3101 MAIN STREET KANSAS CITY, MO 64111		PUBLIC	INFANT THERAPY PROGRAM REIMBURSEMENT	150,000
ENDOWMENT FUND FOR THE HENRY W BLOCH SCHOOL OF MANAGEMENT AT THE GKCCF 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105		PUBLIC	FUNDS TO SUPPORT THE HENRY W BLOCH SCHOOL OF MANAGEMENT	725,000
ENDOWMENT FUND FOR THE HENRY W BLOCH SCHOOL OF MANAGEMENT AT THE GKCCF 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105		PUBLIC	FUNDS TO SUPPORT SPECIAL PROJECTS AT THE BLOCH SCHOOL OF MANAGEMENT	709,098
ENDOWMENT FUND FOR THE HENRY W BLOCH SCHOOL OF MANAGEMENT AT THE GKCCF 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105		PUBLIC	FUNDS TO SUPPORT SALARY INCREASES	133,165
FRANCIS INSTITUTE FOR CHILD & YOUTH DEVELOPMENT MCC-PENN VALLEY 3201 SOUTHWEST TRAFFICWAY KANSAS CITY, MO 64111		PUBLIC	DESIGN AND IMPLEMENTATION OF A CUSTOMIZED ONLINE LEARNING CENTER	50,000
FRIENDS OF UNIVERSITY ACADEMY 4049 PENNSYLVANIA SUITE 400 KANSAS CITY, MO 64111		PUBLIC	GRANT FOR MATCH	6,400
GREATER KANSAS CITY COMMUNITY FOUNDATION 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105		PUBLIC	GRANT FOR MATCH	15,000
HARRIMAN-JEWELL SERIES WILLIAM JEWELL COLLEGE 500 COLLEGE HILL BOX 1015 LIBERTY, MO 64068		PUBLIC	GRANT FOR MATCH	3,000
HARVESTERS - THE COMMUNITY FOOD NETWORK 3801 TOPPING AVENUE KANSAS CITY, MO 64129		PUBLIC	FUNDS TO SUPPORT FOOD ASSISTANCE PROVIDED FOR LOW-INCOME INDIVIDUALS AND FAMILIES	35,000
HYMAN BRAND HEBREW ACADEMY 5801 WEST 115TH STREET SUITE 102 OVERLAND PARK, KS 66211		PUBLIC	FUNDS TO SUPPORT ONGOING PROGRAMS AND OPERATIONS	1,000
JEWISH COMMUNITY RELATIONS BUREAU-AMERICAN JEWISH COMMITTEE 5801 W 115TH SUITE 203 OVERLAND PARK, KS 66211		PUBLIC	IN HONOR OF LEO MORTON, HENRY W BLOCH HUMAN RELATIONS AWARD RECIPIENT	30,000
JEWISH FAMILY SERVICES 5801 WEST 115TH STREET SUITE 103 OVERLAND PARK, KS 662111824		PUBLIC	TO SUPPORT ORGANIZATIONAL TRANSITION AND A NATIONAL SEARCH FOR EXECUTIVE POSITIONS	27,000

