Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0047

2012

Open to Public Inspection

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

B Check if applicable
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Terminated
- ☐ Amended return
- ☐ Application pending

C Name of organization
SARASOTA-MANATEE JEWISH FEDERATION INC

Doing Business As

Number and street (or P O box if mail is not delivered to street address) | Room/suite
580 S MCINTOSH ROAD

City or town, state or country, and ZIP + 4
SARASOTA, FL 34232

D Employer identification number
59-1227747

E Telephone number
(941) 371-4546

G Gross receipts $ 5,636,997

F Name and address of principal officer
HOWARD TEVLOWITZ
580 S MCINTOSH ROAD
SARASOTA, FL 34232

H(a) Is this a group return for affiliates? ☐ Yes ☑ No

H(b) Are all affiliates included? ☐ Yes ☐ No
If "No," attach a list (see instructions)

H(c) Group exemption number ▶

I Tax-exempt status ☑ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

J **Website: ▶** WWW SMJF ORG

K Form of organization ☑ Corporation ☐ Trust ☐ Association ☐ Other ▶ | L Year of formation 1970 | M State of legal domicile FL

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities
THE SARASOTA-MANATEE JEWISH FEDERATION AWARDS GRANTS, MAKES ALLOCATIONS, AND ENGAGES IN PARTNERSHIPS WHICH SUPPORT HUMAN, SOCIAL SERVICE AND RELIGIOUS ACTIVITIES, AND EDUCATIONAL PROGRAMMING, LOCALLY AND WORLDWIDE THE FEDERATION FOCUSES ON JEWISH CONTINUITY(SUSTAINING AND ENRICHING OUR JEWISH COMMUNITY AND CREATING THE NEXT GENERATION OF JEWS), SAFETY NET (ENSURING THAT BASIC NEEDS SUCH AS FOOD AND SHELTER ARE MET, AND WORKING FOR THE SOCIAL, EMOTIONAL AND FINANCIAL WELL-BEING OF JEWS EVERYWHERE), AND BUILDING JEWISH COMMUNITY (ENABLING JEWS OF ALL AGES AND LEVELS OF AFFILIATION, THROUGH PROGRAMS AND SERVICES, TO LEAD COMMITTED JEWISH LIVES)

2 Check this box ▶☐ if the organization discontinued its operations or disposed of more than 25% of its net assets

3	Number of voting members of the governing body (Part VI, line 1a)	3	48
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	48
5	Total number of individuals employed in calendar year 2012 (Part V, line 2a)	5	26
6	Total number of volunteers (estimate if necessary)	6	263
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	197,959
b	Net unrelated business taxable income from Form 990-T, line 34	7b	0

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)	3,688,474	3,225,750
	9	Program service revenue (Part VIII, line 2g)	204,663	427,304
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	29,884	69,352
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	240,799	364,103
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	4,163,820	4,086,509
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	1,052,580	2,120,646
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	749,649	1,290,364
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	77,811	115,660
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶327,121		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	551,296	1,270,797
	18	Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	2,431,336	4,797,467
	19	Revenue less expenses Subtract line 18 from line 12	1,732,484	-710,958

			Beginning of Current Year	End of Year
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	22,682,617	22,871,909
	21	Total liabilities (Part X, line 26)	1,374,294	1,116,355
	22	Net assets or fund balances Subtract line 21 from line 20	21,308,323	21,755,554

Part II Signature Block

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 officer) is based on all information of which preparer has any knowledge

Sign Here

****** | 2013-08-07
Signature of officer | Date

HOWARD TEVLOWITZ EXECUTIVE DIRECTOR
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
REBECCA U STONER				P00585910

Firm's name ▶ KERKERING BARBERIO & CO | Firm's EIN ▶ 59-1753337

Firm's address ▶ PO BOX 49348
SARASOTA, FL 342306348 | Phone no (941) 365-4617

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

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response to any question in this Part III . . . . ☑

1 Briefly describe the organization's mission

ENSURE THE CONTINUITY OF THE JEWISH PEOPLE, ENHANCE THE QUALITY OF JEWISH LIFE AND BUILD A STRONG, SECURE AND UNIFIED JEWISH COMMUNITY IN SARASOTA-MANATEE, IN ISRAEL AND THROUGHOUT THE WORLD THE FEDERATION ADVANCES THIS MISSION WITH ITS PARTNER NETWORK BY 1 MEETING THE HUMAN NEEDS OF THE SARASOTA-MANATEE JEWISH COMMUNITY AND OF FELLOW JEWS WORLD-WIDE,2 PROMOTING A POSITIVE JEWISH IDENTITY,3 SUPPORTING ISRAEL,4 INVOLVING AND BUILDING COMMUNITY AMONG THE JEWS OF SARASOTA-MANATEE,5 STRENGTHENING TIES BETWEEN THE SARASOTA-MANATEE JEWISH COMMUNITY AND THE BROADER SOCIETY IN WHICH IT EXISTS

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? . . . . ☐ **Yes** ☑ **No**

If "Yes," describe these new services on Schedule O

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? . . . . ☐ **Yes** ☑ **No**

If "Yes," describe these changes on Schedule O

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a (Code) (Expenses $ 1,453,021 including grants of $ 523,707) (Revenue $ 287,914)

