Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2012

Open to public inspection

For calendar year 2012 or tax year beginning , and ending

Name of foundation: THE BLUM FAMILY FOUNDATION

A Employer identification number: 62-1871174

Number and street (or P O box number if mail is not delivered to street address): 909 BOWRING PARK

Room/suite

B Telephone number: (615) 383-4965

City or town, state, and ZIP code: NASHVILLE, TN 37215-2456

C If exemption application is pending, check here ▶ [ ]

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

D 1. Foreign organizations, check here ▶ [ ]

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ [ ]

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

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶$ 2,207,157.

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

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

Part I **Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

	Line		(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	186,385.			
	2	Check ▶ [ ] if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	17.	17.	17.	STATEMENT 1
	4	Dividends and interest from securities	33,397.	33,397.	33,397.	STATEMENT 2
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	228,472.			
	b	Gross sales price for all assets on line 6a 408,287.				
	7	Capital gain net income (from Part IV, line 2)		228,472.		
	8	Net short-term capital gain			N/A	
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss)				
	11	Other income				
	12	**Total.** Add lines 1 through 11	448,271.	261,886.	33,414.	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees				
	b	Accounting fees				
	c	Other professional fees STMT 3	35,548.	35,548.	0.	0.
	17	Interest				
	18	Taxes STMT 4	1,971.	0.	0.	0.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	37,519.	35,548.	0.	0.
	25	Contributions, gifts, grants paid	224,805.			224,805.
	26	**Total expenses and disbursements.** Add lines 24 and 25	262,324.	35,548.	0.	224,805.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	185,947.			
	b	**Net investment income** (if negative, enter -0-)		226,338.		
	c	**Adjusted net income** (if negative, enter -0-)			33,414.	

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12350811 099909 BLU1174NSH 2012.04010 THE BLUM FAMILY FOUNDATION BLU11741

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

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing	2,541.	94,961.	94,961.
	2 Savings and temporary cash investments	4,849.	2.	2.
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶ Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 5	1,234,315.	1,429,352.	2,112,194.
	14 Land, buildings, and equipment: basis ▶ Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers)	1,241,705.	1,524,315.	2,207,157.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	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.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,241,705.	1,524,315.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 **Total net assets or fund balances**	1,241,705.	1,524,315.	
	31 **Total liabilities and net assets/fund balances**	1,241,705.	1,524,315.	

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	1,241,705.
2	Enter amount from Part I, line 27a	2	185,947.
3	Other increases not included in line 2 (itemize) ▶ INCREASE IN FUND BALANCE	3	96,663.
4	Add lines 1, 2, and 3	4	1,524,315.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,524,315.

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				
b	SEE ATTACHED STATEMENT			
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				
b				
c				
d				
e	408,287.		179,815.	228,472.

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				
b				
c				
d				
e				228,472.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 } — 2 — 228,472.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 — 3 — -8,323.

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	192,459.	2,042,838.	.094212
2010	180,925.	2,026,493.	.089280
2009	137,105.	1,842,147.	.074427
2008	182,893.	1,438,870.	.127109
2007	147,107.	1,982,573.	.074200

2	Total of line 1, column (d)	2	.459228
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	.091846
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	2,116,200.
5	Multiply line 4 by line 3	5	194,365.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,263.
7	Add lines 5 and 6	7	196,628.
8	Enter qualifying distributions from Part XII, line 4	8	224,805.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see instructions)				
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b			1	2,263.
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	2,263.
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	2,263.
6 Credits/Payments:				
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	1,971.		
b Exempt foreign organizations - tax withheld at source	6b			
c Tax paid with application for extension of time to file (Form 8868)	6c	3,000.		
d Backup withholding erroneously withheld	6d			
7 Total credits and payments. Add lines 6a through 6d			7	4,971.
8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	
9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	2,708.
11 Enter the amount of line 10 to be: **Credited to 2013 estimated tax** ▶ 2,708. **Refunded** ▶			11	0.

