



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form **990-PF**

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

Department of the Treasury
Internal Revenue Service

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

OMB No 1545-0052

2012

Open to Public Inspection

For calendar year 2012 or tax year beginning , and ending

Name of foundation BARTON AND SHIRLEY WEISMAN FOUNDATION, INC.		A Employer identification number 58-2684069
Number and street (or P O box number if mail is not delivered to street address) 17603 LAKE ESTATES DRIVE	Room/suite	B Telephone number (see instructions) 954-491-2000
City or town, state, and ZIP code BOCA RATON FL 33496		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization. <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 6,129,349	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	307,550			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	18	18		
	4 Dividends and interest from securities	159,751	159,751		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	3,324			
	b Gross sales price for all assets on line 6a 59,204				
	7 Capital gain net income (from Part IV, line 2)		3,324		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	470,643	163,093	0	
	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 1	2,850	2,850		
	c Other professional fees (attach schedule)				
	17 Interest STMT 2	3	3		
	18 Taxes (attach schedule) (see instructions)	11,174	11,174		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att. sch) STMT 3	774	774		
	24 Total operating and administrative expenses. Add lines 13 through 23	14,801	14,801	0	0
	25 Contributions, gifts, grants paid SEE STATEMENT 4	307,210			307,210
	26 Total expenses and disbursements. Add lines 24 and 25	322,011	14,801	0	307,210
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	148,632			
	b Net investment income (if negative, enter -0-)		148,292		
	c Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2012)

P 13

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash – non-interest-bearing			
	2 Savings and temporary cash investments	210,899	144,320	144,320
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (att. schedule) ▶ Less: allowance for doubtful accounts ▶	0		
	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) SEE STMT 5	1,926,881	2,042,019	5,985,029
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach sch.) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach sch.) ▶			
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers – see the instructions. Also, see page 1, item I)	2,137,780	2,186,339	6,129,349	
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 ▶)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	1,735,647	1,735,647	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	402,133	450,692	
	30 Total net assets or fund balances (see instructions)	2,137,780	2,186,339	
31 Total liabilities and net assets/fund balances (see instructions)	2,137,780	2,186,339		

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	2,137,780
2 Enter amount from Part I, line 27a	2	148,632
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	2,286,412
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 6	5	100,073
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	2,186,339

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 ATTACHED SCHEDULE	P	VARIOUS	VARIOUS
b	KRAFT FOODS GROUP INC	P	07/09/08	10/01/12
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 59,172		55,859	3,313
b 32		21	11
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			3,313
b			11
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	3,324
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 </div>	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 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	426,545	3,922,998	0.108729
2010	548,161	3,572,152	0.153454
2009	384,028	2,729,588	0.140691
2008	334,574	2,990,236	0.111889
2007	510,715	3,411,962	0.149684

2 Total of line 1, column (d)	2	0.664447
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	0.132889
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	5,309,376
5 Multiply line 4 by line 3	5	705,558
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,483
7 Add lines 5 and 6	7	707,041
8 Enter qualifying distributions from Part XII, line 4	8	307,210

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 <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b	1	2,966
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	2,966
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	2,966
6	Credits/Payments		
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a	7,800
b	Exempt foreign organizations – tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	7,800
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	4,834
11	Enter the amount of line 10 to be Credited to 2013 estimated tax 2,990 Refunded	11	1,844

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

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? Website address ► N/A	13	X	
14	The books are in care of ► SHIRLEY WEISMAN 17603 LAKE ESTATES DR. Located at ► BOCA RATON FL ZIP+4 ► 33496 Telephone no. ► <input type="checkbox"/>			
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			
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	Yes	No X

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

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

		Yes	No
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	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)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/> N/A	1b	
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? N/A	1c	
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? If "Yes," list the years ► 20 , 20 , 20 , 20 <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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 ► 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? (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)?

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 (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
BARTON WEISMAN	BOCA RATON	DIRECTOR			
17603 LAKE ESTATES DRIVE	FL 33496	1.00	0	0	0
SHIRLEY WEISMAN	BOCA RATON	DIRECTOR			
17603 LAKE ESTATES DRIVE	FL 33496	1.00	0	0	0
ANDREW WEISMAN	CORAL SPRINGS	DIRECTOR			
7650 N.W. 47TH DRIVE	FL 33067	0.00	0	0	0
MARCIA LANGLEY	BOCA RATON	DIRECTOR			
17735 FIELDBROOK CIRCLE N	FL 33496	0.00	0	0	0

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

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

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

▶ **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
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 N/A	
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 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	5,212,619
b	Average of monthly cash balances	1b	177,610
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	5,390,229
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	5,390,229
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	80,853
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,309,376
6	Minimum investment return. Enter 5% of line 5	6	265,469

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	265,469
2a	Tax on investment income for 2012 from Part VI, line 5	2a	2,966
b	Income tax for 2012 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,966
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	262,503
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	262,503
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	262,503

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	307,210
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	307,210
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	307,210

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				262,503
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only				
b Total for prior years. 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2012.				
a From 2007	344,687			
b From 2008	192,314			
c From 2009	250,295			
d From 2010	378,973			
e From 2011	238,185			
f Total of lines 3a through e	1,404,454			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 307,210				
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				262,503
e Remaining amount distributed out of corpus	44,707			
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	1,449,161			
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 instructions				
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)	344,687			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	1,104,474			
10 Analysis of line 9				
a Excess from 2008	192,314			
b Excess from 2009	250,295			
c Excess from 2010	378,973			
d Excess from 2011	238,185			
e Excess from 2012	44,707			