ISRAEL, OVERSEAS, ADVOCACY AND COMMUNITY RELATIONS THE FEDERATION WORKS TO ADDRESS HUMAN AND EDUCATIONAL NEEDS IN ISRAEL, THE FORMER SOVIET UNION, POLAND AND NEARLY 60 COUNTRIES AROUND THE WORLD LOCALLY, THE FEDERATION CONDUCTS OUTREACH WITHIN THE JEWISH AND GENERAL COMMUNITIES, FOSTERING ISRAEL EDUCATION AND AWARENESS AND PROVIDES A FORUM FOR DEALING WITH ANTI-SEMITISM EXAMPLES OF SPECIFIC PROGRAMS FUNDED INCLUDE 1 YOUTH FUTURES THE SARASOTA-MANATEE JEWISH FEDERATION SUPPORTS THE JEWISH AGENCY FOR ISRAEL'S YOUTH FUTURES PROGRAM, WHICH EMPOWERS CHILDREN AND YOUTH FROM DISADVANTAGED REGIONS TO REALIZE THEIR POTENTIAL BY ENRICHING THEIR LIVES EDUCATIONALLY, CULTURALLY AND SOCIALLY THROUGH PERSONALIZED INTERVENTION, MENTORSHIP AND CRISIS MANAGEMENT YOUTH FUTURES INTRODUCES A PERSONAL MENTOR (TRUSTEE) INTO THE LIVES OF THESE CHILDREN THESE TRUSTEES UNDERGO TRAINING TO ASSIST THEM WITH THEIR TASK OF ASSESSING THE CHILDREN THEY ARE ASSIGNED TO, AND TAILORING AN INTERVENTION PLAN FOR EACH CHILD 2 WINGS THE SARASOTA-MANATEE JEWISH FEDERATION SUPPORTS WINGS PROGRAM, WHICH PROVIDES GUIDANCE AND SUPPORT TO LONE SOLDIERS WHO HAVE RECENTLY IMMIGRATED TO ISRAEL AND ARE NEARING THE CONCLUSION OF THEIR SERVICE IN THE ISRAELI DEFENSE FORCES THE PROGRAM PROVIDES A 5-DAY PRE-DISCHARGE SEMINAR FOR SOLDIERS, EDUCATING THEM IN FINANCIAL MANAGEMENT AND ENTRY INTO THE JOB MARKET, AS WELL AS ONGOING INDIVIDUAL PERSONAL, PROFESSIONAL AND FINANCIAL COUNSELING FOR UP TO 2 YEARS AFTER COMPLETION OF MILITARY SERVICE 3 ISRAEL TENNIS CENTER THE ISRAEL TENNIS CENTER IS THE LARGEST TENNIS PROGRAM FOR CHILDREN IN THE WORLD IT OPERATES 14 CENTERS, LOCATED PRIMARILY IN UNDERPRIVILEGED COMMUNITIES, USING TENNIS TO PROMOTE THE SOCIAL, PHYSICAL AND PSYCHOLOGICAL WELL-BEING OF THEIR STUDENTS THE SARASOTA-MANATEE JEWISH FEDERATION, IN PARTNERSHIP WITH THE MARCI LYNN BERNSTEIN PHILANTHROPIC FUND OF THE UNITED JEWISH FEDERATION FOUNDATION OF GREATER PITTSBURGH, SUPPORTS THE CENTER'S COUPLES COEXISTENCE PROGRAM, WHERE ARAB AND JEWISH CHILDREN WORK TOGETHER TO LEARN THE VALUES OF TOLERANCE AND COOPERATION THROUGH SPORTS AND FITNESS TRAINING 4 THE HELLER ISRAEL ADVOCACY INITIATIVE ADVOCATES FOR PEACE AND SECURITY IN ISRAEL THROUGH EDUCATION, INFORMATION AND COMMUNITY AWARENESS, RAISING CONSCIOUSNESS OF, AND ACTIVELY CONFRONTING ANTI-SEMITISM ON A GLOBAL LEVEL, AND, DIRECTLY ADDRESSING ANTI-ISRAEL ACTIVITIES IN SARASOTA-MANATEE

4b (Code) (Expenses $ 1,768,292 including grants of $ 567,350) (Revenue $ 129,779)

JEWISH EDUCATION AND PROGRAMMING THE FEDERATION, IN COOPERATION WITH AREA SYNAGOGUES AND ORGANIZATIONS, OFFERS A RANGE OF INSPIRING OPPORTUNITIES THAT ENABLE TEENAGERS, ADULTS AND FAMILIES TO BECOME CONFIDENT AND COMFORTABLE LIFELONG JEWISH LEARNERS THE FEDERATION PROVIDES A WIDE RANGE OF JEWISH PROGRAMS THROUGHOUT THE TWO-COUNTY AREA THIS CATEGORY INCLUDES PROGRAMS CELEBRATING JEWISH HOLIDAYS, OUTREACH EFFORTS TO THE UNAFFILIATED AND ADULT PROGRAMS FOR ALL AGES AND INTERESTS EXAMPLES OF SPECIFIC PROGRAMS FUNDED INCLUDE 1 FEDERATION-SPONSORED COMMUNITY-WIDE EDUCATIONAL PROGRAMS ENSURE A STRONG JEWISH IDENTITY AND TO HELP BUILD A DYNAMIC AND ENGAGED JEWISH COMMUNITY FOR GENERATIONS TO COME PROGRAMS FEATURE SPEAKERS ON A WIDE VARIETY OF TOPICS 2 THE FEDERATION'S PJ LIBRARY PROGRAM HAS ENABLED OVER 215 FAMILIES WITH CHILDREN AGES 6 MONTHS TO 8 YEARS TO RECEIVE A MONTHLY MAILING OF JEWISH CHILDREN'S BOOKS, CDS, OR THE OCCASIONAL PARENT BOOK, FOR ONE YEAR EACH BOOK AND CD CAME WITH GUIDES TO HELP FAMILIES USE THE SELECTION IN THEIR HOMES BOOK AND MUSIC LISTS WERE CHOSEN BY THE FOREMOST EARLY-CHILDHOOD EXPERTS THE LIST INCLUDES THEMES SUCH AS JEWISH HOLIDAYS, FOLKTALES AND JEWISH FAMILY LIFE 3 THE FEDERATION'S CULTURAL ARTS PROGRAMS, SUCH AS THE JEWISH FILM FESTIVAL AND THE JEWISH BOOK FESTIVAL, PROVIDE EVENTS FOR THE ENTIRE COMMUNITY ON TOPICS THAT APPEAL TO A BROAD RANGE OF INTERESTS, AGES AND POINTS OF VIEW 4 THE FEDERATION HONORS ITS COMMITMENT TO HOLOCAUST EDUCATION THROUGH THE GENERATIONS AFTER GROUP, AN ORGANIZATION OF DESCENDANTS OF HOLOCAUST SURVIVORS WHO WISH TO EDUCATE THIS AND FUTURE GENERATIONS BY PRESERVING THE MEMORIES OF THE PAST, A SPEAKERS BUREAU TO ADDRESS ISSUES PERTAINING TO HOLOCAUST EDUCATION, THE ANNUAL HOLOCAUST SURVIVORS LUNCHEON, FEDERATION-SPONSORED HOLOCAUST EDUCATION PROGRAMS THROUGHOUT THE COMMUNITY, INCLUDING AN ANNUAL EVENT IN PARTNERSHIP WITH THE UNITED STATES HOLOCAUST MUSEUM, AND THE ANNUAL YOM HASHOAH HOLOCAUST REMEMBRANCE DAY PROGRAM 5 JEWISH SUMMER CAMP INCENTIVE GRANTS STUDIES HAVE PROVEN, OVERWHELMINGLY, THAT JEWISH CAMPING EXPERIENCES SERVE AS A CRITICAL TOOL IN JEWISH CONTINUITY EFFORTS IN AN EFFORT TO ENCOURAGE AREA FAMILIES TO SEND THEIR CHILDREN TO JEWISH CAMPS, THE SARASOTA-MANATEE JEWISH FEDERATION WITH THE FINANCIAL ASSISTANCE GENEROUS AREA DONORS AWARDED $50,000 IN INCENTIVE GRANTS IN 2012 WITH THE FINANCIAL ASSISTANCE OF THE FEDERATION, 70 CHILDREN FROM SARASOTA-MANATEE ATTENDED JEWISH OVERNIGHT CAMPS SUCH AS CAMP RAMAH DAROM, CAMP BARNEY MEDINTZ, CAMP GAN ISRAEL, CAMP COLEMAN, EMMA KAUFMANN AND CAMP AVODA IN ADDITION, ANOTHER $8,850 WAS AWARDED TO 59 CAMPERS ATTENDING AREA JEWISH DAY CAMPS AT LOCAL SYNAGOGUES 6 NASHIM L'TOVA, FEDERATIONS WOMENS OUTREACH GROUP, OFFERS PROGRAMS SPECIFICALLY GEARED TOWARD WOMEN, INCLUDING THE ANNUAL WOMENS DAY, THE WOMENS PASSOVER CELEBRATION, AND NEWCOMER PROGRAMS 7 THE FEDERATION PROVIDES FUNDING AND PROFESSIONAL SUPPORT FOR HILLEL PROGRAMS ON LOCAL COLLEGE CAMPUSES