Part VII-A Statements Regarding Activities

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

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

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ JOAN B. SHAYNE Telephone no. ▶ (615) 383-4965

Located at ▶ 909 BOWRING PARK, NASHVILLE, TN ZIP+4 ▶ 37215-2456

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

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

		Line	Yes	No
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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

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

			Line	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?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		1b		X
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?	☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ____, ____, ____, ____				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2012 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.)*	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?		4b		X

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

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOAN B. SHAYNE NASHVILLE, TN	TRUSTEE 0.00	0.	0.	0.
JENNIFER L. BLUM SANTA MONICA, CA	TRUSTEE 0.00	0.	0.	0.
LAUREN BLUM NEW YORK, NY	TRUSTEE 0.00	0.	0.	0.
EMILY BLUM HASLETT NEW YORK, NY	TRUSTEE 0.00	0.	0.	0.

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

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

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

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		0

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

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

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	2,112,194.
b	Average of monthly cash balances	1b	36,232.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	2,148,426.
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	2,148,426.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	32,226.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,116,200.
6	**Minimum investment return.** Enter 5% of line 5	6	105,810.

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	105,810.
2a	Tax on investment income for 2012 from Part VI, line 5 — 2a: 2,263.		
b	Income tax for 2012. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	2,263.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	103,547.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	103,547.
6	Deduction from distributable amount (see instructions)	6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	103,547.

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	224,805.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	224,805.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,263.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	222,542.

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				103,547.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			0.	
b Total for prior years: ______ , ______ , ______		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007 53,390.				
b From 2008 112,060.				
c From 2009 46,094.				
d From 2010 82,865.				
e From 2011 93,775.				
f **Total** of lines 3a through e	388,184.			
4 Qualifying distributions for 2012 from Part XII, line 4: ▶ $ 224,805.				
a Applied to 2011, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2012 distributable amount				103,547.
e Remaining amount distributed out of corpus	121,258.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	509,442.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
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)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7	53,390.			
9 **Excess distributions carryover to 2013.** Subtract lines 7 and 8 from line 6a	456,052.			
10 Analysis of line 9:				
a Excess from 2008 112,060.				
b Excess from 2009 46,094.				
c Excess from 2010 82,865.				
d Excess from 2011 93,775.				
e Excess from 2012 121,258.				

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

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

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

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

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

1 **Information Regarding Foundation Managers:**

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

SEE STATEMENT 6

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

NONE

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

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

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

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

c Any submission deadlines:

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

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				
SCHEDULE ATTACHED		EXEMPT	SEE ATTACHED	224,805.
Total			▶ 3a	224,805.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	17.	
4 Dividends and interest from securities			18	33,397.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	228,472.	0.
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.		261,886.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 261,886.

(See worksheet in line 13 instructions to verify calculations.)

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

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

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

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

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

b If "Yes," complete the following schedule.

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

Sign Here

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

Horace B. Sharpe | 8/19/13 | TRUSTEE

Signature of officer or trustee | Date | Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Alana Carroll	Alana Carroll	8/12/13		P01263172
Firm's name ▶ DELOITTE TAX LLP			Firm's EIN ▶ 86-1065772	
Firm's address ▶ 424 CHURCH STREET, SUITE 2400 NASHVILLE, TN 37219			Phone no. (615) 259-1800	

Form **990-PF** (2012)

223622
12-05-12

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

Schedule of Contributors

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

OMB No 1545-0047

2012

Name of the organization	Employer identification number
THE BLUM FAMILY FOUNDATION	62-1871174

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	[X] 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

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

Special Rules

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

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

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

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

Name of organization	Employer identification number
THE BLUM FAMILY FOUNDATION	62-1871174

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	JOAN B. SHAYNE 909 BOWRING PARK NASHVILLE, TN 372152456	$ 25,088.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
2	JOAN B. SHAYNE 909 BOWRING PARK NASHVILLE, TN 372152456	$ 125,405.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
3	LAUREN BLUM 35 EAST 85TH STREET NEW YORK, NY 10028	$ 35,892.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization	Employer identification number
THE BLUM FAMILY FOUNDATION	62-1871174