Form **990-PF** (2012)

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 STATEMENT 7				307,210
Total			▶ 3a	307,210
b Approved for future payment N/A				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated				
Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue				
a				
b				
c				
d				
e				
f				
g Fees and contracts from government agencies				
2 Membership dues and assessments				
		14	18	
3 Interest on savings and temporary cash investments		14	159,751	
4 Dividends and interest from securities				
5 Net rental income or (loss) from real estate				
a Debt-financed property				
b Not debt-financed property				
6 Net rental income or (loss) from personal property				
7 Other investment income				
8 Gain or (loss) from sales of assets other than inventory				3,324
9 Net income or (loss) from special events				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue a				
b				
c				
d				
e				
12 Subtotal. Add columns (b), (d), and (e)		0	159,769	3,324
13 Total. Add line 12, columns (b), (d), and (e)			13	163,093

(See worksheet in line 13 instructions to verify calculations)

[illegible]

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

**BARTON AND SHIRLEY WEISMAN
FOUNDATION, INC.**

Employer identification number

58-2684069

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 $\frac{1}{3}$ % 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).

For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2012)

Name of organization

BARTON AND SHIRLEY WEISMAN

Employer identification number

58-2684069

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	BARTON AND SHIRLEY WEISMAN 17603 LAKE ESTATE DRIVE BOCA RATON FL 33496-1425	\$ 307,550	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization

BARTON AND SHIRLEY WEISMAN

Employer identification number

58-2684069

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	5,000 SHARES OF HEALTH CARE	\$ 110,950	09/21/12
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	4,000 SHARES OF HEALTH CARE	\$ 96,600	11/06/12
(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
		\$	

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
GZWP, CPA	\$ 2,850	\$ 2,850	\$	\$
TOTAL	\$ 2,850	\$ 2,850	\$ 0	\$ 0

Statement 2 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FOREIGN TAX	\$ 195	\$ 195	\$	\$
TAX ON NET INVESTMENT INCOME	10,979	10,979		
TOTAL	\$ 11,174	\$ 11,174	\$ 0	\$ 0

Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	\$
INVESTMENT FEES	12	12		
OTHER EXPENSES	762	762		
TOTAL	\$ 774	\$ 774	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part I, Line 25 - Noncash Contributions, Gifts, Grants

<u>Amount</u>	<u>Noncash Description</u>	<u>FMV Explanation</u>	<u>Book Value Amount</u>	<u>Book Value Explanation</u>	<u>Date</u>
6,000			6,000		

Federal Statements

Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
SEE ATTACHED SCHEDULE 1	\$ 476,663	\$ 484,324	COST	\$ 563,844
HEALTH CARE SERVICES GROUP	1,450,218	1,557,695	COST	5,421,185
TOTAL	<u>\$ 1,926,881</u>	<u>\$ 2,042,019</u>		<u>\$ 5,985,029</u>



Ref: 00000103 00012820

2012 Year End Summary

BARTON AND SHIRLEY WEISMAN FOU
Account Number 600-48706-11 938

Details of Long Term Gain (Loss) 2012

This section shows your sales of securities during the year. The "Sale Proceeds" column excludes any accrued income you may have received. In addition, although cash in lieu less than \$20 is not included on Form 1099-B (if applicable), it is included in this section. Please note, this material is being prepared for informational purposes only and should not be used for tax preparation without the assistance of your tax advisor.

2 0 1 2 Y E A R E N D S :

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Cost	(Loss)	Gain
125000010	53	WTS AMERICAN INTL GROUP EXP 1/19/2021	01/20/11	02/08/12	\$ 349.09	\$ 857.01	(\$ 507.92)	
125000020	300	APPLIED MATERIALS INC DELAWARE	08/20/05	02/08/12	3,772.26	5,077.00	(1,304.74)	
	200	CGMI AND/OR ITS AFFILIATES	11/28/05		2,514.84	3,677.00	(1,162.16)	
	200		10/21/10		2,514.83	2,403.40		111.43
125000030	200	BANCO SANTANDER S.A.	10/21/10	02/08/12	1,884.66	2,697.40	(1,012.74)	
125000040	200	GENERAL MILLS INC	11/28/05	02/08/12	7,926.46	4,855.00		3,071.46
125000050	50	KIMBERLY CLARK CORP	09/09/09	02/08/12	3,600.43	2,898.00		702.43
125000060	100	LINEAR TECHNOLOGY CORPORATION	08/06/07	02/08/12	3,408.26	3,809.00	(200.74)	
	200	CGMI AND/OR ITS AFFILIATES	12/24/07		6,816.53	6,536.56		279.97
125000070	50	MEDTRONIC INC	02/11/05	02/08/12	2,027.62	2,708.50	(680.88)	
	100		06/20/05		4,055.23	5,354.00	(1,298.77)	
	50		12/03/09		2,027.62	2,185.00	(157.38)	
	100		10/21/10		4,055.22	3,558.70		496.52
125000080	100	SCHLUMBERGER LTD	02/11/05	02/08/12	7,855.30	3,712.50		4,242.80
125000080	100	SONOCO PRODUCTS CO	02/11/05	02/08/12	3,231.94	2,933.00		298.94
	100		06/20/05		3,231.93	2,797.00		434.93
Total					\$ 59,172.22	\$ 56,869.07	(\$ 8,325.33)	\$ 9,838.48