4c (Code) (Expenses $ 883,009 including grants of $ 864,968) (Revenue $ 9,933)

SARASOTA-MANATEE JEWISH SAFETY NET PROGRAMS THE FEDERATION WORKS TO ENSURE THAT BASIC NEEDS SUCH AS FOOD AND SHELTER ARE MET, AS WE WORK FOR THE SOCIAL, EMOTIONAL AND FINANCIAL WELL-BEING OF JEWS IN SARASOTA-MANATEE EXAMPLES OF SPECIFIC PROGRAMS FUNDED INCLUDE 1 JEWISH HEALING PROGRAM THE FEDERATION PROVIDES A SIGNIFICANT PORTION OF THE FUNDING FOR THE JEWISH HEALING PROGRAM, WHICH IS IMPLEMENTED BY JFCS IN 2012, 350 VOLUNTEERS EACH MONTH PROVIDED DIRECT COMMUNITY SERVICES TO THE JEWISH COMMUNITY, INCLUDING BIKKOR CHOLIM (VISIT THE SICK), BEREAVEMENT SERVICES, COMMUNITY RELIGIOUS OUTREACH (TO SENIORS IN NURSING HOMES AND ASSISTED LIVING FACILITIES),PRISON MINISTRY AND DOULA (END-OF-LIFE) SERVICES MORE THAN 4,990 CONTACTS WERE MADE WITH THE JEWISH COMMUNITY, HELPING THE MOST AT-RISK AND ISOLATED TO RECEIVE SPIRITUAL GUIDANCE AND MUCH-NEEDED HUMAN CONTACT 2 DRESS UP FOR YONTIF IN 2012, THE FEDERATION SPONSORED AND IMPLEMENTED THE DRESS UP FOR YONTIF PROGRAM, DURING THE HIGH HOLIDAYS (ROSH HASHANAH AND YOM KIPPUR) AND PASSOVER PARTICIPANTS INCLUDED SENIORS PARTICIPATING IN THE JFCS "SENIOR OUTREACH SERVICES" PROGRAM, RESIDENTS OF KOBERNICK HOUSE (ASSISTED LIVING) AND ANCHIN PAVILION (NURSING HOME), AND RUSSIAN FAMILIES THE PROGRAM INCLUDES RELIGIOUS SERVICES AND PARTICIPANTS RECEIVE GIFT CARDS FOR CUSTOMARY HOLIDAY FOODS, SUCH AS MATZO FOR PASSOVER 3 COMMUNITY EMERGENCY ASSISTANCE FUND THE FEDERATION PROVIDES EMERGENCY FUNDING FOR LOCAL JEWISH FAMILIES IN NEED FOR RENT, UTILITIES AND FOOD THE PROGRAM IS ADMINISTERED THROUGH JEWISH FAMILY AND CHILDREN'S SERVICE 4 CARING FOR THE JEWISH ELDERLY THE FEDERATION PROVIDES BASIC HUMAN NEEDS SUCH AS FOOD, MEDICINES AND HOME CARE FOR THOUSANDS OF ELDERLY JEWS IN THE FORMER SOVIET UNION RECEIVE THROUGH THE JEWISH JOINT DISTRIBUTION COMMITTEE 5 EDUCATIONAL INTERVENTION PROGRAM THE FEDERATION PROVIDES FUNDING FOR DIAGNOSTIC TESTING TO GUARANTEE THAT SEVERELY ABUSED AND NEGLECTED CHILDREN IN ISRAEL RECEIVED THE SERVICES THAT MEET WITH THEIR INDIVIDUAL EDUCATIONAL NEEDS THROUGH A PARTNERSHIP WITH ORR SHALOM, DOZENS OF CHILDREN RECEIVE TESTING AND REMEDIAL TEACHING, WHERE NECESSARY

(Code) (Expenses $ 164,621 including grants of $ 164,621) (Revenue $)

COLLABORATIVE PARTNERSHIPS THE FEDERATION WORKS WITH A WIDE RANGE OF COMMUNITY PARTNERS TO SUPPORT JEWISH-THEMED PROGRAMMING FOR THE ENTIRE COMMUNITY EXAMPLES OF SPECIFIC PROGRAMS FUNDED INCLUDE 1 VAN WEZEL PERFORMING ARTS HALL THE FEDERATION SPONSORED THE PERFORMANCE OF A JEW GROWS IN BROOKLYN, A BROADWAY HIT WHICH CHRONICLES THE LIFE OF PERFORMER JAKE EHRENREICH FROM THE STREETS OF BROOKLYN TO HIS ROCK-AND-ROLL DAYS TO THE MUSICAL STAGES OF THE CATSKILLS AND BROADWAY 2 SARASOTA FILM FESTIVAL THROUGH ITS COLLABORATION WITH THE SARASOTA FILM FESTIVAL, THE FEDERATION SPONSORED A SHOWCASE OF SIX JEWISH OR ISRAELI THEMED FILMS AS PART OF THE 2012 FESTIVAL IN ADDITION, THE SARASOTA FILM FESTIVAL ASSISTED OUR FEDERATION IN SELECTED FILMS FOR OUR THIRD ANNUAL JEWISH FILM FESTIVAL HELD THIS YEAR 3 EMBRACING OUR DIFFERENCES THE FEDERATION PARTNERS WITH COEXISTENCE, INC EACH YEAR TO PRESENT THIS INTERNATIONAL OUTDOOR ART EXHIBIT THE EXHIBIT PROMOTES THE VALUE OF DIVERSITY, THE BENEFIT OF INCLUSION AND THE SIGNIFICANCE OF THE ACTIVE REJECTION OF HATRED AND PREJUDICE PUBLIC SCHOOL CHILDREN, GRADES K-12, ARE TRANSPORTED TO THE EXHIBIT FOR FREE EACH YEAR SINCE 2004, MORE THAN 1,350,000 HAVE BENEFITTED FROM THIS FREE EDUCATIONAL PROGRAM 4 MOTE MARINE LABORATORY THE FEDERATION PARTNERED WITH MOTE MARINE TO FUND THREE ISRAELI SCIENTISTS VISIT TO SARASOTA TO PERFORM SHARK RESEARCH AND MONITORING RELATING TO THE SPECIES/ECO-SYSTEM, BALANCE, OCEAN ACIDIFICATION AND ITS IMPACT ON CORAL REEF SYSTEMS AND SUSTAINABLE AQUACULTURE

