



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



Form

990-PF

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 04-01-2012 , and ending 03-31-2013

Name of foundation TRIUMPH GROUP CHARITABLE FDN		A Employer identification number 26-3937598	
Number and street (or P O box number if mail is not delivered to street address) 899 CASSATT ROAD SUITE 210		B Telephone number (see instructions) (610) 251-1000	
City or town, state, and ZIP code BERWYN, PA 19312		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 4,863,080		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) (Part I, column (d) must be on cash basis.)			


Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	2,000,000			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	56,944	56,534		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	166,625			
	b Gross sales price for all assets on line 6a _____ 1,628,345				
	7 Capital gain net income (from Part IV, line 2)		166,625		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	2,223,569	223,159		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule)				0
	b Accounting fees (attach schedule)	500	500	0	0
	c Other professional fees (attach schedule)	45,513	40,962		4,551
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	2,893	1,552		0
	19 Depreciation (attach schedule) and depletion . . .	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings		0	0	
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule)	15			15
	24 Total operating and administrative expenses. Add lines 13 through 23	48,921	43,014	0	4,566
	25 Contributions, gifts, grants paid	85,000			85,000
	26 Total expenses and disbursements. Add lines 24 and 25	133,921	43,014	0	89,566
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	2,089,648			
	b Net investment income (if negative, enter -0-)		180,145		
	c Adjusted net income (if negative, enter -0-)			0	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		1,450	1,450
	2	Savings and temporary cash investments	204,281	648,574	648,574
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0	0
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____ 0			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,338,495 	1,600,491	1,748,468
	c	Investments—corporate bonds (attach schedule).	713,863 	1,629,917	1,638,668
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	303,110 	766,534	825,920
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,559,749	4,646,966	4,863,080

Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	

Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	2,559,749	4,646,966	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	2,559,749	4,646,966	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,559,749	4,646,966	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	2,559,749
2	Enter amount from Part I, line 27a	2	2,089,648
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	4,649,397
5	Decreases not included in line 2 (itemize) ▶ _____ 	5	2,431
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	4,646,966

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

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

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

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

2	Capital gain net income or (net capital loss)	<div><div>If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</div></div>	2	166,625
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) <div>If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8</div>		3	

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2011	156,967	2,506,876	0 062615
2010	113,789	1,969,009	0 05779
2009	50,181	1,661,757	0 030198
2008	0	7,944	0 0
2007			

2	Total of line 1, column (d).	2	0 150603
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 037651
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	4,070,954
5	Multiply line 4 by line 3.	5	153,275
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,801
7	Add lines 5 and 6.	7	155,076
8	Enter qualifying distributions from Part XII, line 4. 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	8	89,566

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1			
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	3,603
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	3,603
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	3,603
6		Credits/Payments			
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a	1,204	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c	0	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments Add lines 6a through 6d.		7	1,204
8		Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8	0
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	2,399
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	
11		Enter the amount of line 10 to be Credited to 2013 estimated tax 0	Refunded	11	0

Part VII-AStatements Regarding Activities

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?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either <ul style="list-style-type: none">By language in the governing instrument, orBy state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) PA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	Yes	

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address				
14	The books are in care of KEVIN E KINDIG VP ASST TRS Telephone no (610) 251-1000 Located at 899 CASSATT ROAD SUITE 210 BERWYN PA ZIP +4 19312			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

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

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

Organizations relying on a current notice regarding disaster assistance check here.

☒

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

Part VIII

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

1

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

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

2

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

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

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

0

Form 990-PF (2012)

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

Total number of others receiving over \$50,000 for professional services.	0
--	---

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

Total. Add lines 1 through 3.