Basic Securities Account
718-21047938
BARTON AND SHIRLEY WEISMAN EOU
BARTON WEISMAN, DI

Holdings

STOCKS

COMMON STOCKS

Morgan Stanley & Co. LLC (Morgan Stanley), Citi Investment Research & Analysis (CIRA), and Standard & Poor's equity research ratings may be shown for certain securities. All research ratings represent the "opinions" of the research provider and are not representations or guarantees of performance. Because the applicable research report contains more complete information regarding the analyst's opinions, analysis, and rating, you should read the entire research report and not infer its contents from the rating. Where a particular company is covered by both Morgan Stanley and CIRA, you can and should view both research reports. CIRA's equity research ratings are (1) Buy, (2) Neutral and (3) Sell. For ease of comparison, Morgan Stanley and Standard & Poor's equity research ratings have been normalized to a 1 (Buy), 2 (Hold), and 3 (Sell). Please refer to the quarter month-end statement (or your first statement, if you have not yet received a statement at the quarter-end) for a summary guide describing Morgan Stanley, CIRA and Standard & Poor's ratings. Morgan Stanley Smith Barney LLC does not take responsibility for, and does not guarantee the accuracy, completeness, or timeliness of research prepared for Standard & Poor's.

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
3M COMPANY (MMM)	3/10/06	50,000	\$72.790	\$3,639.51	\$4,642.50	\$1,002.99 LT	\$118.00	2.54
Share Price: \$92.850; Rating: Morgan Stanley, 1, Citigroup: 2, S&P: 2, Next Dividend Payable 03/2013								
ABBOTT LABORATORIES (ABT)	9/9/09	100,000	46.358	4,635.84	6,550.00	1,914.16 LT		
	10/21/10	50,000	53.100	2,655.00	3,275.00	620.00 LT		
Total		150,000		7,290.84	9,825.00	2,534.16 LT	84.00	0.85
Share Price: \$65.500; Rating: Morgan Stanley: 2, Citigroup: 3, S&P: 1, Next Dividend Payable 02/2013								
ALCOA INC (AA)	2/11/05	100,000	30.510	3,051.00	868.00	(2,183.00) LT		
	6/20/05	100,000	28.590	2,859.00	868.00	(1,991.00) LT		
	11/28/05	100,000	28.350	2,835.00	868.00	(1,967.00) LT		
	9/9/09	300,000	12.858	3,857.52	2,604.00	(1,253.52) LT		
	11/15/11	400,000	10.362	4,144.76	3,472.00	(672.76) LT		
Total		1,000,000		16,747.28	8,680.00	(8,067.28) LT	120.00	1.38
Share Price: \$8.680; Rating: Morgan Stanley: 1, Citigroup: 2, S&P: 1, Next Dividend Payable 02/2013								
ALLSCRIPTS HEALTHCARE SOLU INC (MDRX)	10/21/10	200,000	18.800	3,760.00	1,884.00	(1,876.00) LT		
	2/6/12	200,000	20.876	4,175.26	1,884.00	(2,291.26) ST		
Total		400,000		7,935.26	3,768.00	(1,876.00) LT	--	--
Share Price: \$9.420; Rating: Morgan Stanley: 2, Citigroup: 2								
AMER INTL GP INC NEW (AIG)	12/20/04	25,000	1,292.300	32,307.50	882.50	(31,425.00) LT 1		
	12/3/09	75,000	21.980	1,648.50	2,647.50	999.00 LT		
	2/6/12	200,000	26.820	5,364.00	7,060.00	1,696.00 ST		
Total		300,000		39,320.00	10,590.00	(30,426.00) LT	--	--
Share Price: \$35.300; Rating: Morgan Stanley: 2, S&P: 1								
AMGEN INC (AMGN)	9/9/09	50,000	59.020	2,951.00	4,310.00	1,359.00 LT		
	12/3/09	50,000	56.700	2,835.00	4,310.00	1,475.00 LT		

CONTINUED

Holdings

BASIC SECURITIES ACCOUNT
719121047-538
BARTON AND SHIRLEY WEISMAN FBO
BARTON WEISMAN, JR.

STOCKS

COMMON STOCKS (CONTINUED)