Form 990PF Part XV Line 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*				
KANSAS CITY YOUNG AUDIENCES 5601 WYANDOTTE KANSAS CITY,MO 64113		PUBLIC	GRANT FOR MATCH	5,000
KAUFFMAN CENTER FOR THE PERFORMING ARTS 1601 BROADWAY KANSAS CITY,MO 64108		PUBLIC	GRANT FOR MATCH	166
KAUFFMAN CENTER FOR THE PERFORMING ARTS 1601 BROADWAY KANSAS CITY,MO 64108		PUBLIC	FUNDS TO SUPPORT FINAL COSTS FOR THE PERFORMING ARTS CENTER	250,000
KAUFFMAN CENTER FOR THE PERFORMING ARTS 1601 BROADWAY KANSAS CITY,MO 64108		PUBLIC	GRANT FOR MATCH	500
KCPT- PUBLIC TELEVISION 19 125 E 31ST STREET KANSAS CITY,MO 64108		PUBLIC	ACQUISITION OF THE BRIDGE AAA PUBLIC RADIO	150,000
KEMPER MUSEUM OF CONTEMPORARY ART 4420 WARWICK BLVD KANSAS CITY,MO 64111		PUBLIC	FUNDS TO SUPPORT ANNUAL PATRON MEMBERSHIP	1,000
METROPOLITAN COMMUNITY COLLEGE FOUNDATION 3200 BROADWAY KANSAS CITY,MO 64111		PUBLIC	GRANT IN HONOR OF DUNN FAMILY RECOGNITION AT THE 2012 MCC FOUNDATION GALA	5,000
METROPOLITAN COMMUNITY COLLEGE FOUNDATION 3200 BROADWAY KANSAS CITY,MO 64111		PUBLIC	FOR EQUIPMENT AND TECHNOLOGY AT PENN VALLEY COMMUNITY COLLEGE	50,000
MID AMERICA ASSISTANCE COALITION 1 WEST ARMOUR BLVD SUITE 301 KANSAS CITY,MO 64111		PUBLIC	ONGOING PROGRAMS TO PROVIDE EMERGENCY ASSISTANCE FOR LOW-INCOME FAMILIES	35,000
MIDWEST CENTER FOR HOLOCAUST EDUCATION 5801 WEST 115TH STREET SUITE 106 OVERLAND PARK,KS 66211		PUBLIC	ASSOCIATE LEVEL MEMBERSHIP TO SUPPORT HOLOCAUST EDUCATION	100
NEW REFORM TEMPLE 7100 MAIN KANSAS CITY,MO 64114		PUBLIC	FUNDS TO SUPPORT A SPECIAL CAMPAIGN FOR THE BUDGET SHORTFALL	5,000
NEW REFORM TEMPLE 7100 MAIN KANSAS CITY,MO 64114		PUBLIC	GRANT IN MEMORY OF LEON BLOCH	2,500
SAINT LUKE'S HOSPITAL FOUNDATION 4225 BALTIMORE AVENUE KANSAS CITY,MO 64111		PUBLIC	FUNDS TO SUPPORT CONSTRUCTION OF THE SAINT LUKE'S HOSPICE HOUSE	100,000
SETON CENTER FAMILY & HEALTH SERVICES 2816 EAST 23RD STREET KANSAS CITY,MO 64127		PUBLIC	SOCIAL AND DENTAL SERVICES EXPANSION	75,000
SWOPE HEALTH SERVICES 3801 BLUE PARKWAY KANSAS CITY,MO 64130		PUBLIC	INTERIM SUPPORT FOR UNINSURED PATIENTS	50,000

Form 990PF Part XV Line 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*				
THE ARTS COUNCIL OF METROPOLITAN KANSAS CITY 906 GRAND SUITE 10B KANSAS CITY, MO 64106		PUBLIC	TO DEVELOP THE ARTSKC FUNDERS POOL FOR COLLABORATIVE GRANTMAKING FOR AREA SMALL ARTS ORGS	20,000
THE NELSON GALLERY FOUNDATION 4525 OAK STREET KANSAS CITY, MO 64111		PUBLIC	GRANT FOR MATCH	15,000
THE NELSON GALLERY FOUNDATION 4525 OAK STREET KANSAS CITY, MO 64111		PUBLIC	FUNDS TO SUPPORT THE BUSINESS COUNCIL	100,000
THE NELSON GALLERY FOUNDATION 4525 OAK STREET KANSAS CITY, MO 64111		PUBLIC	TO COLLECT ORAL HISTORIES OF THE ART COLLECTIONS OF THE BLOCH, SOSLAND, AND HALL FAMILIES	7,000
THE NELSON GALLERY FOUNDATION 4525 OAK STREET KANSAS CITY, MO 64111		PUBLIC	FUNDS TO SUPPORT THE SHUTTLECORK WINE EVENT IN JANUARY 2013	25,000
THE NELSON GALLERY FOUNDATION 4525 OAK STREET KANSAS CITY, MO 64111		PUBLIC	GRANT FOR MATCH	1,000
THE TEMPLE CONGREGATION B'NAI JEHUDAH 12320 NALL AVE OVERLAND PARK, KS 66209		PUBLIC	GRANT FOR MATCH	960
TOY AND MINIATURE MUSEUM 5235 OAK STREET KANSAS CITY, MO 64112		PUBLIC	GRANT FOR MATCH	332
TRUMAN MEDICAL CENTER CHARITABLE FOUNDATION 2310 HOLMES SUITE 735 KANSAS CITY, MO 64108		PUBLIC	BETTER HEALTH FOR A BETTER LIFE	250,000
TURNER HOUSE CHILDREN'S CLINIC 21 NORTH 12TH STREET SUITE 300 KANSAS CITY, KS 66102		PUBLIC	FUNDS TO ADD AND EQUIP A TREATMENT/PROCEDURE ROOM AT THE CLINIC	19,000
UMKC FOUNDATION 300B ADMINISTRATIVE CENTER 5100 ROCKHILL ROAD KANSAS CITY, MO 64110		PUBLIC	GRANT FOR MATCH	5,000
UMKC FOUNDATION 300B ADMINISTRATIVE CENTER 5100 ROCKHILL ROAD KANSAS CITY, MO 64110		PUBLIC	GRANT FOR MATCH	13,000
UMKC FOUNDATION 300B ADMINISTRATIVE CENTER 5100 ROCKHILL ROAD KANSAS CITY, MO 64110		PUBLIC	GRANT FOR MATCH	4,000
UMKC FOUNDATION 300B ADMINISTRATIVE CENTER 5100 ROCKHILL ROAD KANSAS CITY, MO 64110		PUBLIC	IN HONOR OF LANNY SOLOMON, ASSOCIATE DEAN, HENRY W BLOCH SCHOOL OF MANAGEMENT	1,000
UMKC FOUNDATION 300B ADMINISTRATIVE CENTER 5100 ROCKHILL ROAD KANSAS CITY, MO 64110		PUBLIC	GRANT FOR MATCH	5,000