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	3,231,889
b	Average of monthly cash balances.	1b	901,059
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	4,132,948
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	4,132,948
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	61,994
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,070,954
6	Minimum investment return. Enter 5% of line 5.	6	203,548

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	203,548
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	3,603
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	3,603
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	199,945
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	199,945
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	199,945

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	89,566
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	89,566
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	89,566
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				199,945
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.			0	
b Total for prior years 2010 , 20__ , 20__		0		
3 Excess distributions carryover, if any, to 2012				
a From 2007.				0
b From 2008.				0
c From 2009.				0
d From 2010.				0
e From 2011.				18,606
f Total of lines 3a through e.	18,606			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 89,566				
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.				89,566
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	18,606			18,606
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				91,773
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2008. . . .				0
b Excess from 2009. . . .				0
c Excess from 2010. . . .				0
d Excess from 2011. . . .				0
e Excess from 2012. . . .				0

Part XIV

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

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

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

NONE

b

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

NONE

2

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

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

a

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

JOHN B WRIGHT III
899 CASSATT ROAD STE 210
BERWYN,PA 19312
(610) 251-1000

b

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

WRITTEN APPLICATION SPECIFIC FORM BEING DEVELOPED AT THIS TIME

c

Any submission deadlines

OPEN

d

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

NOT AT THIS TIME

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Form **990-PF** (2012)

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	56,944	
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	166,625	
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). .				223,569	
13 Total. Add line 12, columns (b), (d), and (e).				223,569	223,569

[illegible]

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
25000 CRED SUIS NY MTN 3 450% 7/02/12		2010-02-17	2012-07-02
25000 ATT INC 5 500% 2/01/18		2010-02-26	2012-08-02
25000 CISCO SYSTEMS 4 450% 1/15/20		2010-02-18	2012-08-02
25000 COCA COLA CO 4 875% 3/15/19		2010-02-18	2012-08-02
25000 PEPSICO INC 4 500% 1/15/20		2010-02-18	2012-08-02
350 EATON CORP		2012-03-14	2012-08-15
25000 HEWLETT PACK CO 2 950% 8/15/12		2010-02-22	2012-08-15
215 ALBEMARLE CORP		2012-03-14	2012-09-21
274 ALLERGAN INC		2010-02-17	2012-09-21
474 ARM HLDGS PLC A D R		2011-02-18	2012-09-21
286 B/E AEROSPACE INC		2012-03-14	2012-09-21
190 BIOGEN IDEC INC		2010-02-17	2012-09-21
175 CANADIAN NATL RY CO COM		2012-03-14	2012-09-21
172 CITRIX SYS INC		2012-03-14	2012-09-21
225 CITRIX SYS INC		2010-02-17	2012-09-21
764 DARLING INTL INC		2012-03-14	2012-09-21
147 DASSAULT SYSTEMES SA A D R		2011-02-18	2012-09-21
776 DIGITAL RIVER INC		2012-03-14	2012-09-21
762 E M C CORP MASS		2010-02-17	2012-09-21
69 ENERGIZER HOLDINGS INC		2010-02-17	2012-09-21
273 ENERGIZER HOLDINGS INC		2011-09-06	2012-09-21
406 FOREST LABS INC		2012-03-14	2012-09-21
388 FOREST LABS INC		2011-09-06	2012-09-21
165 FRANKLIN RES INC		2011-07-28	2012-09-21
221 GILEAD SCIENCES INC		2010-02-17	2012-09-21
615 HOYA CORP A D R		2012-03-14	2012-09-21
819 INTEL CORP		2012-03-14	2012-09-21
1020 JUPITER TELECOM A D R		2011-02-18	2012-09-21
295 KENNAMETAL INC		2012-03-14	2012-09-21
580 LOREAL UNSPONSORED A D R		2012-03-14	2012-09-21