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	694 SHARES DONALDSON INC. COMMON STOCK COST:$8,890	$ 25,088.	06/19/12
2	700 SHARES METTLER-TOLEDO INTERNATIONAL INC. COMMON STOCK COST: $40,313	$ 125,405.	11/20/12
3	600 SHARES C.H. ROBINSON COMMON STOCK COST: $8,310	$ 35,892.	11/20/12
		$	
		$	
		$	

Name of organization	Employer identification number
THE BLUM FAMILY FOUNDATION	62-1871174

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

Use duplicate copies of Part III if additional space is needed.

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
BANK OF AMERICA-INTEREST CHECKING	17.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	17.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
FROM BELLE MEADE ASSOCIATES NT, LP K-1	33,397.	0.	33,397.
STATE STREET BANK & TRUST	0.	0.	0.
TOTAL TO FM 990-PF, PART I, LN 4	33,397.	0.	33,397.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FROM BELLE MEADE ASSOCIATES NT, LP K-1	35,548.	35,548.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	35,548.	35,548.	0.	0.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
	1,971.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	1,971.	0.	0.	0.

FORM 990-PF OTHER INVESTMENTS STATEMENT 5

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
BELLE MEADE ASSOCIATES NT, LP	COST	1,429,352.	2,112,194.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,429,352.	2,112,194.

FORM 990-PF PART XV - LINE 1A STATEMENT 6
LIST OF FOUNDATION MANAGERS

NAME OF MANAGER
JOAN B. SHAYNE
LAUREN BLUM

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	BELLE MEADE ASSOCIATES NT L.P.	P	VARIOUS	12/30/12
b	BELLE MEADE ASSOCIATES NT L.P.	P	VARIOUS	12/30/12
c	CH ROBINSON WORLDWIDE INC	P	VARIOUS	11/26/12
d	DONALDSON INC.	P	02/19/04	06/19/12
e	METTLER TOLEDO INTERNATIONAL INC.	P	02/18/09	11/26/12
f	37.7035 SHARES BELLE MEADE ASSOCIATES NT, L.P	P	06/30/11	VARIOUS
g	31.9457 SHARES BELLE MEADE ASSOCIATES NT, L.P	P	11/30/10	VARIOUS
h	3.2137 SHARES BELLE MEADE ASSOCIATES NT, L.P	P	01/31/08	10/01/12
i				
j				
k				
l				
m				
n				
o				

	(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	-7,909.			-7,909.
b	98,901.			98,901.
c	36,557.		8,310.	28,247.
d	25,018.		8,890.	16,128.
e	128,188.		40,313.	87,875.
f	66,165.		66,579.	-414.
g	55,598.		50,781.	4,817.
h	5,769.		4,942.	827.
i				
j				
k				
l				
m				
n				
o				

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a				** -7,909.
b				98,901.
c				28,247.
d				16,128.
e				87,875.
f				** -414.
g				4,817.
h				827.
i				
j				
k				
l				
m				
n				
o				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter "-0-" in Part I, line 7 }	2	228,472.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	-8,323.

