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# EXTENDED TO NOVEMBER 15, 2013 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 Open to public Inspection

For eathered syster 2012 or tax year beginning APR 1, 2012 and ending MAR 31, 2013  Name of loundation  THE JULIUS AND BERTHA ORTH POUNDATION  A5 -0427503  Reminder of the property identification number  45 -0427503  Reminder of the property identification number  45 -0427503  Reminder of the property identification number  45 -0427503  Reminder of the property identification number  952-432-0515  Correspondence periodic, disease and property in the property			of the Treasury enue Service	No	ote. The fou	ndatio	n mav l	<b>i reate</b> ne able t	e <b>d as a l</b> o use a con	<b>Privat</b> v of this	<b>e Founda</b> return to sati	<b>ation</b> sfy state repo	rtına red	uiremen	ts.	<del> </del>	pen to public	Inspection
Remboyer identification number   As										<i>y</i> 01 tino							poi. to passe	HISPOSTOTI
Reconsider   PO SBOX 162   10 the content of mail is not delivered to steed addresse)   PO SBOX 162   10 the content of the				,	209		<u> </u>	-,	2012		,						ber	
PO BOX 162   952-432-0515   0   ##   ##   ##   ##   ##   ##   ##	T	HE	JULIUS	AND	<u>BE</u> RTH	A O	RTH	FOU	JNDATI	ON			4	5-04	27503			
Cy or from, Satte, and 2 Prode  ROSEMOUNT. MN 50.68  6 Check all that apply: Initial return Initial Ini			-	number if	mail is not de	livered	to street	address)		_		Room/suite				15		
ROSEMOUNT, MN 55068 6 Check all mat apply: Intelligent the property of the pro				2 code			···					<u> </u>						
Final return   Amended return   Amende	-				55068								U IT exe	mption ap	plication is p	enainç	), check here	
Check type of organization:   Section 507(b)(3) example private foundation   Southon 497(b)(1) neneering the first bill by the fixed	G C	heck	all that apply:		Initial return	า			Initial retui	rn of a fo	rmer public o	charity	D 1. F	oreign or	ganizations	s, che	ck here	
H Check type of organization: X Section 501(c)(3) exempt private foundation Section 4947(3)(1) nonexempt charitable thrus: Chert totable private foundation I Farr market value of all assets at end of year J Accounting method: X Cash Accrual (from Part III, col. (c), lun 16) S 602, 307. (Fart I. column (f) must be on cash basis:) Fart II Analysis of Revenue and Expenses (the basis of disvolues of all supplies of the value of all supplies of all supplies of the value of all supplies of									i .				2. F	oreigņ orga	nizations me	eting t	the 85% test,	_
Section 4947(a)(1) nonexempt charable trust	<del></del> С	heck	type of organizati				c)(3) ex	empt pr					1					
Farr market value of all assets at end of year   J Accounting method:   X Cash		_									ation							
Contributions and interest from securities   17,002.	I Fa							ng meth	od: X	Cash	Accr	rual	1					nation
Part II   Analysis of Revenue and Expenses (a) Revenue and rincome   (a) Agusted net income   (b) Agusted net income   (c) Agusted net income   (c) Agusted net income   (d) Deburements frecessarily squal the amount on odurnal (d)   (e) Agusted net income   (e) Agusted net income   (f) Agusted				ne 16)														
The total of amounts in colomma (b) (c), and (d) may not necessary in colomma (b) (c), and (d) may not necessary in colomma (b) (c), and (d) may not necessary in colomma (b) (c) and (d) may not necessary in colomma (b) (c) and (d) may not necessary in colomma (c) (c) and (d) may not necessary in colomma (c) (c) and (d) may not necessary in colomma (c) (c) and (d) may not necessary in colomma (c) (c) and (d) may not necessary in colomma (c) (c) and (d) may not necessary in colomma (c) (c) and (d) may not necessary in colomma (c) (c) and (d) may not necessary in colomma (c)	-		, ,	602	307.	(Part	I, colu	mn (d)	must be o	n cash l	basis.)							
1 Contributions, gifts, grants, etc., received 2 Chear   X   X   table breatless in an integrate to back \$6.8 a stresser on awayons and companying the property of the propert	Pa	rt I	The total of amour	nts in colur	mns (b), (c), an	id (d) ma	y not	(a exp	) Revenue a benses per b	ind books			(0			fo	or charitable i	purposes
Interest on assings and temporary		1								0.								