4d Other program services (Describe in Schedule O)

(Expenses $ 164,621 including grants of $ 164,621) (Revenue $)

4e **Total program service expenses** ▶ 4,268,943

Part IV Checklist of Required Schedules

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A*	1	Yes	
2	Is the organization required to complete *Schedule B, Schedule of Contributors* (see instructions)?	2	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I*	3		No
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4		No
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? *If "Yes," complete Schedule C, Part III*	5		No
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D, Part I*	6	Yes	
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II*	7		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8		No
9	Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV*	9		No
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? *If "Yes," complete Schedule D, Part V*	10	Yes	
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D, Part VI.*	11a	Yes	
b	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII*	11b	Yes	
c	Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VIII*	11c		No
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX*	11d		No
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e	Yes	
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X*	11f	Yes	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a	Yes	
b	Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional*	12b		No
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		No
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		No
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV*	14b	Yes	
15	Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or assistance to any organization or entity located outside the United States? *If "Yes," complete Schedule F, Parts II and IV*	15		No
16	Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or assistance to individuals located outside the United States? *If "Yes," complete Schedule F, Parts III and IV*	16		No
17	Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I (see instructions)*	17	Yes	
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18	Yes	
19	Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III*	19		No
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		No
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		

Part IV Checklist of Required Schedules *(continued)*

		Line	Yes	No
21	Did the organization report more than $5,000 of grants and other assistance to any government or organization in the United States on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II*	21	Yes	
22	Did the organization report more than $5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? *If "Yes," complete Schedule I, Parts I and III*	22	Yes	
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? *If "Yes," complete Schedule J*	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? *If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25*	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	**Section 501(c)(3) and 501(c)(4) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L, Part I*	25a		No
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? *If "Yes," complete Schedule L, Part I*	25b		No
26	Was a loan to or by a current or former officer, director, trustee, key employee, highest compensated employee, or disqualified person outstanding as of the end of the organization's tax year? *If "Yes," complete Schedule L, Part II*	26		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? *If "Yes," complete Schedule L, Part III*	27		No
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
a	A current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	28a		No
b	A family member of a current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	28b		No
c	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? *If "Yes," complete Schedule L, Part IV*	28c		No
29	Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M*	29	Yes	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II*	32		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301 7701-2 and 301 7701-3? *If "Yes," complete Schedule R, Part I*	33		No
34	Was the organization related to any tax-exempt or taxable entity? *If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1*	34		No
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		No
b	If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? *If "Yes," complete Schedule R, Part V, line 2*	35b		
36	**Section 501(c)(3) organizations.** Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2*	36		No
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? *If "Yes," complete Schedule R, Part VI*	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? **Note.** All Form 990 filers are required to complete Schedule O	38	Yes	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response to any question in this Part V . . . . ☐

					Yes	No
1a	Enter the number reported in Box 3 of Form 1096 Enter -0- if not applicable	**1a**	33			
b	Enter the number of Forms W-2G included in line 1a *Enter -0-* if not applicable	**1b**	0			
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			**1c**	Yes	
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	**2a**	26			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? **Note.** If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)			**2b**	Yes	
3a	Did the organization have unrelated business gross income of $1,000 or more during the year?			**3a**	Yes	
b	If "Yes," has it filed a Form 990-T for this year? *If "No," provide an explanation in Schedule O*			**3b**	Yes	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?			**4a**		No
b	If "Yes," enter the name of the foreign country ▶ See instructions for filing requirements for Form TD F 90-22 1, Report of Foreign Bank and Financial Accounts					
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?			**5a**		No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			**5b**		No
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?			**5c**		
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?			**6a**		No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			**6b**		
7	**Organizations that may receive deductible contributions under section 170(c).**					
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?			**7a**	Yes	
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?			**7b**	Yes	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			**7c**		No
d	If "Yes," indicate the number of Forms 8282 filed during the year	**7d**				
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			**7e**		No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			**7f**		No
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?			**7g**		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?			**7h**		
8	**Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.** Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?			**8**		No
9	**Sponsoring organizations maintaining donor advised funds.**					
a	Did the organization make any taxable distributions under section 4966?			**9a**		No
b	Did the organization make a distribution to a donor, donor advisor, or related person?			**9b**		No
10	**Section 501(c)(7) organizations.** Enter					
a	Initiation fees and capital contributions included on Part VIII, line 12	**10a**				
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	**10b**				
11	**Section 501(c)(12) organizations.** Enter					
a	Gross income from members or shareholders	**11a**				
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	**11b**				
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?			**12a**		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	**12b**				
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**					
a	Is the organization licensed to issue qualified health plans in more than one state? **Note.** See the instructions for additional information the organization must report on Schedule O			**13a**		
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	**13b**				
c	Enter the amount of reserves on hand	**13c**				
14a	Did the organization receive any payments for indoor tanning services during the tax year?			**14a**		No
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O*			**14b**		

Part VI **Governance, Management, and Disclosure** *For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.*

Check if Schedule O contains a response to any question in this Part VI . . . ☑

Section A. Governing Body and Management

				Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year	1a	48		
	If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O				
b	Enter the number of voting members included in line 1a, above, who are independent	1b	48		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2		Yes	
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3			No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		Yes	
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5			No
6	Did the organization have members or stockholders?	6		Yes	
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a		Yes	
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b			No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following				
a	The governing body?	8a		Yes	
b	Each committee with authority to act on behalf of the governing body?	8b		Yes	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses in Schedule O*	9			No

Section B. Policies (*This Section B requests information about policies not required by the Internal Revenue Code.*)

		Line	Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a		No
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	Yes	
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990			
12a	Did the organization have a written conflict of interest policy? *If "No," go to line 13*	12a	Yes	
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe in Schedule O how this was done*	12c	Yes	
13	Did the organization have a written whistleblower policy?	13	Yes	
14	Did the organization have a written document retention and destruction policy?	14	Yes	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	15a	Yes	
b	Other officers or key employees of the organization	15b	Yes	
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions)			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		No
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure

17 List the States with which a copy of this Form 990 is required to be filed ▶FL

18 Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection Indicate how you made these available Check all that apply

☑ Own website ☑ Another's website ☑ Upon request ☐ Other (explain in Schedule O)

19 Describe in Schedule O whether (and if so, how), the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization ▶INNA SIDEMAN 580 S MCINTOSH ROAD SARASOTA, FL (941) 371-4546

Part VII **Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response to any question in this Part VII . . . . ☐

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed Report compensation for the calendar year ending with or within the organization's tax year

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation Enter -0- in columns (D), (E), and (F) if no compensation was paid
- List all of the organization's **current** key employees, if any See instructions for definition of "key employee "
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than $100,000 from the organization and any related organizations
- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations