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
492 LOWE'S COS INC		2012-03-14	2012-09-21
310 MADDEN STEVEN LTD		2012-03-14	2012-09-21
418 MONSTER BEVERAGE CORP		2010-08-17	2012-09-21
222 NESTLE S A SPONSORED ADR REPSTG REG SH		2012-03-14	2012-09-21
498 ORACLE CORPORATION		2012-03-14	2012-09-21
485 PARAMETRIC TECHNOLOGY CORP		2012-03-14	2012-09-21
200 POLARIS INDS INC		2012-03-14	2012-09-21
28 PRICELINE COM INC		2012-03-14	2012-09-21
571 PROGRESS SOFTWARE CORP		2012-03-14	2012-09-21
240 QUALCOMM INC		2010-08-17	2012-09-21
259 QUALCOMM INC		2011-09-06	2012-09-21
188 RALCORP HOLDINGS INC		2012-03-14	2012-09-21
370 RAYMOND JAMES FINL INC		2012-03-14	2012-09-21
400 SPDR S&P 500 ETF TRUST		2012-05-18	2012-09-21
245 SAP AG A D R		2012-03-14	2012-09-21
266 SASOL LTD SPONSORED A D R		2012-03-14	2012-09-21
101 SCHLUMBERGER LTD		2010-02-17	2012-09-21
173 SCHLUMBERGER LTD		2011-09-06	2012-09-21
3766 TURKIYE GARANTI BANKASI A S A D R		2012-03-14	2012-09-21
468 UNITED HEALTH GROUP INCORPORATED		2010-02-17	2012-09-21
425 WAL MART DE MEXICO SAB DE CV A D R		2012-03-14	2012-09-21
336 WATTS WATER TECHNOLOGIES CL A		2012-03-14	2012-09-21
187 WEIGHT WATCHERS INTL INC		2012-03-14	2012-09-21
112 HERBALIFE LTD		2010-10-11	2012-09-21
233 HERBALIFE LTD		2011-09-06	2012-09-21
412 SENSATA TECHNOLOGIES HOLDING		2011-09-06	2012-09-21
364 AVAGO TECHNOLOGIES		2012-03-14	2012-09-21
25000 GEN ELEC CAP M T N 2 800% 1/08/13		2010-02-17	2013-01-08
25000 BARCLAYS BK PLC 2 500% 1/23/13		2010-03-02	2013-01-23
539 SHAW GROUP INC		2012-09-21	2013-02-13

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
647 ALIGN TECHNOLOGY INC		2012-09-21	2013-02-22
110 ALLIANCE DATA SYSTEMS CORP		2012-03-14	2013-02-22
487 ANN INC		2012-03-14	2013-02-22
1217 CBRE GROUP INC		2012-09-21	2013-02-22
344 561 CHICAGO BRIDGE IRON NY SHS		2011-07-28	2013-02-22
69 439 CHICAGO BRIDGE IRON NY SHS		2013-02-13	2013-02-22
1583 DYCOM INDS INC		2012-09-21	2013-02-22
512 ERSTE GROUP BANK AG A D R		2010-02-17	2013-02-22
2381 ERSTE GROUP BANK AG A D R		2011-09-06	2013-02-22
966 FIFTH THIRD BANCORP		2012-03-14	2013-02-22
342 GENESCO INC		2012-09-21	2013-02-22
983 JDS UNIPHASE CORP		2012-03-14	2013-02-22
1036 PETROLEO BRASILEIRO SPON A D R		2012-09-21	2013-02-22
323 PETROLEO BRASILEIRO SPON A D R		2011-02-18	2013-02-22
553 PRINCIPAL FINANCIAL GROUP INC		2011-09-06	2013-02-22
1281 PRINCIPAL FINANCIAL GROUP INC		2012-09-21	2013-02-22
429 PRINCIPAL FINANCIAL GROUP INC		2010-02-17	2013-02-22
2707 QUIKSILVER INC		2012-09-21	2013-02-22
3260 QUIKSILVER INC		2011-09-06	2013-02-22
123 REGENERON PHARMACEUTICALS INC		2012-03-14	2013-02-22
90 SALESFORCE COM INC		2012-03-14	2013-02-22
800 ENERGY SELECT SECTOR SPDR FD		2012-11-16	2013-02-22
2500 STAPLES INC		2012-08-15	2013-02-22
1490 TEREX CORP NEW		2012-09-21	2013-02-22
869 USG CORP		2012-03-14	2013-02-22
134 USG CORP		2012-09-21	2013-02-22
280 UNDER ARMOUR INC CL A		2012-03-14	2013-02-22
439 CHICAGO BRIDGE IRON NY SHS		2011-07-28	2013-02-25