223591
05-01-12

** (SHORT-TERM)

Split	Date	Check #	Payee	Tags	Amount	Account
	1/9/2012		Books from Birth of Middle Tennessee		-$100.00	Blum Family Foundation
	1/30/2012		OIC		-$6,000.00	Blum Family Foundation
	1/31/2012		Family and Children's Service		-$200.00	Blum Family Foundation
	1/31/2012		World Union for Progressive Judaism		-$750.00	Blum Family Foundation
	1/31/2012		Vanderbilt University	Shade Tree Clinic	-$200.00	Blum Family Foundation
	1/31/2012		Sexual Assault Center		-$100.00	Blum Family Foundation
	1/31/2012		The Temple Yahrzeit Fund		-$300.00	Blum Family Foundation
	1/31/2012		Ballet Ball 2012		-$150.00	Blum Family Foundation
	1/31/2012		National MS Society		-$100.00	Blum Family Foundation
	1/31/2012		Safe Haven Family Shelter		-$250.00	Blum Family Foundation
	1/31/2012		Americans for Peace Now		-$300.00	Blum Family Foundation
	2/1/2012		March of Dimes		-$35.00	Blum Family Foundation
	2/7/2012		Nashville Public Education Foundation		-$750.00	Blum Family Foundation
	2/16/2012		Nashville OIC		-$500.00	Blum Family Foundation
	2/18/2012		Fifty Forward-the Crown Affair		-$1,000.00	Blum Family Foundation
	2/18/2012		The Swan Ball 2012		-$250.00	Blum Family Foundation
	2/18/2012		Park Center		-$150.00	Blum Family Foundation
	2/26/2012		Consumer Reports		-$35.00	Blum Family Foundation
	2/28/2012	1702	The Swan Ball 2012		-$250.00	Blum Family Foundation
	2/28/2012	1700	Nashville OIC		-$500.00	Blum Family Foundation
	2/29/2012		The Wellesley Fund		-$400.00	Blum Family Foundation
	2/29/2012	1703	The Belcourt Theatre		-$150.00	Blum Family Foundation
	2/29/2012	1707	Nashville Symphony		-$150.00	Blum Family Foundation

		Orchestra League			
3/27/2012	1714	The Conservancy		-$250.00	Blum Family Foundation
3/28/2012	1716	Doctor without Borders USA		-$250.00	Blum Family Foundation
3/29/2012	1718	ACLU Foundation		-$250.00	Blum Family Foundation
3/30/2012	1715	The Nature Conservancy		-$100.00	Blum Family Foundation
3/30/2012	1713	The Fenn Scho	In honor of Will Haslett	-$200.00	Blum Family Foundation
3/30/2012	1711	WCC Foundatic		-$350.00	Blum Family Foundation
4/2/2012	1720	Alzheimers Association		-$25.00	Blum Family Foundation
4/2/2012	1721	Vermont Commons School	In honor of Will Shayne	-$150.00	Blum Family Foundation
4/2/2012	1723	The Frist Cent for the VisualnArts		-$200.00	Blum Family Foundation
4/2/2012	1722	CASA		-$200.00	Blum Family Foundation
4/2/2012	1717	PENCIL Foundation		-$300.00	Blum Family Foundation
4/4/2012	1724	The Women's Fund of the Community Foundation		-$300.00	Blum Family Foundation
4/4/2012	1725	Temple Arts Festival		-$500.00	Blum Family Foundation
4/4/2012	1712	Pardes Institut of Jewish Studies		-$6,500.00	Blum Family Foundation
4/5/2012	1719	Vanderbilt Magazine		-$40.00	Blum Family Foundation
4/10/2012	1726	The Abraham Fund Initiative		-$500.00	Blum Family Foundation
4/16/2012	1727	Fifty Forward-the Crown Aff		-$250.00	Blum Family Foundation
4/16/2012	1728	Philips Exeter Academy	In honor of Nat and Charlotte Haslett	-$200.00	Blum Family Foundation
4/16/2012	1729	Women for Women International	In honor of Sandra Meyer	-$300.00	Blum Family Foundation
4/16/2012	1730	Seeds of Peace	In honor of Ben Schwartz and Family	-$500.00	Blum Family Foundation
4/16/2012	1731	Jewish Family Service		-$300.00	Blum Family Foundation
4/16/2012	1732	Creative Alternatives of	In honor of Ellen Kealy	-$1,000.00	Blum Family Foundation