List persons in the following order individual trustees or directors, institutional trustees, officers, key employees, highest compensated employees, and former such persons

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee) Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
See Additional Data Table										

Part VII **Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** *(continued)*

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position: Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations

		(D)	(E)	(F)
1b	**Sub-Total** . . . . ▶			
c	**Total from continuation sheets to Part VII, Section A** . . . . ▶			
d	**Total (add lines 1b and 1c)** . . . . ▶	415,506	0	86,607

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶2

			Yes	No
3	Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*	**3**		No
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? *If "Yes," complete Schedule J for such individual*	**4**	Yes	
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*	**5**		No

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization Report compensation for the calendar year ending with or within the organization's tax year

(A) Name and business address	(B) Description of services	(C) Compensation
RICHARD BERGMAN , 1255 N GULFSTREAM AVENUE SARASOTA FL 34236	FUNDRAISING AND OUTREACH CONSULTANT	108,521

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization ▶1

Part VIII Statement of Revenue

Check if Schedule O contains a response to any question in this Part VIII . . . . ☐

Section	Line	Description			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, Gifts, Grants and Other Similar Amounts	1a	Federated campaigns	1a					
	b	Membership dues	1b					
	c	Fundraising events	1c	8,275				
	d	Related organizations	1d					
	e	Government grants (contributions)	1e					
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	3,217,475				
	g	Noncash contributions included in lines 1a-1f $		437,965				
	h	**Total.** Add lines 1a-1f ▶			3,225,750			
Program Service Revenue				Business Code				
	2a	YOUNG AMBASSADORS		900099	103,765	103,765		
	b	ISRAEL @65		900099	86,598	86,598		
	c	HIAI PROGRAM INCOME		900099	73,863	73,863		
	d	MARCH OF THE LIVING INCOME		900099	23,263	23,263		
	e	KIRYAT YAM INCOME		900099	21,963	21,963		
	f	All other program service revenue			117,852	117,852		
	g	**Total.** Add lines 2a–2f ▶			427,304			
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts) ▶			32,449			32,449
	4	Income from investment of tax-exempt bond proceeds ▶						
	5	Royalties ▶						
			(i) Real	(ii) Personal				
	6a	Gross rents	202,615					
	b	Less rental expenses	27,729					
	c	Rental income or (loss)	174,886					
	d	Net rental income or (loss) ▶			174,886			174,886
			(i) Securities	(ii) Other				
	7a	Gross amount from sales of assets other than inventory	1,473,665					
	b	Less cost or other basis and sales expenses	1,436,762					
	c	Gain or (loss)	36,903					
	d	Net gain or (loss) ▶			36,903			36,903
	8a	Gross income from fundraising events (not including $ 8,275 of contributions reported on line 1c) See Part IV, line 18	a	76,933				
	b	Less direct expenses	b	85,997				
	c	Net income or (loss) from fundraising events ▶			-9,064			-9,064
	9a	Gross income from gaming activities See Part IV, line 19	a					
	b	Less direct expenses	b					
	c	Net income or (loss) from gaming activities ▶						
	10a	Gross sales of inventory, less returns and allowances	a					
	b	Less cost of goods sold	b					
	c	Net income or (loss) from sales of inventory ▶						
		Miscellaneous Revenue		Business Code				
	11a	ADVERTISING		541800	197,959		197,959	
	b	OTHER SUPPORT REVENUE		900099	322	322		
	c							
	d	All other revenue						
	e	**Total.** Add lines 11a–11d ▶			198,281			
	12	**Total revenue.** See Instructions ▶			4,086,509	427,626	197,959	235,174

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns All other organizations must complete column (A)

Check if Schedule O contains a response to any question in this Part IX . . . . ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States See Part IV, line 21	1,974,079	1,974,079		
2 Grants and other assistance to individuals in the United States See Part IV, line 22	146,567	146,567		
3 Grants and other assistance to governments, organizations, and individuals outside the United States See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	325,016	279,514	17,876	27,626
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	824,191	708,804	45,331	70,056
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	60,471	52,005	3,326	5,140
9 Other employee benefits	80,686	69,391	4,437	6,858
10 Payroll taxes				
11 Fees for services (non-employees)				
a Management				
b Legal	22,349	3,406	8,725	10,218
c Accounting	41,255	6,287	16,106	18,862
d Lobbying				
e Professional fundraising services See Part IV, line 17	115,660			115,660
f Investment management fees	27,673		27,673	
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	5,912	901	2,308	2,703
12 Advertising and promotion	54,462	20,742		33,720
13 Office expenses	33,061	28,433	1,817	2,811
14 Information technology	31,768	27,321	1,747	2,700
15 Royalties . .				
16 Occupancy	70,089	60,276	3,855	5,958
17 Travel	28,513	24,521	1,568	2,424
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	173,348	149,079	9,534	14,735
23 Insurance	34,915	30,027	1,920	2,968
24 Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O)				
a COMMUNITY PROGRAMS	571,099	571,099		
b NEWSPAPER PRODUCTION	121,283	69,131	52,152	
c MISCELLANEOUS	43,500	37,410	2,392	3,698
d DUES & SUBSCRIPTIONS	8,843	7,605	486	752
e All other expenses	2,727	2,345	150	232
25 **Total functional expenses.** Add lines 1 through 24e	4,797,467	4,268,943	201,403	327,121
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation Check here ▶ ☐ if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

Check if Schedule O contains a response to any question in this Part X . . . . ☐

			(A) Beginning of year		(B) End of year
Assets	1	Cash—non-interest-bearing	299	1	299
	2	Savings and temporary cash investments	2,715,970	2	3,570,638
	3	Pledges and grants receivable, net	1,214,341	3	831,750
	4	Accounts receivable, net	44,722	4	0
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L		5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Complete Part II of Schedule L		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges	95,732	9	109,082
	10a	Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D — 10a: 7,569,010			
	b	Less accumulated depreciation — 10b: 3,415,085	4,312,092	10c	4,153,925
	11	Investments—publicly traded securities	2,484,308	11	966,902
	12	Investments—other securities See Part IV, line 11	11,596,684	12	12,713,353
	13	Investments—program-related See Part IV, line 11		13	
	14	Intangible assets		14	
	15	Other assets See Part IV, line 11	218,469	15	525,960
	16	**Total assets.** Add lines 1 through 15 (must equal line 34)	22,682,617	16	22,871,909
Liabilities	17	Accounts payable and accrued expenses	142,535	17	192,202
	18	Grants payable	164,418	18	40,874
	19	Deferred revenue	8,787	19	10,875
	20	Tax-exempt bond liabilities		20	
	21	Escrow or custodial account liability Complete Part IV of Schedule D		21	
	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L		22	
	23	Secured mortgages and notes payable to unrelated third parties		23	
	24	Unsecured notes and loans payable to unrelated third parties		24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24) Complete Part X of Schedule D	1,058,554	25	872,404
	26	**Total liabilities.** Add lines 17 through 25	1,374,294	26	1,116,355
Net Assets or Fund Balances		**Organizations that follow SFAS 117 (ASC 958), check here ▶ ☑ and complete lines 27 through 29, and lines 33 and 34.**			
	27	Unrestricted net assets	12,941,680	27	12,865,227
	28	Temporarily restricted net assets	1,239,048	28	1,554,075
	29	Permanently restricted net assets	7,127,595	29	7,336,252
		Organizations that do not follow SFAS 117 (ASC 958), check here ▶ ☐ and complete lines 30 through 34.			
	30	Capital stock or trust principal, or current funds		30	
	31	Paid-in or capital surplus, or land, building or equipment fund		31	
	32	Retained earnings, endowment, accumulated income, or other funds		32	
	33	Total net assets or fund balances	21,308,323	33	21,755,554
	34	Total liabilities and net assets/fund balances	22,682,617	34	22,871,909