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
25,000		25,832	-832
30,235		26,613	3,622
29,445		24,579	4,866
30,081		25,987	4,094
29,341		25,031	4,310
15,921		17,719	-1,798
25,000		26,086	-1,086
11,526		13,732	-2,206
25,084		16,450	8,634
13,376		14,462	-1,086
12,149		13,642	-1,493
29,476		10,670	18,806
15,521		13,713	1,808
13,997		13,540	457
18,310		9,814	8,496
13,958		13,454	504
16,023		11,260	4,763
13,176		13,704	-528
21,397		13,288	8,109
5,229		3,865	1,364
20,688		19,615	1,073
14,506		13,812	694
13,863		12,905	958
20,714		21,702	-988
14,955		10,826	4,129
14,126		13,801	325
18,952		22,875	-3,923
10,016		10,835	-819
11,204		13,791	-2,587
14,587		13,624	963

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
14,627		14,942	-315
13,098		13,732	-634
22,752		9,396	13,356
14,159		13,546	613
16,230		15,030	1,200
11,184		13,755	-2,571
16,420		13,614	2,806
17,899		18,190	-291
11,785		13,640	-1,855
15,427		9,535	5,892
16,648		12,739	3,909
13,656		13,904	-248
13,938		13,464	474
58,479		52,148	6,331
17,924		17,312	612
12,005		13,452	-1,447
7,564		6,606	958
12,956		12,636	320
15,817		14,235	1,582
26,077		15,513	10,564
12,014		13,872	-1,858
13,047		13,711	-664
10,010		15,121	-5,111
5,297		3,644	1,653
11,020		12,815	-1,795
12,752		12,609	143
12,882		13,737	-855
25,000		25,124	-124
25,000		25,050	-50
25,662		23,635	2,027

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
20,571		24,489	-3,918
16,822		13,636	3,186
13,227		13,548	-321
28,872		23,841	5,031
18,517		14,253	4,264
3,732		3,650	82
33,677		23,982	9,695
7,936		9,810	-1,874
36,905		38,685	-1,780
15,177		13,505	1,672
20,753		23,404	-2,651
14,323		13,535	788
17,816		23,755	-5,939
5,555		10,775	-5,220
17,385		12,531	4,854
40,273		35,919	4,354
13,487		9,866	3,621
16,082		9,501	6,581
19,367		12,584	6,783
19,449		13,858	5,591
15,317		13,626	1,691
62,103		55,176	6,927
32,800		27,720	5,080
48,148		35,532	12,616
23,907		13,600	10,307
3,686		3,200	486
13,250		13,787	-537
23		18	5

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-832
			3,622
			4,866
			4,094
			4,310
			-1,798
			-1,086
			-2,206
			8,634
			-1,086
			-1,493
			18,806
			1,808
			457
			8,496
			504
			4,763
			-528
			8,109
			1,364
			1,073
			694
			958
			-988
			4,129
			325
			-3,923
			-819
			-2,587
			963

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-315
			-634
			13,356
			613
			1,200
			-2,571
			2,806
			-291
			-1,855
			5,892
			3,909
			-248
			474
			6,331
			612
			-1,447
			958
			320
			1,582
			10,564
			-1,858
			-664
			-5,111
			1,653
			-1,795
			143
			-855
			-124
			-50
			2,027

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-3,918
			3,186
			-321
			5,031
			4,264
			82
			9,695
			-1,874
			-1,780
			1,672
			-2,651
			788
			-5,939
			-5,220
			4,854
			4,354
			3,621
			6,581
			6,783
			5,591
			1,691
			6,927
			5,080
			12,616
			10,307
			486
			-537
			5

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RICHARD C ILL	PRESIDENT 25	0		
899 CASSATT ROAD SUITE 210 BERWYN,PA 19312				
M DAVID KORNBLATT	VICE PRES/TREASURER 25	0		
899 CASSATT ROAD SUITE 210 BERWYN,PA 19312				
JOHN B WRIGHT II	VICE PRES/SECRETARY 25	0		
899 CASSATT ROAD SUITE 210 BERWYN,PA 19312				
KEVIN E KINDIG	VICE PRES ASST TREAS 12	0		
899 CASSATT ROAD SUITE 210 BERWYN,PA 19312				
SHEILA G SPAGNOLO	VICE PRESIDENT 12	0		
899 CASSATT ROAD SUITE 210 BERWYN,PA 19312				
JAMES H DECKER	ASST SECRETARY 12	0		
899 CASSATT ROAD SUITE 210 BERWYN,PA 19312				

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2012

Name of the organization TRIUMPH GROUP CHARITABLE FDN	Employer identification number 26-3937598
---	---