4/16/2012	1733	NYC The J. Paschall Davis Fund	Joan		-$200.00	Blum Family Foundation
4/18/2012	1738	World Wildlife Fund	'---		-$50.00	Blum Family Foundation
4/24/2012	1740	Learning Leaders			-$5,000.00	Blum Family Foundation
5/3/2012	1741	United Way		In memory of James Meadows	-$50.00	Blum Family Foundation
5/5/2012	1745	The Lymphoma Foundation			-$250.00	Blum Family Foundation
5/5/2012	1746	The Swan Ball - Cheekwood			-$750.00	Blum Family Foundation
5/5/2012	1748	Community Nashville			-$200.00	Blum Family Foundation
5/5/2012	1747	PENCIL Foundation			-$300.00	Blum Family Foundation
5/5/2012	1742	Tennessee Repertory Theatre			-$200.00	Blum Family Foundation
5/5/2012	1743	Second Harves Food Bank of Middle Tenn			-$500.00	Blum Family Foundation
5/11/2012	1754	Environmental Defense			-$500.00	Blum Family Foundation
5/11/2012	1751	U.S. Fund for UNICEF			-$300.00	Blum Family Foundation
5/11/2012	1752	National Wildlil Federation			-$25.00	Blum Family Foundation
5/11/2012	1753	Tennessee Justice Center			-$200.00	Blum Family Foundation
5/27/2012	1758	USN/Artclectic			-$500.00	Blum Family Foundation
5/31/2012	1759	Pardes Institut of Jewish Studies			-$100.00	Blum Family Foundation
5/31/2012	1760	The Temple			-$50.00	Blum Family Foundation
6/19/2012	1766	Jewish Federation of Nashville and Middle Tennessee			-$5,000.00	Blum Family Foundation
6/19/2012	1767	Jewish Federation of Nashville and Middle Tennessee			-$3,000.00	Blum Family Foundation
6/19/2012	1768	Nashville Publi Library Foundation			-$1,500.00	Blum Family Foundation
7/4/2012	1770	Alive Hospice			-$75.00	Blum Family Foundation
7/4/2012	1771	The Temple Congregation Ohabai Sholom			-$300.00	Blum Family Foundation

7/12/2012	1777	NRDC		-$500.00	Blum Family Foundation
7/12/2012	1775	PPMET		-$500.00	Blum Family Foundation
7/16/2012	1776	Nashville OIC		-$6,000.00	Blum Family Foundation
8/23/2012	1773	Morris and Sylvia Davis Family Designated Fund for West End Synagogu	Memory of Leny Sell	-$75.00	Blum Family Foundation
9/14/2012	1778	Nashville Symphony		-$1,000.00	Blum Family Foundation
9/14/2012	1779	Nashville Ope Guild		-$150.00	Blum Family Foundation
9/14/2012	1780	COA		-$100.00	Blum Family Foundation
9/14/2012	1781	Humanities Tennessee		-$200.00	Blum Family Foundation
9/14/2012	1782	ACLU Foundation of Tennessee		-$1,500.00	Blum Family Foundation
9/14/2012	1783	The Observer		-$100.00	Blum Family Foundation
9/14/2012	1784	Nashville Publ Library Foundation		-$750.00	Blum Family Foundation
9/14/2012	1786	Gordon Jewish Community Center		-$1,000.00	Blum Family Foundation
9/14/2012	1788	Cheekwood		-$300.00	Blum Family Foundation
9/14/2012	1789	Humanities Tennessee		-$200.00	Blum Family Foundation
9/20/2012	1790	The Conservancy Gala	In honor of Hope Stringer	-$200.00	Blum Family Foundation
9/20/2012	1791	The Land Trus for Tennessee		-$500.00	Blum Family Foundation
9/20/2012	1792	CFMT/Joe Kra		-$250.00	Blum Family Foundation
9/24/2012	1793	ACLU Foundation of Tennessee		-$3,500.00	Blum Family Foundation
10/10/2012	1794	Fifty Forward		-$1,500.00	Blum Family Foundation
10/10/2012	1796	Friends of Warner Park		-$1,000.00	Blum Family Foundation
10/12/2012	1797	Legal Aid Society		-$2,500.00	Blum Family Foundation
10/12/2012	1798	Sexual Assault Center		-$150.00	Blum Family Foundation
10/12/2012	1800	Learning Leaders		-$500.00	Blum Family Foundation
10/12/2012	1801	Women for Women	In honor of Sandra	-$300.00	Blum Family Foundation