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
Share Price: \$86.200; Rating: Morgan Stanley 2, Citigroup: 1, S&P 1, Next Dividend Payable 03/2013	Total	100 000		5,786.00	8,620.00	2,834.00 LT	188.00	2.18
BRISTOL MYERS SQUIBB CO (BMY)								
	2/11/05	100 000	24.420	2,442.00	3,259.00	817.00 LT		
	4/14/05	100 000	26.610	2,661.00	3,259.00	598.00 LT		
	6/20/05	100 000	26.180	2,618.00	3,259.00	641.00 LT		
Total		300 000		7,721.00	9,777.00	2,056.00 LT	420.00	4.29
Share Price: \$32.590; Rating: Morgan Stanley 2, S&P 2, Next Dividend Payable 02/2013								
CENTURYLINK INC (CTL)								
	11/15/11	200 000	37.450	7,490.00	7,824.00	334.00 LT		
	2/6/12	100 000	38.177	3,817.69	3,912.00	94.31 ST		
Total		300 000		11,307.69	11,736.00	334.00 LT	870.00	7.41
Share Price: \$39.120; Rating: Morgan Stanley 1, Citigroup: 1H, S&P 2, Next Dividend Payable 03/2013								
CERNER CORP (CERN)								
	10/21/10	50 000	43.350	2,167.50	3,875.50	1,708.00 LT		
	2/6/12	100 000	62.740	6,274.00	7,751.00	1,477.00 ST		
Total		150 000		8,441.50	11,626.50	1,708.00 LT	—	—
Share Price: \$77.510; Rating: Morgan Stanley 2, Citigroup: 1, S&P: 1								
CISCO SYS INC (CSCO)								
	4/14/05	100 000	18.215	1,821.50	1,964.94	143.44 LT		
	11/28/05	300 000	17.537	5,261.03	5,894.82	633.79 LT		
Total		400 000		7,082.53	7,859.76	777.23 LT	224.00	2.84
Share Price: \$19.649; Rating: Morgan Stanley 1, Citigroup: 1, S&P: 1, Next Dividend Payable 03/2013								
CITIGROUP INC NEW (C)								
	10/21/10	100 000	41.540	4,154.00	3,956.00	(198.00) LT		
	11/15/11	100 000	28.068	2,806.80	3,956.00	1,149.20 LT		
Total		200 000		6,960.80	7,912.00	951.20 LT	8.00	0.10
Share Price: \$39.560; Rating: Morgan Stanley 1, S&P: 1, Next Dividend Payable 02/2013								
COCA COLA CO (KO)								
	2/11/05	200 000	21.700	4,340.00	7,250.00	2,910.00 LT		
	6/20/05	100 000	22.200	2,220.00	3,625.00	1,405.00 LT		
Total		300 000		6,560.00	10,875.00	4,315.00 LT	306.00	2.81

CONTINUED

Basic Securities Account: BARTON AND SHIRLEY WEISMAN FOU
719-721-047-638 BARON WEISMAN, DR

Holdings

STOCKS

COMMON STOCKS (CONTINUED)

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
COLGATE PALMOLIVE CO (CL)	2/11/05	50 000	55.330	2,766.50	5,227.00	2,460.50 LT	124.00	2.37
Share Price: \$104.540; Rating: Morgan Stanley, 1, Citigroup: 2, S&P: 1; Next Dividend Payable 02/2013								
COMCAST CORP CL A SPECIAL NEW (CMCSK)	12/24/07	400 000	18.250	7,300.12	14,368.00	7,067.88 LT	260.00	1.80
Share Price: \$35.920; Rating: S&P: 1, Next Dividend Payable 01/23/13								
COSTCO WHOLESALE CORP NEW (COST)	12/20/04	150 000	47.750	7,162.50	14,809.50	7,647.00 LT 1	165.00	1.11
Share Price: \$98.730; Rating: Morgan Stanley, 1, Citigroup: 2, S&P: 2, Next Dividend Payable 03/2013								
DANAHER CORPORATION (DHR)	11/15/11	100 000	49.507	4,950.69	5,590.00	639.31 LT		
	2/6/12	100 000	52.837	5,283.69	5,590.00	306.31 ST		
Total		200 000		10,234.38	11,180.00	639.31 LT	20.00	0.17
						306.31 ST		
Share Price: \$55.900; Rating: Morgan Stanley, 1, Citigroup: 1, S&P: 2, Next Dividend Payable 03/2013								
DELTA AIR LINES INC NEW (DAL)	11/15/11	1,000 000	8.106	8,106.00	11,870.00	3,764.00 LT		
Share Price: \$11.870; Rating: Morgan Stanley, 1, S&P: 1								
DENTSPLY INTERNATIONAL INC (XRAY)	12/27/05	200 000	27.360	5,472.01	7,922.00	2,449.99 LT		
	10/21/10	100 000	32.510	3,251.00	3,961.00	710.00 LT		
Total		300 000		8,723.01	11,883.00	3,159.99 LT	66.00	0.55
Share Price: \$39.610; Rating: Morgan Stanley, 2, Citigroup: 2, S&P: 1, Next Dividend Payable 01/11/13								
ECOLAB INC (ECL)	12/20/04	200 000	34.560	6,912.00	14,380.00	7,468.00 LT 1	184.00	1.27
Share Price: \$71.900; Rating: Citigroup: 2, S&P: 2, Next Dividend Payable 03/2013								
EQUINIX INC NEW (EQIX)	11/15/11	50 000	99.630	4,981.50	10,310.00	5,328.50 LT		
Share Price: \$206.200; Rating: Morgan Stanley, 2, Citigroup: 1								
EXPEDITORS INTL WASH INC (EXPD)	6/6/07	100 000	42.990	4,299.00	3,955.00	(344.00) LT		
	9/15/08	100 000	36.490	3,649.00	3,955.00	306.00 LT		
Total		200 000		7,948.00	7,910.00	(38.00) LT	112.00	1.41
Share Price: \$39.550; Rating: Morgan Stanley, 3, S&P: 1, Next Dividend Payable 06/2013								
FORD MOTOR CO NEW (F)	11/15/11	700 000	10.945	7,661.76	9,065.00	1,403.24 LT	140.00	1.54
Share Price: \$12.950; Rating: Morgan Stanley, 1, Citigroup: 1H, S&P: 1; Next Dividend Payable 03/2013								
GANNETT COMPANY INC DE (GCI)	7/9/08	100 000	19.572	1,957.23	1,801.00	(156.23) LT		
	9/15/08	200 000	17.671	3,534.12	3,602.00	67.88 LT		
	9/9/09	500 000	8.159	4,079.50	9,005.00	4,925.50 LT		

CONTINUED

BARTON AND SHIRLEY WEISMAN FOU
BARTON WEISMAN, DIBasic Securities Account
779 121047 538