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)() (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33¹/₃% 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 TRIUMPH GROUP CHARITABLE FDN	Employer identification number 26-3937598
---	---

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
<u>1</u>	TRIUMPH GROUP INC 899 CASSATT RD SUITE 210 BERWYN, PA 19312	\$ 2,000,000	<div>Person <input checked="" type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II if there is a noncash contribution)</div>
 		\$	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II if there is a noncash contribution)</div>
 		\$	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II if there is a noncash contribution)</div>
 		\$	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II if there is a noncash contribution)</div>
 		\$	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II if there is a noncash contribution)</div>
 		\$	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II if there is a noncash contribution)</div>
 		\$	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II if there is a noncash contribution)</div>

Name of organization TRIUMPH GROUP CHARITABLE FDN	Employer identification number 26-3937598
---	---

Part II	Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed		
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____

Name of organization TRIUMPH GROUP CHARITABLE FDN	Employer identification number 26-3937598
---	---

Part III

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ▶ \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

TY 2012 Accounting Fees Schedule

Name: TRIUMPH GROUP CHARITABLE FDN

EIN: 26-3937598

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
US BANK - TAX PREPARATION FEE	500	500		

TY 2012 Investments Corporate
 Bonds Schedule

Name: TRIUMPH GROUP CHARITABLE FDN
 EIN: 26-3937598

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CREDIT SUISSE NY 3.450 7/2/12		
HEWLETT PACKARD 2.95 8/15/12		
GENERAL ELEC CAP 2.80 1/08/13		
PRAXAIR INC. 2.125 6/14/13	25,200	25,088
WELLS FARGO CO. 3.75% 10/1/14	25,473	26,179
SOUTHERN CA EDISON 4.65 4/1/15	26,940	26,981
NOVARTIS CAP. CORP 2.9 4/24/15	25,052	26,219
BOEING CO. 3.75 11/20/16	25,311	27,254
GOLDMAN SACHS 5.95 1/18/18	26,362	29,148
ATT INC. 5.5 2/1/2018		
COCA COLA CO 4.875 3/15/19		
CISCO SYSTEMS 4.45 1/15/20		
PEPSICO INC. 4.5 1/15/2020		
BARCLAYS BANK 2.5 01/23/2013		
BP CAPITAL MKTS 3.625 5/8/14	25,933	25,827
TOTAL CAPITAL 3.125 10/5/2015	24,897	26,457
BHP BILLITON FIN. 5.4 3/29/17	26,712	28,967
ONTARIO PROV. 4.0 10/7/2019	24,465	28,521
MICROSOFT CORP .875% 9/27/13	100,770	100,279
IBM CORP 1.250% 5/12/14	50,845	50,528
PROCTOR & GAMBLE .7% 8/15/14	50,359	50,276
TOYOTA MOTOR CR 1.25% 11/17/14	101,484	101,249
COLGATE PALMOLIVE 1.375% 11/15	50,874	50,956
BERKSHIRE HATHWY FIN 1.5% 1/14	101,545	100,907
TARGET CORP. 1.125% 7/18/14	101,661	101,042
PEPSICO INC. .8% 8/25/14	100,858	100,561
PACCAR FIN.CORP 1.55% 9/29/14	102,242	101,681
VERIZON COMM. 1.25% 11/30/14	101,849	101,235
INTEL CORP. 1.95% 10/1/16	103,881	103,590
ATT INC. 1.6% 2/15/17	100,756	101,222

Name of Bond	End of Year Book Value	End of Year Fair Market Value
WALT DISNEY CO 1.125% 2/15/17	101,281	100,075
SANOFI 1.2% 9/30/14	101,775	101,080
STATOIL ASA 1.8% 11/23/16	103,392	103,346