		Theatre		Foundation
12/10/2012	1839	Tennessee Justice Center	-$200.00	Blum Family Foundation
12/10/2012	1840	Second Harvest Food Bank of Middle Tenn	-$500.00	Blum Family Foundation
12/10/2012	1835	Frist Center for the Visual Arts	-$400.00	Blum Family Foundation
12/10/2012	1836	Planned Parenthood of Middle & East Tennessee	-$500.00	Blum Family Foundation
12/10/2012	1837	Alive Hospice	-$1,000.00	Blum Family Foundation
12/10/2012	1841	Wellesley Centers for Women	-$500.00	Blum Family Foundation
12/10/2012	1842	Vanderbilt University School of Medicine	-$10,000.00	Blum Family Foundation
12/10/2012	1843	Friends of Monroe Carell Children's Hospital	-$250.00	Blum Family Foundation
12/10/2012	1849	Abe's Garden	-$1,000.00	Blum Family Foundation
12/13/2012	1850	The Doe Fund	-$150.00	Blum Family Foundation
12/13/2012	1853	CenterstonE	-$100.00	Blum Family Foundation
12/13/2012	1854	Mary Parrish Center	-$150.00	Blum Family Foundation
12/13/2012	1855	Seeds of Peace	-$500.00	Blum Family Foundation
12/13/2012	1856	Special Olympics Tennessee	-$35.00	Blum Family Foundation
12/13/2012	1860	Wall Street Synagogue	-$100.00	Blum Family Foundation
12/13/2012	1861	Southern Poverty Law Center	-$500.00	Blum Family Foundation
12/13/2012	1859	Youth Villages	-$100.00	Blum Family Foundation
12/14/2012	1877	The Schoolhouse	-$10,000.00	Blum Family Foundation

10/12/2012	1802	International Maine Coast Heritage Trust	Meyer Honor of Tom Haslett and Family	-$100.00	Blum Family Foundation
10/12/2012	1799	Habitat for Humanity		-$500.00	Blum Family Foundation
10/12/2012	1803	Magdalene, Inc		-$100.00	Blum Family Foundation
10/12/2012	1809	ELEM/Youth in Distress		-$250.00	Blum Family Foundation
10/12/2012	1810	Gordon JCC		-$350.00	Blum Family Foundation
10/12/2012	1805	COA		-$1,000.00	Blum Family Foundation
10/12/2012	1808	Symphony Ball 2012		-$250.00	Blum Family Foundation
10/12/2012	1811	South Africa Partners		-$200.00	Blum Family Foundation
10/12/2012	1812	Ballet Ball 2013		-$200.00	Blum Family Foundation
10/23/2012	1815	NCJW Celebration 32		-$350.00	Blum Family Foundation
10/23/2012	1816	University School of Nashville		-$4,000.00	Blum Family Foundation
10/23/2012	1817	Windward School		-$500.00	Blum Family Foundation
10/23/2012	1818	Vermont Works for Women		-$3,500.00	Blum Family Foundation
10/23/2012	1819	Fisk University		-$500.00	Blum Family Foundation
10/24/2012	1820	Lincoln Center Theater		-$1,280.00	Blum Family Foundation
10/30/2012	1821	Nashville Public Television		-$1,500.00	Blum Family Foundation
11/12/2012	1822	YWCA of Nashville and Middle Tennessee		-$100.00	Blum Family Foundation
12/4/2012	1824	Temple Ohabai Sholom		-$50.00	Blum Family Foundation
12/10/2012	1829	Homework Hotline, Inc.		-$400.00	Blum Family Foundation
12/10/2012	1830	Jewish Family Service		-$300.00	Blum Family Foundation
12/10/2012	1831	Nashville Publi(Radio		-$2,000.00	Blum Family Foundation
12/10/2012	1832	Vanderbilt Bill Wilkerson Center		-$300.00	Blum Family Foundation
12/10/2012	1833	J Street Education Foundation		-$2,000.00	Blum Family Foundation
12/10/2012	1834	Room in the In		-$1,000.00	Blum Family Foundation
12/10/2012	1838	The Belcourt		-$150.00	Blum Family