Holdings

STOCKS

COMMON STOCKS (CONTINUED)

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
Share Price: \$18.010, Rating: Citigroup: 2, S&P: 2; Next Dividend Payable 01/02/13								
GENERAL ELECTRIC CO (GE)		800 000		9,570.85	14,408.00	4,837.15 LT	640.00	4.44
Total								
	11/5/07	200 000	38.030	7,606.00	4,198.00	(3,408.00) LT		
	6/6/07	50 000	37.430	1,871.50	1,049.50	(822.00) LT		
	7/9/08	100 000	27.648	2,764.78	2,099.00	(665.78) LT		
	12/3/09	250 000	16.234	4,058.48	5,247.50	1,189.02 LT		
Total								
		600 000		16,300.76	12,594.00	(3,706.76) LT	456.00	3.62
Share Price: \$20.990, Rating: Morgan Stanley: 2, Citigroup: 1, S&P: 2, Next Dividend Payable 01/25/13								
GENERAL MTRS CO (GM)		400 000	23.192	9,276.60	11,532.00	2,255.40 LT		
Share Price: \$28.830, Rating: Morgan Stanley: 1, Citigroup: 1H, S&P: 1								
GOOGLE INC-CL A (GOOG)		10 000	609.760	6,097.60	7,073.80	976.20 ST		
Share Price: \$707.380, Rating: Morgan Stanley: 1, Citigroup: 1, S&P: 2								
HARMAN INTL INDS NEW (HAR)		100 000	35.737	3,573.65	4,464.00	890.35 LT	60.00	1.34
Share Price: \$44.640, Rating: Morgan Stanley: 3, S&P: 1, Next Dividend Payable 02/20/13								
HERTZ GLOBAL HOLDINGS, INC (HTZ)		500 000	11.899	5,949.25	8,135.00	2,185.75 LT		
Share Price: \$16.270, Rating: Morgan Stanley: 1								
HSBC HOLDINGS PLC SPON ADR NEW (HBC)		75 000	50.380	4,528.50	3,980.25	(548.25) LT		
	10/21/10	75 000	53.080	3,981.00	3,980.25	(0.75) LT		
	11/15/11	50 000	40.030	2,001.50	2,653.50	652.00 LT		
Total								
		200 000		10,511.00	10,614.00	103.00 LT	500.00	4.71
Share Price: \$53.070, Rating: S&P: 1								
ILL TOOL WORKS INC (ITW)		100 000	46.500	4,650.00	6,081.00	1,431.00 LT	152.00	2.49
Share Price: \$60.810, Rating: Morgan Stanley: 3, Citigroup: 2, S&P: 1, Next Dividend Payable 03/20/13								
ILLUMINA INC (ILMN)		200 000	31.490	6,298.02	11,118.00	4,819.98 LT		
Share Price: \$55.590, Rating: Morgan Stanley: 2, Citigroup: 2, S&P: 2								
INTEL CORP (INTC)		300 000	19.964	5,989.34	6,186.00	196.66 LT		
	10/21/10	200 000	19.777	3,955.40	4,124.00	168.60 LT		
Total								
		500 000		9,944.74	10,310.00	365.26 LT	450.00	4.36
Share Price: \$20.620, Rating: Morgan Stanley: 3, Citigroup: 2, S&P: 2, Next Dividend Payable 03/20/13								

CONTINUED

Basic Securities Account
BARTON AND SHIRLEY WEISMAN FOD
BARTON WEISMAN, DL

Holdings

STOCKS

COMMON STOCKS (CONTINUED)

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
INTL BUSINESS MACHINES CORP (IBM)	10/21/10	25 000	140.540	3,513.50	4,788.75	1,275.25 LT	85.00	1.77
Share Price: \$191.550; Rating: Morgan Stanley: 2, Citigroup: 1, S&P: 1; Next Dividend Payable 03/2013								
JOHNSON & JOHNSON (JNJ)	12/3/09	100 000	64.377	6,437.70	7,010.00	572.30 LT		
	10/21/10	50 000	64.290	3,214.50	3,505.00	290.50 LT		
Total		150,000		9,652.20	10,515.00	862.80 LT	366.00	3.48
Share Price: \$70.100; Rating: Morgan Stanley: 2, Citigroup: 1, S&P: 1, Next Dividend Payable 03/2013								
JOHNSON CONTROLS INCORPORATED (JCI)	10/21/10	100 000	33.997	3,399.70	3,067.00	(332.70) LT		
	11/15/11	200 000	31.527	6,305.38	6,134.00	(171.38) LT		
Total		300,000		9,705.08	9,201.00	(504.08) LT	228.00	2.47
Share Price: \$30.670; Rating: Morgan Stanley: 1, Citigroup: 2, S&P: 1, Next Dividend Payable 03/2013								
KRAFT FOODS GROUP INC COM (KRFT)	7/9/08	66 000	30.752	2,029.61	3,001.02	971.41 LT	132.00	4.39
Share Price: \$45.470; Rating: Morgan Stanley: 2, S&P: 2, Next Dividend Payable 07/14/13								
LAMAR ADVERTISING CO CL A (LAMR)	11/28/05	100 000	46.440	4,644.00	3,875.00	(769.00) LT		
	9/15/08	50 000	36.740	1,837.00	1,937.50	100.50 LT		
Total		150 000		6,481.00	5,812.50	(668.50) LT	--	--
Share Price: \$38.750; Rating: Morgan Stanley: 1, Citigroup: 2, S&P: 2								
LUXOTTICA GROUP SPA SPON ADR (LUX)	10/21/10	100 000	29.458	2,945.80	4,135.00	1,189.20 LT		
	11/15/11	150 000	28.946	4,341.83	6,202.50	1,860.67 LT		
Total		250,000		7,287.63	10,337.50	3,049.87 LT	153.75	1.48
Share Price: \$41.350								
MASTERCARD INC CL A (MA)	12/3/09	20 000	242.140	4,842.80	9,825.60	4,982.80 LT		
	10/21/10	10 000	246.610	2,466.10	4,912.80	2,446.70 LT		
Total		30 000		7,308.90	14,738.40	7,429.50 LT	36.00	0.24
Share Price: \$491.280; Rating: Citigroup: 1, S&P: 2, Next Dividend Payable 02/2013								
MERCK & CO INC NEW COM (MRK)	4/14/05	86 000	20.639	1,774.98	3,520.84	1,745.86 LT		
	9/15/08	200 000	33.723	6,744.65	8,188.00	1,443.35 LT		
Total		286 000		8,519.63	11,708.84	3,189.21 LT	491.92	4.20
Share Price: \$40.940; Rating: Morgan Stanley: 2, Citigroup: 2, S&P: 1, Next Dividend Payable 01/08/13								
MICROCHIP TECHNOLOGY INC (MCHP)	12/24/07	300 000	29.997	8,999.08	9,777.00	777.92 LT	422.40	4.32
Share Price: \$32.590; Rating: Citigroup: 2, S&P: 2, Next Dividend Payable 03/2013								