Part XI Reconcilliation of Net Assets

Check if Schedule O contains a response to any question in this Part XI . . . . ☑

1	Total revenue (must equal Part VIII, column (A), line 12)	1	4,086,509
2	Total expenses (must equal Part IX, column (A), line 25)	2	4,797,467
3	Revenue less expenses Subtract line 2 from line 1	3	-710,958
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	21,308,323
5	Net unrealized gains (losses) on investments	5	41,213
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	1,116,976
10	Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	21,755,554

Part XII Financial Statements and Reporting

Check if Schedule O contains a response to any question in this Part XII . . . . ☑

			Yes	No
1	Accounting method used to prepare the Form 990 ☐ Cash ☑ Accrual ☐ Other ______ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		No
	If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes	
	If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both ☑ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
c	If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	Yes	
	If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a		No
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits	3b		

SCHEDULE A (Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047

2012

Open to Public Inspection

Name of the organization
SARASOTA-MANATEE JEWISH FEDERATION INC

Employer identification number
59-1227747

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is (For lines 1 through 11, check only one box)

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state ______

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☑ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II)

9 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2).** (Complete Part III)

10 ☐ An organization organized and operated exclusively to test for public safety See **section 509(a)(4).**

11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h
a ☐ Type I **b** ☐ Type II **c** ☐ Type III - Functionally integrated **d** ☐ Type III - Non-functionally integrated

e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)

f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box ☐

g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

		Yes	No
(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?	**11g(i)**		
(ii) A family member of a person described in (i) above?	**11g(ii)**		
(iii) A 35% controlled entity of a person described in (i) or (ii) above?	**11g(iii)**		

h Provide the following information about the supported organization(s)

(i) Name of supported organization	**(ii)** EIN	**(iii)** Type of organization (described on lines 1- 9 above or IRC section **(see instructions)**)	**(iv)** Is the organization in col **(i)** listed in your governing document? Yes	No	**(v)** Did you notify the organization in col **(i)** of your support? Yes	No	**(vi)** Is the organization in col **(i)** organized in the U S ? Yes	No	**(vii)** Amount of monetary support
Total									

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**
(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")	5,025,531	3,537,808	4,136,908	3,688,474	3,225,750	19,614,471
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 **Total.** Add lines 1 through 3	5,025,531	3,537,808	4,136,908	3,688,474	3,225,750	19,614,471
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						943,206
6 **Public support.** Subtract line 5 from line 4						18,671,265

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
7 Amounts from line 4	5,025,531	3,537,808	4,136,908	3,688,474	3,225,750	19,614,471
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	621,480	165,166	274,841	170,562	235,064	1,467,113
9 Net income from unrelated business activities, whether or not the business is regularly carried on	67,955	83,410	191,952	125,660	197,959	666,936
10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)	110,752	53,335	298	1,214	322	165,921
11 **Total support** (Add lines 7 through 10)						21,914,441

12 Gross receipts from related activities, etc (see instructions) | 12 | 1,636,906

13 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and **stop here** . . . . ▶☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2012 (line 6, column (f) divided by line 11, column (f)) | 14 | 85 200 %

15 Public support percentage for 2011 Schedule A, Part II, line 14 | 15 | 84 180 %

16a **33 1/3% support test—2012.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶☑

b **33 1/3% support test—2011.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶☐

17a **10%-facts-and-circumstances test—2012.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization ▶☐

b **10%-facts-and-circumstances test—2011.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization ▶☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶☐

Part III **Support Schedule for Organizations Described in Section 509(a)(2)**
(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 **Public support** (Subtract line 7c from line 6)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
13 **Total support.** (Add lines 9, 10c, 11, and 12)						

14 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and **stop here** ▶☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2012 (line 8, column (f) divided by line 13, column (f))	15	
16 Public support percentage from 2011 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2012** (line 10c, column (f) divided by line 13, column (f))	17	
18 Investment income percentage from **2011** Schedule A, Part III, line 17	18	

19a **33 1/3% support tests—2012.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶☐

b **33 1/3% support tests—2011.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶☐

Part IV **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

Explanation

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93493219012303

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2012

Open to Public Inspection

Name of the organization
SARASOTA-MANATEE JEWISH FEDERATION INC

Employer identification number
59-1227747

Part I **Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

		(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year	26	
2	Aggregate contributions to (during year)	104,220	
3	Aggregate grants from (during year)	212,289	
4	Aggregate value at end of year	970,646	

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☑ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☑ Yes ☐ No

Part II **Conservation Easements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e g , recreation or education)
☐ Preservation of an historically important land area
☐ Protection of natural habitat
☐ Preservation of a certified historic structure
☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

			Held at the End of the Year
a	Total number of conservation easements	2a	
b	Total acreage restricted by conservation easements	2b	
c	Number of conservation easements on a certified historic structure included in (a)	2c	
d	Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register	2d	

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶__________

4 Number of states where property subject to conservation easement is located ▶__________

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ▶__________

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ $ __________

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

Part III **Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.** Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1 ▶ $ __________

(ii) Assets included in Form 990, Part X ▶ $ __________

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items

a Revenues included in Form 990, Part VIII, line 1 ▶ $ __________

b Assets included in Form 990, Part X ▶ $ __________

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets *(continued)*

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply)

a ☐ Public exhibition
b ☐ Scholarly research
c ☐ Preservation for future generations
d ☐ Loan or exchange programs
e ☐ Other

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII

5 During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ **Yes** ☐ **No**

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ **Yes** ☐ **No**

b If "Yes," explain the arrangement in Part XIII and complete the following table

		Amount
c Beginning balance	1c	
d Additions during the year	1d	
e Distributions during the year	1e	
f Ending balance	1f	

2a Did the organization include an amount on Form 990, Part X, line 21? ☐ **Yes** ☐ **No**

b If "Yes," explain the arrangement in Part XIII Check here if the explanation has been provided in Part XIII . . . . ☐