A Dividends and interest from securities   17,002.   17,002.   STATEMENT 1		2				o attach S	ch B									<u> </u>		<del></del>
Sa Gross rents		3	Interest on savings a cash investments	and tempo	orary													
Document		4	Dividends and in	terest fro	m securities	3			17,0	002.	1	<u>.7,002.</u>				S.T.	<u>ATEME</u>	NT 1
Same		5a	Gross rents										مرسد.	VE 11.	-	+		
Day		-		· · -		-			1 (	000		1 [	3 5 {	- Jan J 14	<u>``~</u>	31	<u></u>	
Net Since First Capital gain	/enne							-	Τ, ζ	886.			1 -		0012	4		
Net Since First Capital gain		D assets on line 6a O J Z I Z •				<u> </u>				1 006	SEP	<del>13</del>	5012	123				
9	Вè		· -									T, 0000	-			1 1	1	
10a and allowances				• -	11						., ,	<del>-                                    </del>	$\overline{}$	- 15 KS 17	1 11	1	<del>                                     </del>	
b Less Cost of goods sold c Gross profit or (loss)  11 Other income 12 Total. Add lines 1 through 11 13 Compensation of officers, directors, furstees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16 Legal fees 17 Total Start 4 18 Taxes 18 Taxes 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 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-)	,	_	Gross sales less ret									1	1300	L. 13. 1		<del> </del>	<u> </u>	
e Gross profit or (loss) 11 Other income 12 Total. Add lines 1 through 11 13 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16 Legal fees 17 STMT 3 18 Accounting fees 18 STMT 4 18 Taxes 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 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: 28 Excess of revenue over expenses and desbursements b Net investment income (f negative, enter -0-) 29 Codings of the professional fee investment income (f negative, enter -0-) 20 Codings of the professional fee investment income (f negative, enter -0-) 29 Codings of the professional fee income (f negative, enter -0-) 20 Codings of the professional fee income (f negative, enter -0-) 20 Codings of the professional fee income (f negative, enter -0-) 20 Codings of the professional fee income (f negative, enter -0-) 20 Codings of the professional fee income (f negative, enter -0-) 21 Subtract line 26 from line 12: 22 Excess of revenue over expenses and disbursements b Net investment income (f negative, enter -0-) 24 Adjusted net income (f negative, enter -0-) 25 Adjusted net income (f negative, enter -0-) 26 Adjusted net income (f negative, enter -0-) 26 Adjusted net income (f negative, enter -0-)				nold								<del></del>				<del>                                     </del>		
11 Other income   12 Total. Add lines 1 through 11   19,558.   18,888.   670.   13 Compensation of officers, directors, trustees, etc   14 Other employee salaries and wages   15 Pension plans, employee benefits   16a Legal fees   STMT   3   4,025.   1,259.   2,089.   0.   3,526.   0.   3,526.   0.   0.   0.   0.   0.   0.   0.			_	•						-						<del> </del>		
12   Total   Add lines 1 through 11   19,558   18,888   670			•	000)						670.		0.			670.	ST	ATEME	NT 2
13   Compensation of officers, directors, trustees, etc   14   Other employee salaries and wages   15   Pension plans, employee benefits   16a Legal fees   STMT   3   4   0.25   1   1.259   2   0.89   0   0   0   0   0   0   0   0   0				1 throug	h 11						1							
15   Pension plans, employee benefits   16a   Legal fees   STMT   3   4 , 0.25   1 , 259   2 , 0.89   0   0   0   0   0   0   0   0   0						s, etc				500.		156.			0.			0.
16a Legal fees   STMT   3   4,025.   1,259.   2,089.   0.     b Accounting fees   STMT   4   3,526.   0.   3,526.   0.     c Other professional fees   STMT   5   4,177.   1,307.   2,168.   0.     17 Interest   18 Taxes   STMT   6   437.   0.   0.   0.     19 Depreciation and depletion   20 Occupancy   21 Travel, conferences, and meetings   22 Printing and publications   23 Other expenses   STMT   7   228.   0.   0.   0.     24 Total operating and administrative   expenses. Add lines 13 through 23   12,893.   2,722.   7,783.   0.     25 Contributions, gifts, grants paid   30,066.   30,066.     26 Total expenses and disbursements.   Add lines 24 and 25   42,959.   2,722.   7,783.   30,066.     27 Subtract line 26 from line 12:   a Excess of revenue over expenses and disbursements   b Net investment income (if negative, enter -0-)   16,166.   0.     c Adjusted net income (if negative, enter -0-)   0.		14	Other employee:	salaries a	and wages													
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.		15	Pension plans, e	mployee	benefits											1		
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	ses	16a	Legal fees		SI	TM	3											
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	ben	b	-															
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	찣	С	Other profession	al fees	SI	TM	5		4,	<u> 177.</u>		1,307.	-	2	,168.	<u> </u>		0.