CONTINUED

Basic Securities Account
719,121,047.53
BARTON AND SHIRLEY WEISMAN FOU
BARTON WEISMAN, JR

H061000

STOCKS

COMMON STOCKS (CONTINUED)

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
MICROSOFT CORP (MSFT)	2/6/12	300 000	30 155	9,046.53	8,012.91	(1,033.62) ST	276.00	3.44
Share Price: \$26.710; Rating: Morgan Stanley 1, Citigroup 1, S&P: 1, Next Dividend Payable 03/2013								
MONDELEZ INTL INC COM (MDLZ)	7/9/08	200 000	18.962	3,792.41	5,090.64	1,298.23 LT	104.00	2.04
Share Price: \$25.453; Rating: Morgan Stanley 1, Citigroup: 1, S&P: 1, Next Dividend Payable 01/14/13								
NESTLE SPON ADR REP REG SHR (NSRGY)	9/9/09	100 000	41 750	4,175.00	6,517.00	2,342.00 LT	177.20	2.71
Share Price: \$65.170; Next Dividend Payable 05/2013								
NOVARTIS AG ADR (NVS)	3/10/06	100 000	55 480	5,548.00	6,330.00	782.00 LT		
	11/15/11	50 000	55.370	2,768.50	3,165.00	396.50 LT		
Total		150 000		8,316.50	9,495.00	1,178.50 LT	315.90	3.32
Share Price: \$63.300; Rating: S&P: 2, Next Dividend Payable 04/2013								
PEPSICO INC NC (PEP)	9/9/09	50 000	58 060	2,903.00	3,421.50	518.50 LT		
	10/21/10	50,000	55.330	3,266.50	3,421.50	155.00 LT		
	2/6/12	50 000	66 600	3,330.00	3,421.50	91.50 ST		
Total		150 000		9,499.50	10,264.50	673.50 LT 91.50 ST	322.50	3.14
Share Price: \$68.430; Rating: Morgan Stanley 1, Citigroup: 2, S&P: 1, Next Dividend Payable 01/02/13								
PROCTER & GAMBLE (PG)	9/9/09	50 000	53 970	2,698.50	3,394.50	696.00 LT		
	2/6/12	50,000	63 620	3,181.00	3,394.50	213.50 ST		
Total		100 000		5,879.50	6,789.00	696.00 LT 213.50 ST	224.80	3.31
Share Price: \$67.890; Rating: Morgan Stanley 2, Citigroup: 1, S&P: 2, Next Dividend Payable 02/2013								
QIAGEN NV ORD (QGEN)	10/21/10	200 000	18.777	3,755.40	3,629.96	(125.44) LT		
	11/15/11	300 000	14.267	4,280.01	5,444.94	1,164.93 LT		
	2/6/12	200 000	16.350	3,270.00	3,629.96	359.96 ST		
Total		700 000		11,305.41	12,704.86	1,039.49 LT 359.96 ST	—	—
Share Price: \$18.150; Rating: S&P: 1								
QUALCOMM INC (QCOM)	2/11/05	50 000	36 240	1,812.00	3,092.98	1,280.98 LT		
	4/14/05	50 000	32 945	1,647.26	3,092.98	1,445.72 LT		
	2/6/12	50 000	61 120	3,056.00	3,092.98	36.98 ST		
Total		150 000		6,515.26	9,278.94	2,726.70 LT 36.98 ST	150.00	1.61
Share Price: \$61.860; Rating: Morgan Stanley 1, Citigroup 1, S&P: 1, Next Dividend Payable 03/2013								

CONTINUED

Holdings

Basic Securities Account
719-121047-358
BARTON AND SHIRLEY WEISMAN FDD
BARTON WEISMAN DL

STOCKS

COMMON STOCKS (CONTINUED)