Part V Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	**(b)** Prior year	**b (c)** Two years back	**(d)** Three years back	**(e)** Four years back
1a Beginning of year balance	327,909	374,175	341,469	325,924	471,202
b Contributions					
c Net investment earnings, gains, and losses	38,154	-23,800	66,302	46,030	-106,576
d Grants or scholarships		21,220	1,806		
e Other expenditures for facilities and programs	26,590		28,302	27,728	35,884
f Administrative expenses	2,904	1,246	3,488	2,757	2,818
g End of year balance	336,569	327,909	374,175	341,469	325,924

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as

a Board designated or quasi-endowment ►

b Permanent endowment ►

c Temporarily restricted endowment ►

The percentages in lines 2a, 2b, and 2c should equal 100%

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

		Yes	No
(i) unrelated organizations	3a(i)	Yes	
(ii) related organizations	3a(ii)		No
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?	3b		

4 Describe in Part XIII the intended uses of the organization's endowment funds

Part VI Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of property	**(a)** Cost or other basis (investment)	**(b)** Cost or other basis (other)	**(c)** Accumulated depreciation	**(d)** Book value
1a Land		1,022,395		1,022,395
b Buildings		6,166,316	3,080,574	3,085,742
c Leasehold improvements		36,254		36,254
d Equipment		294,945	285,411	9,534
e Other		49,100	49,100	0
Total. Add lines 1a through 1e *(Column (d) must equal Form 990, Part X, column (B), line 10(c).)* ►				4,153,925

Part VII Investments—Other Securities. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b)Book value	(c) Method of valuation Cost or end-of-year market value
(1)Financial derivatives		
(2)Closely-held equity interests		
(3)Other (A) PARTNERSHIP INTEREST IN JEWISH COMMUNITY ENDOWMENT POOL	12,713,353	F
Total. *(Column (b) must equal Form 990, Part X, col (B) line 12)* ▶	12,713,353	

Part VIII Investments—Program Related. See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Total. *(Column (b) must equal Form 990, Part X, col (B) line 13)* ▶		

Part IX Other Assets. See Form 990, Part X, line 15.

(a) Description	(b) Book value
Total. *(Column (b) must equal Form 990, Part X, col.(B) line 15.)* . . . . ▶	

Part X Other Liabilities. See Form 990, Part X, line 25.

1 (a) Description of liability	(b) Book value
Federal income taxes	
ANNUITIES & TRUSTS PAYABLE	733,658
FUNDS HELD ON BEHALF OF OTHERS	138,746
Total. *(Column (b) must equal Form 990, Part X, col (B) line 25)* ▶	872,404

2. Fin 48 (ASC 740) Footnote In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740) Check here if the text of the footnote has been provided in Part XIII ☑

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements			1	5,446,221
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12				
a	Net unrealized gains on investments	2a	41,213		
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII)	2d	1,318,499		
e	Add lines **2a** through **2d**			2e	1,359,712
3	Subtract line **2e** from line **1**			3	4,086,509
4	Amounts included on Form 990, Part VIII, line 12, but not on line **1**				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII)	4b			
c	Add lines **4a** and **4b**			4c	0
5	Total revenue Add lines **3** and **4c.** (This must equal Form 990, Part I, line 12)			5	4,086,509

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements			1	4,998,990
2	Amounts included on line 1 but not on Form 990, Part IX, line 25				
a	Donated services and use of facilities	2a			
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII)	2d	201,523		
e	Add lines **2a** through **2d**			2e	201,523
3	Subtract line **2e** from line **1**			3	4,797,467
4	Amounts included on Form 990, Part IX, line 25, but not on line **1:**				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII)	4b			
c	Add lines **4a** and **4b**			4c	0
5	Total expenses Add lines **3** and **4c.** (This must equal Form 990, Part I, line 18)			5	4,797,467

Part XIII Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, line 2, Part XI, lines 2d and 4b, and Part XII, lines 2d and 4b Also complete this part to provide any additional information

Identifier	Return Reference	Explanation
DESCRIPTION OF INTENDED USE OF ENDOWMENT FUNDS	PART V, LINE 4	ALL ENDOWMENT FUNDS ARE ADMINISTERED IN ACCORDANCE WITH THE DONOR AGREEMENT RESTRICTED FUNDS ARE USED FOR PROGRAMS TO PROMOTE JEWISH CONTINUITY OR PROVIDE FINANCIAL ASSISTANCE IN OUR COMMUNITY SCHOLARSHIP FUNDS ARE USED TO AWARD POST HIGH SCHOOL SCHOLARSHIPS TO STUDENTS IN OUR COMMUNITY MEETING THE REQUIRED CRITERIA UNRESTRICTED FUND IS USED TO SUPPORT THE SARASOTA-MANATEE JEWISH FEDERATION (FEDERATION) PROGRAMS AS DETERMINED BY THE BOARD OF DIRECTORS THE PERMANENTLY ENDOWED FUNDS ARE FUNDS HELD IN PERPETUITY WITH THE INCOME USED TO IMPLEMENT THE FEDERATION MISSION
DESCRIPTION OF UNCERTAIN TAX POSITIONS UNDER FIN 48	PART X, LINE 2	UNDER THE INCOME TAXES TOPIC OF THE FASB ACCOUNTING STANDARDS CODIFICATION, THE FEDERATION HAS REVIEWED AND EVALUATED THE RELEVANT TECHNICAL MERITS OF EACH OF ITS TAX POSITIONS IN ACCORDANCE WITH ACCOUNTING PRINCIPLES GENERALLY ACCEPTED IN THE UNITED STATES OF AMERICA FOR ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES, AND DETERMINED THAT THERE ARE NO UNCERTAIN TAX POSITIONS THAT WOULD HAVE A MATERIAL IMPACT ON THE FINANCIAL STATEMENTS OF THE FEDERATION
PART XI, LINE 2D - OTHER ADJUSTMENTS		CHANGE IN VALUE OF JCEP 1,066,669 CHANGE IN SPLIT INTEREST AGREEMENT 71,833 BAD DEBT EXPENSE 173,792 RENTAL EXPENSE 27,729 CHANGE IN VALUE OF REINSURANCE RECEIVABLE -21,524
PART XII, LINE 2D - OTHER ADJUSTMENTS		BAD DEBT EXPENSE 173,794 RENTAL EXPENSE 27,729

SCHEDULE F
(Form 990)

Department of the Treasury
Internal Revenue Service

Statement of Activities Outside the United States

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 14b, 15, or 16.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2012

Open to Public Inspection

Name of the organization
SARASOTA-MANATEE JEWISH FEDERATION INC

Employer identification number
59-1227747

Part I **General Information on Activities Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 14b.

1 **For grantmakers.** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . ☐ Yes ☐ No

2 **For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of grant funds outside the United States.