Form 990PF Part XV Line 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*				
UMKC FOUNDATION 300B ADMINISTRATIVE CENTER 5100 ROCKHILL ROAD KANSAS CITY, MO 64110		PUBLIC	GRANT FOR MATCH	5,000
UMKC FOUNDATION 300B ADMINISTRATIVE CENTER 5100 ROCKHILL ROAD KANSAS CITY, MO 64110		PUBLIC	GRANT FOR MATCH	8,400
UNITED WAY OF GREATER KANSAS CITY PO BOX 877888 801 WEST 47TH STREET SUITE 500 KANSAS CITY, MO 64187		PUBLIC	FUNDS TO SUPPORT UNITED FOR HOPE/ UNITED TO HELP 2012	25,000
UNITED WAY OF GREATER KANSAS CITY PO BOX 877888 801 WEST 47TH STREET SUITE 500 KANSAS CITY, MO 64187		PUBLIC	GRANT FOR MATCH	10,000
UNIVERSITY OF KANSAS ENDOWMENT ASSOCIATION 1891 CONSTANT AVE LAWRENCE, KS 66047		PUBLIC	GRANT FOR MATCH	6,000
VILLAGE SHALOM INC 5500 W 123RD STREET OVERLAND PARK, KS 66209		PUBLIC	GRANT FOR MATCH	200
WAYSIDE WAIFS KANSAS CITY HUMANE SOCIETY 3901 MARTHA TRUMAN ROAD KANSAS CITY, MO 64137		PUBLIC	GRANT FOR MATCH	1,000
Total . . . . ▶ **3a**				3,245,821

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

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF.**

OMB No 1545-0047

2012

Name of the organization
MARION AND HENRY BLOCH FAMILY FOUNDATION

Employer identification number
45-4047901

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
MARION AND HENRY BLOCH FAMILY FOUNDATION

Employer identification number
45-4047901

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	MARION HENRY BLOCH 6400 WENONGA TERRACE SHAWNEE MISSION, KS 66205	$ 99,000,000	Person ☑ Payroll ☐ Noncash ☑ (Complete Part II if there is a noncash contribution)
2	MARION HENRY BLOCH 6400 WENONGA TERRACE SHAWNEE MISSION, KS 66205	$ 130,552,213	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)

Name of organization
MARION AND HENRY BLOCH FAMILY FOUNDATION

Employer identification number
45-4047901

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
1	$158,465 CASH, $76,955,870 OF COMMERCE BONDS, $21,885,665 OF SHARES H&R BLOCK	$ 99,000,000	2012-04-25