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	ti Ve	17					_			400			-			┼		
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	tra	18				TM	6	-		437.		0.	-		0.	<del>\</del>		0.
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	inis	19	-	i depletio	n											+-		
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	퉏	20											-			+-		
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	δĀ	21	•														<del></del>	
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	lan	22		nications		ייזאני	7			228		n	+		<u> </u>			n
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	ting	23		and ad-		. PI I	1			<u> </u>			+			+		
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	era	24							12	893.		2.722	.]	7	.783			0 -
26 Total expenses and disbursements.  Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	Ö	25									<del> </del>				,		30	0.066-
Add lines 24 and 25  27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)		l								- <del></del>			1			1		
27 Subtract line 26 from line 12:  a Excess of revenue over expenses and disbursements  b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.		-	-						42.	959.	[	2,722		7	,783.		30	,066.
a Excess of revenue over expenses and disbursements  b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.	_	27			12:					<u>-</u> _								
b Net investment income (if negative, enter -0-)  c Adjusted net income (if negative, enter -0-)  0.						ursemer	nts		<23,	401.	<u> </u>							
												L6,166.						
			Adjusted net inc	ome (if n	egative, enter	-0-)									0			

<u>Fori</u>	n 99	0-PF (2012) THE JULIUS AND BERTHA OR			0427503 Page 2
P	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
		Cash - non-interest-bearing	178,980.	12,314.	12,314.
		Savings and temporary cash investments			
	3	Accounts receivable >			
		Less; allowance for doubtful accounts			
	4	Pledges receivable			
	_	Less; allowance for doubtful accounts			<del></del>
		Grants receivable			·
	6	Receivables due from officers, directors, trustees, and other			
	7	disqualified persons Other notes and loans receivable			
	′	Less: allowance for doubtful accounts			
<b>/</b> 0	0	Inventories for sale or use			
Assets	_	Prepaid expenses and deferred charges			
As		Investments - U.S. and state government obligations	-		
		Investments - corporate stock STMT 9	382,082.	549,725.	549,725.
		Investments - corporate bonds	302,002.	319,7131	3231,231
		Investments - land, buildings, and equipment basis			
	···	Less accumulated depreciation	40,268.	40,268.	40,268.
	12	Investments - mortgage loans			
	13	Investments - other			
		Land, buildings, and equipment: basis			
		Less accumulated depreciation			
	15	Other assets (describe ►			
	16	Total assets (to be completed by all filers)	601,330.	602,307.	602,307.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
S	19	Deferred revenue			
Ě	20	Loans from officers, directors, trustees, and other disqualified persons			
Liabilities	21	Mortgages and other notes payable			
_	22	Other liabilities (describe )			
				0	
_	23	Total liabilities (add lines 17 through 22)  Foundations that follow SFAS 117, check here	0.	0.	
		,			
S		and complete lines 24 through 26 and lines 30 and 31.  Unrestricted	601,330.	602,307.	
Š	24 25	Temporarily restricted	001,330.	002,307	
3ala	26	Permanently restricted			
Fund Balances	20	Foundations that do not follow SFAS 117, check here			
표		and complete lines 27 through 31.			
ō	27	Capital stock, trust principal, or current funds			
ets	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
Ass	29	Retained earnings, accumulated income, endowment, or other funds			
Net Assets or	30	Total net assets or fund balances	601,330.	602,307.	
_					
_	31	Total liabilities and net assets/fund balances	601,330.	602 <u>,307</u> .	
F	art	Analysis of Changes in Net Assets or Fund Ba	alances		
=					<del></del>
1		il net assets or fund balances at beginning of year - Part II, column (a), line	30		601 220
_		st agree with end-of-year figure reported on prior year's return)		1	601,330. <23,401.
		er amount from Part I, line 27a	GEE GWY	TEMENT 8 $\frac{2}{3}$	24,378.