3 Activities per Region (The following Part I, line 3 table can be duplicated if additional space is needed)

	(a) Region	(b) Number of offices in the region	(c) Number of employees, agents, and independent contractors in region	(d) Activities conducted in region (by type) (e g , fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for and investments in region
	MIDDLE EAST AND NORTH AFRICA	0	0	PROGRAM SERVICE EXPENSES	EXPENSES FOR A MISSION TRIP TO ISRAEL	42,100
	MIDDLE EAST AND NORTH AFRICA	0	0	PROGRAM SERVICE EXPENSES	CONSULTING SERVICES FOR JOINT PROGRAM WITH KIRYAT YAM, ISRAEL	9,000
	MIDDLE EAST AND NORTH AFRICA	0	0	PROGRAM SERVICE EXPENSES	RENTAL OF FOREIGN FILMS FOR FILM FESTIVAL	2,500
	MIDDLE EAST AND NORTH AFRICA	0	0	PROGRAM SERVICE EXPENSES	USE OF CARTOON CONTENT	180
3a	Sub-total	0	0			53,780
b	Total from continuation sheets to Part I	0	0			0
c	**Totals** (add lines 3a and 3b)	0	0			53,780

Part II **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 15, for any recipient who received more than $5,000. Part II can be duplicated if additional space is needed.

1 (a) Name of organization	(b) IRS code section and EIN (if applicable)	(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of of non-cash assistance	(h) Description of non-cash assistance	(i) Method of valuation (book, FMV, appraisal, other)

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter . . . . ▶

3 Enter total number of other organizations or entities . . . . ▶

Part III **Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 16. Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	**(b)** Region	**(c)** Number of recipients	**(d)** Amount of cash grant	**(e)** Manner of cash disbursement	**(f)** Amount of non-cash assistance	**(g)** Description of non-cash assistance	**(h)** Method of valuation (book, FMV, appraisal, other)

Part IV Foreign Forms

1	Was the organization a U S transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)*	☐ Yes	☑ No
2	Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organizationmay be required to file Form 3520, Annual Return to Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A)*	☐ Yes	☑ No
3	Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons with Respect to Certain Foreign Corporations. (see Instructions for Form 5471)*	☐ Yes	☑ No
4	Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund. (see Instructions for Form 8621)*	☐ Yes	☑ No
5	Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons with Respect to Certain Foreign Partnerships. (see Instructions for Form 8865)*	☐ Yes	☑ No
6	Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to file Form 5713, International Boycott Report (see Instructions for Form 5713).*	☐ Yes	☑ No

Part V **Supplemental Information**

Complete this part to provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information (see instructions).

Identifier	ReturnReference	Explanation
METHOD USED TO ACCCOUNT FOR EXPENDITURES		SCHEDULE F, PART I, LINE 3 PAYMENT TO OVERSEAS IS ONLY FOR SPECIFIC VENDOR SERVICES THE OVERSIGHT INCLUDES RECEIVING THE CONTRACTED SERVICES

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SCHEDULE G (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a. Form 990-EZ filers are not required to complete this part.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047

2012

Open to Public Inspection

Name of the organization
SARASOTA-MANATEE JEWISH FEDERATION INC

Employer identification number
59-1227747

Part I Fundraising Activities. Complete if the organization answered "Yes" to Form 990, Part IV, line 17.

1 Indicate whether the organization raised funds through any of the following activities Check all that apply

- **a** ☑ Mail solicitations
- **b** ☑ Internet and email solicitations
- **c** ☑ Phone solicitations
- **d** ☑ In-person solicitations
- **e** ☑ Solicitation of non-government grants
- **f** ☐ Solicitation of government grants
- **g** ☑ Special fundraising events

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☑ **Yes** ☐ **No**

b If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions? Yes	No	(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col (i)	(vi) Amount paid to (or retained by) organization
RICHARD BERGMAN 1255 N GULFSTREAM AVE SARASOTA, FL 34236	DEVELOPMENT CONSULTANT - FUND RAISING AND COMMUNITY OUTREACH		No	673,729	108,521	565,208
SIEGEL MARKETING 1845 N FARWELL AVENUE SUITE 300 MILWAUKEE, WI 53202	TELEMARKETING CAMPAIGNS		No	54,159	7,139	47,020
Total . . . . ▶				727,888	115,660	612,228

3 List all states in which the organization is registered or licensed to solicit funds or has been notified it is exempt from registration or licensing

FL

Part II **Fundraising Events.** Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than $15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than $5,000.

		(a) Event #1 LION OF JUDAH (event type)	(b) Event #2 MATISYAHU CONCERT (event type)	(c) Other events 1 (total number)	(d) Total events (add col (a) through col (c))
Revenue	1 Gross receipts	16,250	61,054	7,904	85,208
	2 Less Contributions	5,300	2,975		8,275
	3 Gross income (line 1 minus line 2)	10,950	58,079	7,904	76,933
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs		3,989		3,989
	7 Food and beverages	5,060	2,520	18,568	26,148
	8 Entertainment		28,153		28,153
	9 Other direct expenses	10,967	14,868	1,872	27,707
	10 Direct expense summary Add lines 4 through 9 in column (d) ▶				(85,997)
	11 Net income summary Combine line 3, column (d), and line 10 ▶				-9,064

Part III **Gaming.** Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than $15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col (a) through col (c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Non-cash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes ____ ☐ No	☐ Yes ____ ☐ No	☐ Yes ____ ☐ No	
	7 Direct expense summary Add lines 2 through 5 in column (d) ▶				
	8 Net gaming income summary Combine lines 1 and 7 in column (d) ▶				

9 Enter the state(s) in which the organization operates gaming activities

a Is the organization licensed to operate gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain

Does the organization operate gaming activities with nonmembers? . . . . ☐ Yes ☐ No

12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? . . . . ☐ Yes ☐ No

13 Indicate the percentage of gaming activity operated in

a The organization's facility	13a	
b An outside facility	13b	

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records

Name ▶

Address ▶

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? . . . . ☐ Yes ☐ No

b If "Yes," enter the amount of gaming revenue received by the organization ▶ $ ______ and the amount of gaming revenue retained by the third party ▶ $ ______

c If "Yes," enter name and address of the third party

Name ▶

Address ▶

16 Gaming manager information

Name ▶

Gaming manager compensation ▶ $

Description of services provided ▶

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? . . . . ☐ Yes ☐ No

b Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ $

Part IV **Supplemental Information.** Complete this part to provide the explanations required by Part I, line 2b, columns (iii) and (v), and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also complete this part to provide any additional information (see instructions).

Identifier	Return Reference	Explanation
EXPLANATION OF FUNDRAISING PAYMENTS	SCHEDULE G, PART I, LINE 2B, COLUMN (V)	THE AGREEMENT STIPULATES A FIXED AMOUNT FOR FUNDRAISING SERVICES THE CONSULTANT SUBMITS RECEIPTS FOR EXPENSE PAYMENTS THE ORGANIZATION HAS NO EXPENSES ONLY ARRANGEMENT WITH ANY FUNDRAISERS