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
SOUTHWEST AIRLINES (LUV)								
	6/6/07	300 000	14.170	4,251.00	3,072.00	(1,179.00) LT		
	12/24/07	300 000	13 050	3,915.00	3,072.00	(843.00) LT		
	9/9/09	200 000	8 788	1,757 68	2,048.00	290.32 LT		
	11/15/11	200 000	8,237	1,647.38	2,048.00	400 62 LT		
Total		1,000 000		11,571 06	10,240.00	(1,331 06) LT	40 00	0 39
Share Price: \$10.240; Rating: Morgan Stanley: 2, S&P: 1, Next Dividend Payable 01/03/13								
STERICYCLE INC (SRCL)	12/3/09	50 000	56.350	2,817 50	4,664.00	1,846.50 LT	—	—
Share Price: \$93.280; Rating: Morgan Stanley: 2, S&P: 1								
THOMSON REUTERS CORP (TRI)	11/15/11	200 000	29.313	5,862.60	5,812 00	(50 60) LT		
	2/6/12	200 000	27 530	5,506.00	5,812.00	306 00 ST		
Total		400 000		11,368.60	11,624.00	(50.60) LT	512 00	4 40
Share Price: \$29.060; Rating: Morgan Stanley: 2, Citigroup: 1, S&P: 2, Next Dividend Payable 03/2013								
TIME WARNER INC NEW (TWX)	2/11/05	66 400	38.638	2,565 54	3,175.91	610.37 LT		
	7/9/08	99 600	29 865	2,974.59	4,763.87	1,789 28 LT		
	9/9/09	34 000	26 795	911 03	1,626.22	715 19 LT		
Total		200 000		6,451 16	9,566.00	3,114 84 LT	208 00	2 17
Share Price: \$47.830; Rating: Morgan Stanley: 2, Citigroup: 1, S&P: 1, Next Dividend Payable 03/2013								
UNITED CONTINENTAL HLDGS INC (UAL)	10/21/10	100 000	28.430	2,843.00	2,338.00	(505.00) LT		
	11/15/11	400 000	17 992	7,196 60	9,352 00	2,155 40 LT		
Total		500 000		10,039.60	11,690.00	1,650 40 LT	—	—
Share Price: \$23.380; Rating: Morgan Stanley: 1, S&P: 2								
VERIZON COMMUNICATIONS (VZ)	2/11/05	100 000	33.305	3,330 49	4,327 00	996 51 LT		
	11/28/05	100 000	29.427	2,942.74	4,327.00	1,384.26 LT		
	10/21/10	100 000	32 637	3,263 70	4,327 00	1,063 30 LT		
Total		300 000		9,536.93	12,981.00	3,444 07 LT	618 00	4 76
Share Price: \$43.270; Rating: Morgan Stanley: 2, Citigroup: 2, S&P: 2, Next Dividend Payable 02/2013								
VISA INC CL A (V)	9/9/09	50 000	72 790	3,639.50	7,579 00	3,939.50 LT		
	10/21/10	50 000	80 590	4,029.50	7,579.00	3,549 50 LT		
Total		100 000		7,669.00	15,158.00	7,489 00 LT	132 00	0 87
Share Price: \$151.580; Rating: Citigroup: 2, S&P: 2, Next Dividend Payable 03/2013								

CONTINUED

Holdings
Basic Securities Account
719.123147.938
BARTON AND SHIRLEY WEISMAN FOU
BARTON WEISMAN, DI

STOCKS

COMMON STOCKS (CONTINUED)

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
VODAFONE GP PLC ADS NEW (VOD)	6/20/05	25 000	28.994	724.86	629.75	(95.11) LT		
	11/28/05	175 000	24.932	4,363.02	4,408.25	45.23 LT		
	9/15/08	100 000	23.408	2,340.78	2,519.00	178.22 LT		
Total		300,000		7,428.66	7,557.00	128.34 LT	450.00	5.95
Share Price: \$25.190; Rating: S&P: 1, Next Dividend Payable 02/06/13								
WALT DISNEY CO HLDG CO (DIS)	4/14/05	50 000	27.917	1,395.85	2,489.50	1,093.65 LT		
	11/28/05	200 000	24.685	4,937.08	9,958.00	5,020.92 LT		
Total		250 000		6,332.93	12,447.50	6,114.57 LT	187.50	1.50
Share Price: \$49.790; Rating: Morgan Stanley, 1, Citigroup: 1, S&P: 1, Next Dividend Payable 12/20/13								
YUM BRANDS INC (YUM)	2/6/12	100 000	63.207	6,320.69	6,640.00	319.31 ST	134.00	2.01
Share Price: \$66.400; Rating: Morgan Stanley, 1, Citigroup: 2, S&P: 1, Next Dividend Payable 02/20/13								

STOCKS

	Percentage of Assets %	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Yield %
	97.1%	\$484,323.52	\$563,844.42	\$76,968.71 LT	\$11,433.97	2.03%
				\$2,552.19 ST	\$0.00	
TOTAL MARKET VALUE		\$484,323.52	\$580,592.61	\$76,968.71 LT	\$11,435.64	1.97%
	100.0%			\$2,552.19 ST	\$0.00	

TOTAL VALUE (includes accrued interest)

\$580,592.61

1 - This information reflects your requested adjustments to the transaction details

Unrealized Gain/(Loss) totals only reflect positions that have cost basis and/or market value information available. Cash, MMF, Deposits and positions stating 'Please Provide' are not included

Statement 6 - Form 990-PF, Part III, Line 5 - Other Decreases

<u>Description</u>	<u>Amount</u>
ADJUST STOCK BASIS TO ACTUAL	\$ <u>100,073</u>
TOTAL	\$ <u><u>100,073</u></u>

Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000

<u>Name of Manager</u>	<u>Amount</u>
BARTON WEISMAN	\$ <u>307,550</u>
TOTAL	\$ <u><u>307,550</u></u>

Federal Statements

Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year

Name		Address		Relationship	Status	Purpose	Amount
Address							
ADOLPH & ROSE LEVIS JCC BOCA RATON FL 33428		9801 DONNA KLEIN BLVD				COMMUNITY SERVICES	10,500
AMERICAN FRIENDS OF MAGEN DAVID ADO NEW YORK NY 10001		352 SEVENTH AVE				PROVIDE EMERGENCY MEDICAL RESPONSE	10,000
BOCA RATION REGIONAL HOSPITAL FOUND BOCA RATON FL 33486		800 MEADOWS ROAD				MEDICAL SERVICES	2,000
BROWARD CENTER FOR PERFORMING ARTS FORT LAUDERDALE FL 33312	N/A	201 SW 5TH AVE PUBLIC				SECURE FUTURE OF PERFORMING ARTS	2,500
CONGREGATION B'NAI ISRAEL BOCA RATON FL 33431	N/A	2200 YAMATO RD PUBLIC				GENERAL	10,400
DANIEL D CANTOR SENIOR CENTER SUNRISE FL 33351		5000 N NOB HILL RD				SENIOR SERVICES	2,500
HADASSAH NEW YORK NY 10019	N/A	50 WEST 58TH ST PUBLIC				EDUCATION & MEDICAL ASSISTANCE	2,000
HANDS ON TZEDAKAH BOCA RATON FL 33496	N/A	2901 CLINT MOORE ROAD PUBLIC				SUPPORT LIFE SUSTAINING PROGRAMS	11,450
JARC ENDOWMENT FUND BOCA RATON FL 33428		21160 95TH AVENUE SOUTH				HELPING DEVELOPMENTALLY DISABLED	1,800
JCC OF NJ SCOTCH PLANES NJ 07076	NA	1391 MARTINE AVE PUBLIC				COMMUNITY SUPPORT	400
JEWISH ADOPTION & FOSTER CARE OPTIO SUNRISE FL 33351		4200 N UNIVERSITY DRIVE				ADOPTION & FOSTER CARE SERVICES	10,000
JEWISH FEDERATION OF ATLANTIC AND C MARGATE NJ 08402	NA	501 NORTH JEROME AVENUE PUBLIC				JEWISH COMMUNITY PHILANTHROPY	500
NATIONAL PARKINSON FOUNDATION MIAMI FL 33136	NA	1501 NW 9TH AVE PUBLIC				RESEARCH	5,000
NEW JERSEY PPC TF VOORHEES NJ 08043	N/A	1304 LAUREL OAK ROAD PUBLIC				MEDICAL ASSISTANCE TO CHILDREN	5,000
PLAY FOR PINK NEW YORK NY 10022		60 EAST 56TH STREET 8TH F CANCER RESEARCH					500
RUTH RALES JEWISH FAMILY BOCA RATON FL 33428	N/A	21300 RUTH & BARON COLEMA PUBLIC				FOOD, FINANCIAL & SENIOR ASSISTANCE	220,000
TEMPLE BAT YAM FT LAUDERDALE FL 33334	N/A	5151 NE 14TH TERRACE PUBLIC				GENERAL	5,660
TRUSTEES OF UNIVERSITY OF PENN PHILADELPHIA PA 19104	N/A	3451 WALNUT STREET PUBLIC				EDUCATIONAL	1,000
US HOLOCAUST MEMORIAL MUSEUM WASHINGTON DC 20024	N/A	100 RAOUL WALLENBERG PLAC PUBLIC				PROVIDE KNOWLEDGE ON HOLOCAUST	6,000

Federal Statements

Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)

Name		Address			
Address	Relationship	Status	Purpose	Amount	
TOTAL					307,210

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No 1545-1709

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

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

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

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

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

A corporation required to file Form 990-T and requesting an automatic 6-month extension – check this box and complete

Part I only ☐

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

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions. BARTON AND SHIRLEY WEISMAN FOUNDATION, INC.	Employer identification number (EIN) or 58-2684069
	Number, street, and room or suite no. If a P.O. box, see instructions. 17603 LAKE ESTATES DRIVE	Social security number (SSN)
File by the due date for filing your return. See instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions. BOCA RATON FL 33496	

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

04

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

**SHIRLEY WEISMAN
17603 LAKE ESTATES DR.**

- The books are in the care of ► **BOCA RATON**

FL 33496

Telephone No ►

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.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **08/15/13**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
► ☒ calendar year **2012** or

► ☐ tax year beginning _____, and ending _____

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	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.	3b	\$	0
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0

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

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2013)

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

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 File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. BARTON AND SHIRLEY WEISMAN FOUNDATION, INC.	Employer identification number (EIN) or 58-2684069
	Number, street, and room or suite no. If a P.O. box, see instructions. 17603 LAKE ESTATES DRIVE	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. BOCA RATON FL 33496	

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

04

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

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

SHIRLEY WEISMAN
17603 LAKE ESTATES DR.

- The books are in the care of **BOCA RATON**

FL 33496

Telephone No. ☐

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 **11/15/13**.

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 REQUESTED TO GATHER INFORMATION TO PREPARE 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	\$	7,800
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	\$	7,800
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 **CPA**

Date **7/30/13**

Form 8868 (Rev 1-2013)