Split	Date	Check #	Payee	Tags	Amount	Account
	4/18/2012	1734	Seeds of Peace		-$1,000.00	Blum Family Foundation
	4/18/2012	1735	New York Philharmonic		-$1,000.00	Blum Family Foundation
	4/18/2012	1736	Learning Leaders		-$5,000.00	Blum Family Foundation
	4/18/2012	1737	The Hewitt School	Gift from Lauren Blum and William Merten	-$500.00	Blum Family Foundation
	5/11/2012	1756	American Jewish World Service		-$500.00	Blum Family Foundation
	5/31/2012	1762	Metropolitan Opera		-$1,000.00	Blum Family Foundation
	5/31/2012	1761	Central Synagogue		-$3,340.00	Blum Family Foundation
	9/14/2012	1787	Central Synagogue		-$1,200.00	Blum Family Foundation
	11/12/2012	1823	Learning Leaders		-$1,590.00	Blum Family Foundation
	12/14/2012	1862	92nd Street Y		-$1,000.00	Blum Family Foundation
	12/14/2012	1863	American Museum of Natural History		-$1,750.00	Blum Family Foundation
	12/14/2012	1864	Central Park Conservancy		-$250.00	Blum Family Foundation
	12/14/2012	1865	City Harvest		-$250.00	Blum Family Foundation
	12/14/2012	1866	Dalton School		-$500.00	Blum Family Foundation
	12/14/2012	1867	Dartmouth Alumni Fund		-$1,000.00	Blum Family Foundation
	12/14/2012	1869	Harvard College Fund		-$3,000.00	Blum Family Foundation
	12/14/2012	1868	The Hewitt School		-$4,000.00	Blum Family Foundation
	12/14/2012	1871	Learning Leaders		-$5,000.00	Blum Family Foundation
	12/14/2012	1872	Lymphoma Foundation		-$250.00	Blum Family Foundation
	12/14/2012	1873	Massachusetts Institute of Technology		-$1,000.00	Blum Family Foundation
	12/14/2012	1874	Metropolitan Opera		-$5,000.00	Blum Family Foundation
	12/14/2012	1875	New Israel Fund		-$750.00	Blum Family Foundation
	12/14/2012	1876	New York		-$5,000.00	Blum Family

		Philharmonic		Foundation
12/14/2012	1883	New York Public Library	-$250.00	Blum Family Foundation
12/14/2012	1884	New Yorkers for Parks	-$250.00	Blum Family Foundation
12/14/2012	1885	Planned Parenthood of NYC	-$250.00	Blum Family Foundation
12/14/2012	1893	Summer Science Program	-$250.00	Blum Family Foundation
12/14/2012	1894	Technoserve	-$500.00	Blum Family Foundation
12/14/2012	1895	The Doe Fund	-$500.00	Blum Family Foundation
12/14/2012	1896	The Maritime Aquarium	-$100.00	Blum Family Foundation
12/14/2012	1897	Vermont Works for Women	-$500.00	Blum Family Foundation
12/14/2012	1889	WNET	-$150.00	Blum Family Foundation
12/14/2012	1898	Yale University	-$1,000.00	Blum Family Foundation

Split	Date	Check #	Payee	Tags	Amount	Account
	3/20/2012	1709	Maine Seacoast Mission		-$5,000.00	Blum Family Foundation
	5/11/2012	1755	350.org		-$10,000.00	Blum Family Foundation
	12/10/2012	1847	Environmental Defense		-$2,500.00	Blum Family Foundation
	12/10/2012	1848	Partners in Health		-$2,500.00	Blum Family Foundation