3		er increases not included in line 2 (itemize)		4	602,307.
4 5		reases not included in line 2 (itemize)		5	0.
_		il net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b), line 30	6	602,307.
<u>~</u>	. 510	and the same state of the same			Form <b>990-PF</b> (2012)

45-0427503

P	art IV   Capital Gains	and Losses for Tax on In	vestment	Income				
		ribe the kind(s) of property sold (e.g. arehouse; or common stock, 200 shs			(b) How acquir P - Purchase D - Donation	:   19	) Date acquired mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	207.9 SHARES G	UGGENHEIM MANAGE	NED FUN	1D	P	V.	ARIOUS	08/23/12
	2006 SHARES PI				P	V.	ARIOUS	08/23/12
		ONEER FUNDAMENTA	Т.		P		ARIOUS	08/27/12
		MORGAN MARKET		-	P		ARIOUS	12/03/12
_	347 DIMICES SI	IIOICIUV IIIICICII						
е		(f) Depreciation allowed	(a) Cost	t or other basis	<u> </u>		(h) Gain or (loss	١
	(e) Gross sales price	(or allowable)		opense of sale	_	(	(e) plus (f) minus	(g)
a	4,599.			5,03				<431.
b	25,000.			24,49				506.
C	30,624.			28,86				1,762.
d	5,049.			5,00	0.			49.
е								
	Complete only for assets shown	ng gain in column (h) and owned by	the foundation	on 12/31/69		(I) G	aıns (Col. (h) gaın	minus
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (i)			t), but not less that cosses (from col. (	
a								<431.
		-						506.
b								1,762.
C								49.
<u>d</u>								47.
e		L	L					<del></del>
	Capital gain net income or (net ca	. ( . (		7 7	} 2			1,886.
	If gain, also enter in Part I, line 8,	ss) as defined in sections 1222(5) ar	iu (o).		7			
	If (loss), enter -0- in Part I, line 8				}  <sub>3</sub>		N/A	
	Part V Qualification U	Inder Section 4940(e) for	Reduced	Tax on Net	Investmen	nt Inco	me	
if s Wa	section 4940(d)(2) applies, leave the section 4940(d)(2) applies, leave the section liable for the section is the section of the section is the section of t	ction 4942 tax on the distributable an	nount of any ye	ar in the base per				Yes X No
		alify under section 4940(e). Do not co			-4			
1_		each column for each year; see the I	nstructions bet	ore making any e	ntries.			(d)
	(a) Base period years Calendar year (or tax year beginn	ing in) Adjusted qualifying dis	stributions	Net value of no	(c) incharitable-use	assets	Dıstrıl (col. (b) dı	(d) bution ratio vided by col. (c))
	2011	2	4,683.		429,	886.		.057418
	2010	2	21,575.		428,	423.		.050359
	2009	3	30,928.		403,	405.		.076667
	2008		31,067.			217.		.072212
_	2007		2,552.			729.		.067252
	2007		12 / 3321					
	Total of line 1, column (d)						2	.323908
3	the foundation has been in exist	: 5-year base period - divide the total ence if less than 5 years	on line 2 by 5,	or by the number	or years		3	.064782
4	Enter the net value of noncharita	able-use assets for 2012 from Part X,	, line 5				4	578,593
5	Multiply line 4 by line 3						5	37,482
6	Enter 1% of net investment inco	me (1% of Part I, line 27b)					6	162.
7	Add lines 5 and 6						7	37,644
8	Enter qualifying distributions fro						8	30,066
	If line 8 is equal to or greater that See the Part VI instructions.	an line 7, check the box in Part VI, line	e 1b, and comp	olete that part usin	ng a 1% tax rate			

	990-PF (2012) THE JULIUS AND BERTHA ORTH FOUNDATION			<u>0427</u> !		F	age 4
	rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940	e), or 4	948 -	see in	stru	ctior	<u>15)</u>
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     Image: Land enter 1%   I	•	1			3	<u>23.</u>
	of Part I, line 27b						
C	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).	J					
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2				<u>0.</u>
3	Add lines 1 and 2		3			<u>3</u>	23.
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	23.
6	Credits/Payments:						
a	2012 estimated tax payments and 2011 overpayment credited to 2012 6a 6a						
b	Exempt foreign organizations - tax withheld at source 6b						
C	Tax paid with application for extension of time to file (Form 8868)	400.					