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	COMMERCE BONDS	$ 130,552,213	2012-09-17

(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
MARION AND HENRY BLOCH FAMILY FOUNDATION

Employer identification number
45-4047901

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 See instructions) ▶ $
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

TY 2012 Accounting Fees Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING AND AUDIT FEES	18,434	14,747		3,687

TY 2012 General Explanation Attachment

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Identifier	Return Reference	Explanation
	FORM 990-PF, PART VIII, LINE 1, OFFICER COMPENSATION	THE FOUNDATION HAS NO EMPLOYEES ALL MANAGEMENT SERVICES ARE PROVIDED THROUGH HRB MANAGEMENT, INC WHO IS PAID A MANAGEMENT FEE AS DISCLOSED IN PART VIII, LINE 3 OFFICER DAVID P MILES IS AN EMPLOYEE OF AND IS PAID BY HRB MANAGEMENT, INC PURSUANT TO THE FORM 990-PF INSTRUCTIONS, COMPENSATION PAID TO THE MANAGEMENT SERVICES COMPANY FOR THE SERVICES PROVIDED BY THE FOUNDATION OFFICER IS REPORTED IN PART VIII, LINE 1 AS IF THE FOUNDATION HAD PAID THE OFFICER DIRECTLY OFFICER COMPENSATION REPORTED IN PART VIII, LINE 1 IS ALSO INCLUDED IN THE AMOUNT PAID TO HRB MANAGEMENT, INC IN PART VIII, LINE 3

TY 2012 Investments - Other Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
WELLINGTON CTF DIH	FMV	7,048,690	7,048,690
LOOMIS SAYLES	FMV	5,434,319	5,434,319
SCHWAB - DOUBLELINE TOTAL RETURN	FMV	5,141,492	5,141,492
SSGA - INTERMED US GOVT/CREDIT BOND	FMV	14,860,033	14,860,033
GRUSS GLOBAL INVESTORS	FMV	2,061,320	2,061,320
OCTAVIAN OFFSHORE FUND	FMV	1,737,267	1,737,267
FIR TREE INTL VALUE FUND	FMV	2,246,910	2,246,910
COVALENT CAPITAL PARTNERS	FMV	2,178,808	2,178,808
MASON CAPITAL LTD	FMV	1,895,296	1,895,296
COMMERCE BONDS	FMV	125,241,156	125,241,156
SCHWAB - DFA EMERGING MKTS	FMV	10,443,300	10,443,300
SCHWAB - VANGUARD DEVELOPED MKTS	FMV	26,121,165	26,121,165
SCHWAB - VANGUARD DIV APPR	FMV	6,192,080	6,192,080
SCHWAB - VANGUARD RUSSELL 3000	FMV	14,038,309	14,038,309
SCHWAB - FIRST PACIFIC ADVISORS	FMV	7,045,704	7,045,704

TY 2012 Legal Fees Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	24,971	6,243		18,728

TY 2012 Other Assets Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTEREST RECEIVABLE	0	92,819	92,819

TY 2012 Other Expenses Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INFORMATION TECHNOLOGY	5,627	0		5,627
SPECIAL EVENT EXPENSE	1,899	0		1,899
SUBSCRIPTIONS/PUBLICATIONS	1,021	51		970
MISCELLANEOUS	1,896	95		1,801

TY 2012 Other Income Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PASSTHROUGH INCOME FROM SCH K-1S	0	441,227	0
UNREALIZED LOSS ON INVESTMENTS	-27,229,580		-27,229,580

TY 2012 Other Liabilities Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Description	Beginning of Year - Book Value	End of Year - Book Value
DUE TO HRB MANAGEMENT, INC.	0	59,821

TY 2012 Other Professional Fees Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISOR AND SERVICE FEES	207,765	207,765		0
MANAGEMENT FEES	187,133	28,070		159,063
CONSULTING FEES	19,870	993		18,877
PUBLIC RELATIONS	4,000	200		3,800

TY 2012 Taxes Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	438,000	0		0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2012 Functional Currency and Exchange Rate QBU Statement

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

QBU Id	Country of Operation	Functional Currency
USD		1

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2012 Functional Currency and Exchange Rate QBU Statement

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

QBU Id	Country of Operation	Functional Currency
USD		1