TY 2012 Investments Corporate
Stock Schedule

Name: TRIUMPH GROUP CHARITABLE FDN
EIN: 26-3937598

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALBEMARLE CORP. 215 SH		
ALLERGAN INC. 274 SH		
BIOGEN IDEC INC. 190 SH		
CITRIX SYS INC. 408 SH	29,612	29,437
E BAY INC. 1367 SH	46,890	74,119
E M C CORP. 1026 SH	24,152	24,511
ENERGIZER HOLDINGS 342 SH		
GILEAD SCIENCES INC. 221 SH		
GOOGLE INC. CL A 61 SH	32,408	48,445
INTEL CORP. 819 SH		
JABIL CIRCUIT INC. 1166 SH		
JACOBS ENGR GROUP 668 SH	29,077	37,568
MADDEN STEVEN LTD. 310 SH		
MASTERCARD INC. 145 SH	50,647	78,464
ORACLE CORP. 498 SH		
PEGASYSTEMS INC. 57 SH	2,059	1,601
POLARIS INDS INC. 200 SH		
PRINCIPAL FINL GROUP 982 SH		
PROGRESS SOFTWARE 571 SH		
QUALCOMM INC. 371 SH	24,067	24,835
RALCORP HLDGS INC 188 SH		
SALESFORCE COM INC 90 SH		
TEMPUR PEDIC INTL INC 174 SH	9,739	8,636
UNITED HEALTH GROUP 468 SH		
WATTS WATER TECH 336 SH		
ALLIANZ SE ADR 3141 SH	34,650	42,718
ARM HLDGS PLC ADR 575 SH	24,546	24,363
DASSAULT SYSTEMES SA ADR 147		
ERSTE GROUP BANK AD ADR 2893		
FANUC LTD 897 SH	23,104	23,062

Name of Stock	End of Year Book Value	End of Year Fair Market Value
HERBALIFE LTD 345 SH		
I C I C I BANK LTD ADR 1213 SH	49,328	52,038
JUPITER TELECOM ADR 153 SH		
LOGITECH INTL SA 547 SH	10,513	3,813
LOREAL CO UNSPONS.ADR 580 SH		
LVMH MOET HENNESSY LOU VUITT	10,704	11,580
NESTLE SA SPSD ADR 222 SH		
PETROLEO BRASILEIRO 323 SH		
SAP AG ADR 245 SH		
SASOL LTD SPSD ADR 266 SH		
SCHLUMBERGER LTD 311 SH	24,025	23,291
SCHNEIDER ELECT SA UNSP 1700SH	22,477	24,905
SENSATA TECH. HLDGS 412 SH		
WAL MART DE MEXICO SAB 425 SH		
A T M I INC. 1122 SHARES	18,320	25,166
ALLIANCE DATA SYS. 110 SH		
ANN INC. 487 SH		
B E AEROSPACE INC. 286 SH		
BRUNSWICK CORP. 553 SH	13,864	18,924
CBS CORP CL B 1658 SHARES	52,733	77,412
DARLING INTL INC. 764 SH		
DIGITAL RIVER INC. 776 SH		
EATON CORP. 350 SH		
EXPEDIA INC. 634 SH	31,079	38,050
FIFTH THIRD BANCORP 966 SH		
FOREST LABS INC. 775 SH	28,434	29,481
FRANKLIN RES INC. 165 SH		
JDS UNIPHASE CORP. 983 SH		
KENNAMETAL INC. 295 SH		
KEY ENERGY SERV. INC. 3564 SH	36,486	28,797

Name of Stock	End of Year Book Value	End of Year Fair Market Value
LOWES CO INC. 492 SH		
MONSTER BEVERAGE 418 SH		
NVIDIA CORP. 1839 SH	28,081	23,594
PARAMETRIC TECH CORP 485 SH		
PRICELINE COM INC. 28 SH		
QUIKSILVER INC. 3981 SH	13,973	24,165
RAYMOND JAMES FINL 370 SH		
REGENERON PHARM. 123 SH		
TENNECO AUTOM. INC. 344 SH	13,693	13,523
TEREX CORP NEW 757 SH	17,126	26,056
UNDER ARMOUR INC 140 SH		
USG CORP 887 SH	21,181	23,452
WEIGHT WATCHERS INTL 187 SH		
ALCATEL LUCENT ADR 1809 SH	10,366	2,406
AMERICA MOVIL ADR 370 SH	10,400	7,755
AVAGO TECHNOLOGIES 364 SH		
CANADIAN NATL RY CO 175 SH		
CHICAGO BRIDGE IRON NY 345 SH		
CSL LIMITED ADR 774 SH	13,746	24,087
HOYA CORP ADR 615 SH		
ITAU UNIBANCO HLDGS 2041 SH	38,342	36,330
JGC CORP UNSPND ADR 420 SH	22,470	21,563
TURKIYE GARANTI BANKASI 3766		
ALLSTATE CORP. 1236 SH	57,743	60,651
AMAG PHARM. 1351 SH	23,717	32,221
AMERICAN EAGLE OUTFIT, 1165 SH	23,816	21,786
AMERICAN SUPERCOND. 6038 SH	23,813	16,121
APPLE INC. 84 SH	41,868	37,183
CACHE INC. 7378 SH	25,309	31,135
CHICOS FAS INC. 1263 SH	23,795	21,218