đ	Backup withholding erroneously withheld 6d 6d						
7	Total credits and payments. Add lines 6a through 6d		7			4	00.
8	Enter any <b>penalty</b> 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				<del>77.</del>
11	Enter the amount of line 10 to be: Credited to 2013 estimated tax	nded ►	11				0.
Pa	rt VII-A Statements Regarding Activities						
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate of	r ıntervene	ın	ļ		Yes	
	any political campaign?			1	1a		<u>X</u>
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for de	finition)?		L	1b		_X_
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any material	s publishe	ed 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. ▶ \$ (2) On foundation managers. ▶ \$	0.					
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on found	ation					
	managers. ► \$ 0.						
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?				2		X
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		X
	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?			-	5		X
	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:						
	By language in the governing instrument, or						
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict w	th the state	e 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?			-	_ 7	X	
	If "Yes," complete Part II, col. (c), and Part XV						
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)						
	ND						
b	o If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or design	ate)					
	of each state as required by General Instruction G? If "No," attach explanation				8b	X	<u> </u>
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)	(5) for cale	endar			l	<u>_</u> _
	year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV			}	9	<b> </b>	X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addr.	esses			10	<u> </u>	X

Part VII-A   Statements Hegarding Activities (continued)  I Alary imme during the year, diff the foundation, directly or indirectly, or an controlled entity within the meaning of sections 1/2(0)(13)? If "Yes," attach schedule (see instructions)  I Alary imme during the year, diff the foundation of an orange of sections 1/2(0)(13)? If "Yes," attach statement (see instructions)  I D diff the foundation comply with the public inspection requirements for its annual returns and exemption application?  Website address > NONE  I The books are in core of > PAYE HARRISON  Localed at > PO BOX 16.2, ROSEMOUNT, MN  I Section 49/1(2)(1) nonexempt charitable trusts fring Form 390-PF in lieu of Form 1041 - Check here and either the amount of tax example interest received or accreed during the year  I Al any time during calendar year 2012, do the foundation have an interest in or a signature or other authority over a bank, securities, or other francial account in a 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.  1a During the year do the foundation (either directly or indirectly):  (1) Gnage in the sale or exchange, or lessing of provided person?  (2) Format money from, lend money to, or otherwise extend credit to (or accept it from) a dequalished person?  (3) Transfer any money or gray or remburse the expenses of, a disqualished person?  (4) Pay compensation to, or pay or remburse the expenses of, a disqualished person?  (5) Format prods, services, or localises to (or accept them from) a dequalished person or or benefit or used of a disqualished person or or benefit or used of a disqualished person or or the benefit or used of a disqualished person or or the benefit or used of a disqualished person or or the benefit or used of a disqualished person or or the benefit or used of a disqualished person or or the benefit or used of a disqualished person or or the benefit or used or a disquali	<u>orm</u>	990-PF (2012) THE JULIUS AND BERTHA ORTH FOUNDATION 45-042	<u> 7503</u>		Page 5
section 12(0)(13)? If "Yes," attach schedule (see instructions)  12 bid the foundation makes a distribution to a donor advised fund over which the foundation or a disqualided person had advisory privileges?  If "Yes, attach statement (see instructions)  12 bid the foundation occopy with the public inspection requirements for its annual returns and exemption application?  Workster address > NONE  13 bid the foundation comply with the public inspection requirements for its annual returns and exemption application?  Workster and selection of PATE HARRISON  15 Section 4947(a)(1) nonexempt charactable trusts fining Form 990 PF in lieu of Form 1041 - Check here and either the amount of the exemption friends received in a carcued during the year  16 At any time during calendar year 2012, do the foundation have an interest in or a signature or other authority over a bank, societies, or other famoral account in a foreign country?  16 At any time during calendar year 2012, do the foundation have an interest in or a signature or other authority over a bank, societies, or other famoral account in a foreign country?  16 At any time during calendar year 2012, do the foundation have an interest in or a signature or other authority over a bank, societies, or other famoral account in a foreign country?  16 At any time during calendar year 2012, do the foundation have an interest in or a signature or other authority over a bank, societies, or other signatures and the foundation of the foundation of the foundation (either discussion of the foundation of the foundation (either discussion of the foundation of the foundation (either discussion of the foundation greater)  16 File Form 4720 if any item is sich or excharging, or issuance of credit for (or except if from) a disqualified person?  17 Engage in the sale or excharging, or issuance of profess with the foundation proper in the sich or excharging or profess with the foundation proper in the sich or excharging, or issuance of the foundation of designations for the promote of a	Pa	rt VII-A Statements Regarding Activities (continued)	,	1	