Split	Date	Check #	Payee	Tags	Amount	Account
	2/7/2012		Windward School	For Cotsens - Spring Event	-$1,500.00	Blum Family Foundation
	2/7/2012		Wellesley College		-$2,500.00	Blum Family Foundation
	5/27/2012	1750	Harvard College Fund		-$1,500.00	Blum Family Foundation
	5/27/2012	1757	Echo Horizon School	In honor of Julia Cotsen	-$500.00	Blum Family Foundation
	7/10/2012	1772	Wilshire Boulevard Temple	the Blum-Cotsen Family	-$3,000.00	Blum Family Foundation
	10/13/2012	1813	Windward School		-$5,000.00	Blum Family Foundation
	12/10/2012	1826	Echo Horizon School		-$1,500.00	Blum Family Foundation
	12/10/2012	1827	Nichols School		-$200.00	Blum Family Foundation
	12/10/2012	1828	Wellesley College		-$2,500.00	Blum Family Foundation

Split	Date	Check #	Payee	Tags	Amount	Account
	7/3/2012	1769	Learning Leaders		-$25,000.00	Blum Family Foundation

THE BLUM FAMILY FOUNDATION 62-1871174

Form **990-W** (Worksheet)
Department of the Treasury Internal Revenue Service

Estimated Tax on Unrelated Business Taxable Income for Tax-Exempt Organizations

(and on Investment Income for Private Foundations) FORM 990-PF

(Keep for your records. Do not send to the Internal Revenue Service.)

OMB No. 1545-0976

2013

1	Unrelated business taxable income expected in the tax year	1	
2	**Tax on the amount on line 1.** See instructions for tax computation	2	
3	Alternative minimum tax (see instructions)	3	
4	Total. Add lines 2 and 3	4	
5	Estimated tax credits (see instructions)	5	
6	Subtract line 5 from line 4	6	
7	Other taxes (see instructions)	7	
8	Total Add lines 6 and 7	8	
9	Credit for federal tax paid on fuels (see instructions)	9	
10a	Subtract line 9 from line 8. **Note.** If less than $500, the organization is not required to make estimated tax payments. Private foundations, see instructions — 10a		
b	Enter the tax shown on the 2012 return (see instructions). **Caution.** If zero or the tax year was for less than 12 months, skip this line and enter the amount from line 10a on line 10c — 10b: 2,263.		
c	**2013 Estimated Tax.** Enter the smaller of line 10a or line 10b. If the organization is required to skip line 10b, enter the amount from line 10a on line 10c ADJUSTED TO	10c	2,264.

			(a)	(b)	(c)	(d)
11	**Installment due dates** (see instructions)	11	05/15/13	06/17/13	09/16/13	12/16/13
12	**Required installments.** Enter 25% of line 10c in columns **(a)** through **(d)** unless the organization uses the annualized income installment method, the adjusted seasonal installment method, or is a "large organization" (see instructions)	12	566.	566.	566.	566.
13	**2012 Overpayment** (see instructions)	13				
14	**Payment due.** (Subtract line 13 from line 12.)	14				

ESTIMATED TAX	2,264.
OVERPAYMENT APPLIED	2,708.
AMOUNT DUE	0.

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

Application for Extension of Time To File an Exempt Organization Return

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

OMB No. 1545-1709

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

Do not complete Part II unless you have already been granted an automatic 3-month 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.

Type or print		
File by the due date for filing your return See instructions	Name of exempt organization or other filer, see instructions. THE BLUM FAMILY FOUNDATION	Employer identification number (EIN) or 62-1871174
	Number, street, and room or suite no. If a P O box, see instructions. 909 BOWRING PARK	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. NASHVILLE, TN 37215-2456	

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

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-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

- The books are in the care of ▶ JOAN B. SHAYNE 909 BOWRING PARK - NASHVILLE, TN 37215-2456
  Telephone No ▶ (615) 383-4965 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 AUGUST 15, 2013, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
▶ [X] 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	$ 4,971.
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	$ 1,971.
c	**Balance due.** Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	3c	$ 3,000.

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

LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.** Form **8868** (Rev 1-2013)

223841
01-21-13

13480807 099909 BLU1174NSH 2012.04010 THE BLUM FAMILY FOUNDATION BLU11741