Name of Stock	End of Year Book Value	End of Year Fair Market Value
COCA COLA CO. 500 SH	18,460	20,220
CYTOKINETICS INC. 28,794 SH	26,721	32,825
EXPRESS SCRIPTS HLDGS 460 SH	25,769	26,505
HUDSON GLOBAL INC. 5293 SH	24,215	20,854
JABIL CIRCUIT INC. 2242 SH	41,636	41,432
KONA GRILL INC. 2807 SH	23,566	25,628
MERCURY SYS. INC. 2230 SH	24,189	16,435
MICROSOFT CORP. 2500 SH	69,275	71,513
MODUSLINK GLOBAL SOL. 6164 SH	24,531	20,341
MONDELEX INTERN'L 700 SH	18,536	21,431
PERFICIENT INC. 2082 SH	23,906	24,276
QUANTA SVCS INC. 845 SH	24,268	24,150
R T I INTL METALS INC. 978 SH	23,755	30,993
SONUS NETWORKS INC. 11,242 SH	24,373	29,117
TRIQUINT SEMICOND. 4239 SH	23,738	21,449
URBAN OUTFITTERS 597 SH	23,808	23,128
WILLIAMS SONOMA INC. 529 SH	24,154	27,254
BUNGE LIMITED 327 SH	23,907	24,142
EATON CORP PLC 404 SH	24,179	24,745
MTN GROUP LTD ADR 1208 SH	24,885	21,418
SUNOPTA INC. 3632 SH	24,267	26,150

TY 2012 Investments - Other Schedule**Name:** TRIUMPH GROUP CHARITABLE FDN**EIN:** 26-3937598

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
IPATH DOW JONES UBS COMMODITY	AT COST	114,008	109,105
ISHARES TR IBOXX H Y CORP BD	AT COST	189,102	207,570
ISHARES DJ SELECT DIVIDEND ETF	AT COST	99,954	114,120
ISHARES DJ US REAL ESTATE ETF	AT COST	159,925	173,700
ISHARES MSCI EMERGING MKTS ETF	AT COST	75,850	85,540
SPDR GOLD TRUST	AT COST	76,110	77,235
UTILITIES SELECT SECTOR SPDR	AT COST	51,585	58,650

TY 2012 Other Decreases Schedule

Name: TRIUMPH GROUP CHARITABLE FDN

EIN: 26-3937598

Description	Amount
MUTUAL FUND POSTINGS NOT ON YEAR END STATEMENT	2,431

TY 2012 Other Expenses Schedule

Name: TRIUMPH GROUP CHARITABLE FDN

EIN: 26-3937598

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PA BUREAU OF CHAR ORGANIZATION	15	0		15

TY 2012 Other Professional Fees Schedule

Name: TRIUMPH GROUP CHARITABLE FDN

EIN: 26-3937598

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
US BANK - AGENCY FEES	45,513	40,962		4,551

TY 2012 Substantial Contributors Schedule

Name: TRIUMPH GROUP CHARITABLE FDN

EIN: 26-3937598

Name	Address
TRIUMPH GROUP INC	899 CASSATT RD SUITE 210 BERWYN,PA 19312

TY 2012 Taxes Schedule**Name:** TRIUMPH GROUP CHARITABLE FDN**EIN:** 26-3937598

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES/ADR FEES PAID	1,552	1,552		0
2012 FEDERAL EXCISE TAX	137	0		0
2013 FEDERAL EXCISE TAX ESTIMA	1,204	0		0