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If Yes, attach statement (see matructons)  10 date foundation comply with the public inspection requirements for its annual returns and exemption application?  Webote address ▶ NONE  11 The books are in circle of ▶ FAYE HARRISON  Section 4947(a)(1) noneampt charitable trusts firing form 990-PF in lieu of Ferm 1041 - Check here and earlier the amount of tax-evempt interest received or accrued during the year  16 At any time during calendar year 2012, dot the foundation have an interest in or a signature or other authority over a bank, securities, or other financial about in a foreign country?  See the instructions for exceptions and filing requirements for Form 10 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.  19 Jurning they said did the foundation (lefter directly or indirectly);  (1) Engage in the sale or exchange, or lessing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)  a disqualified person?  (3) Furnish goods, services, or it aclities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or rembruse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person?  (6) Agree to pay money or property to a government official? (Exception Check 'No' if the foundation arged or in make a grant to or to employ the official for a period after the acception of the period discount of the period of the condition anged or an acrive at other period disself exception of defined in section 4942((a)) or an acurrent sole regarding disself assistance check here  (a) It is the years be a formation or experiment service, if terminating within 90 dispays.)  b) Are there any years listed in 2s for which the foundation is not applying the provisions of section 4942(a) to dispay and the acts described i		section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		<u> X</u>
13	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?	1		
Webste address \top \text{NONE} \text{PAYE HARRISON} \text{Tologhome no.} \top \text{95.24.32-0515} \text{Tologhome no.} \text{PSO BOX 16.2, ROSEMOUNT, MN} \text{2PI.44} \top \text{55.068} \text{3.5068} 3.5			-		<u>X</u>
14. The books are in care of ▶ PAYE HARRISON Located at ▶ PO BOX 162, ROSEMOUNT, MN  15. Section 4947(a)(1) nonezempt charitable trusts ling form 990-PF in leu of form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year A stay time during cellendry sery 2012, did the foundation have an interest in or a significant or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filting requirements for Form 10 F 90-22.1. If Yes, anter 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.  1 During the year did the foundation (either directly or indirectly);  1 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?  2 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  3 Furnish goods, services, or facilities to (or accept them from) a disqualified person?  4 Pes  No  4 Pey compensation to, or pay or rembruse the expenses of, a disqualified person?  5 Farafier any income or assets to a disqualified person (or make any of either evaluable for the benefit or use of a disqualified person)?  6 Agree to pay money or property to a povernment officia? (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, or a current notice regarding disaster assetiance cleak here  2 Did the foundation engage in a prior year in any of the acts fail to quality under the exceptions described in Regulation section 53.494 f1(6)-3 or an a current notice regarding disaster assetiance cleak here  2 Did the foundation engage in a prior year in any of the acts fail to quality under the exceptions described and se	13		13_	X	
Located at No PO. BOX 162 ROSEMOUNT. MN  Section 4947(a)(1) nonexempt charable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of lax-exempt interest received or accrued during the year  16. At any time during calendary year 2012, did the foundation have an interest in or a signature or other authority over a bank, so 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.  1 a During the year of the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or lacinities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburs the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available to the benefit or use of a disqualified person (or make any of either available to the benefit or use of a disqualified person (or make any of either available)  10) If any answer is "Yes" to 1(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.44 (1)-30 or in a current notice regarding disaster assistance (see instructions)?  10) Organizations relying on a current notice regarding disaster assistance (see instructions)?  11) Transfer on your power in any of the acts discribed in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?  11) Text and the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time  12) If the foundation hold more than a 2% direct or indirect interest in any business enter					
15 Section 4947(a)(1) nonexempt charitable trivials 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  16 At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?  See the instructions for exceptions and fining requirements for Form 10 F 90-22.1. If Yes, enter the name of the foreign country.  Part VIII-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.  1a During the year did the foundation (either directly or indirectly);  (1) Engage in the sale or exchange, or beasing of property with a disqualified person?  (2) Borrow money from, and money to, or otherwise extend credit to (or accept It from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or remburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person)?  (6) Agree to pay money or property to a government official? (Exception Check No' if the floundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days, or a current notice regarding deaster assistance check here  2. Did the foundation engage in a prior year in any of the acts fiel to qualify under the exceptions described in Regulations section 53.494 (10)-3 or in a current notice regarding deaster assistance check here  2. Did the foundation engage in a prior year in any of the acts festioned in 1a, other than exception dats, that were not corrected before the first day of this baye beginning in 2012?  2. Taxes on failure to distribute incomer (section 4942) (does not applying the provisions of section 4942(a)(2) relating to moorrect valuation of a 4942(a)(3)	14				
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Securities, or other financial account in a foreign country?  See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country.  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.  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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)  a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay componsation to, or pay or reimburse the expenses of, a disqualified person?  (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 of (incline)? (Exception Check 'No'  (6) Agree to pay money or property to a government official? (Exception Check 'No'  (7) If the foundation engage in a make a grant to or to employ the official for a period after termination of government service, it farminating within 90 days.)  b) If any answer is "Yes" to 1a (1)-(6), did any of the acts discribed in 1a, other than excepted acts, that were not corrected before the first day of the lax year beginning in 2012?  1a Act 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?  1b Are there any years issted in 2a for which the foundation is not applying the provisions of section 4942(a)(3) or 4942		<u> </u>	N		
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.  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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  b) If any answer is "Yes" to 14(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(i)-3 or in 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 boginning in 2012?  2) Taxes on failure to distribute income (exclicit adyle) (dies not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5)):  a) At the end of tax year 2012, did the foundation is not applying the provisions of section 4942(a)(2) (relating to microrect 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.)  c) If "res," did it have excess busines	16		1	Yes	
Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required			16	L	<u>X</u>
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.   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   X No   No   2   Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?   Yes   X No   Yes					
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(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (6) Agree to pay money or property to a government official? (Exception Check 'No' if the foundation argued to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)  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 53.481 (1/3) or in a current notice regarding disaster assistance check here  c bid 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?  1a 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"  b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to micorrect 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.)  c If the provisions of section 4942(a)(2) are being applied to any of the year's listed in 2a, list the years here.  b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4943(a)(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		· · · · · · · · · · · · · · · · · · ·	-	res	NO
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(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  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 53.491(d)-3 or in a current notice regarding disaster assistance (see instructions)?  Criganizations relying on a current notice regarding disaster assistance (see instructions)?  Criganizations relying on a current notice regarding disaster assistance (see instructions)?  Criganizations relying on a current notice regarding disaster assistance (see instructions)?  Criganizations relying on a current notice regarding disaster assistance (see instructions)?  Criganizations relying on a current notice regarding disaster assistance (see instructions)?  Criganizations relying on a current notice regarding disaster assistance (see instructions).  Criganizations relying on a current notice regarding disaster assistance (see instructions).  1b					
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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?  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 \					
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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 \[ \]	2				
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statement - see instructions.)  c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	I		1	1	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.					
Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?    Yes   X   No		·	2b	-	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  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  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  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	•	c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.			
during the year?  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)  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  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?  Ves X No  Yes X No  Ab 3b  Ab X					
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  Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  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	3				
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)  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4b 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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4aXb Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?4aXb 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?4bX			24		
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	4				×
had not been removed from jeopardy before the first day of the tax year beginning in 2012?			74		
			4h		x
				)-PF	

Form 990-PF (2012) THE JULIUS AND BERTHA OR			<u>45-04275</u>	03 Page 6
Part VII-B   Statements Regarding Activities for Which F	orm 4720 May Be F	Required (continu	ued)	
5a During the year did the foundation pay or incur any amount to:				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1 4945(e))?	Ye	s X No	
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indire			
any voter registration drive?			s X No	
(3) Provide a grant to an individual for travel, study, or other similar purposes	?	Ye	s X No	
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section			
509(a)(1), (2), or (3), or section 4940(d)(2)?		Ye	s X No	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or			
the prevention of cruelty to children or animals?			s 🗶 No	
<b>b</b> If any answer is "Yes" to 5a(1)-(5), did <b>any</b> of the transactions fail to qualify und	•	ın Regulations	/-	
section 53.4945 or in a current notice regarding disaster assistance (see instru			N/A	5b
Organizations relying on a current notice regarding disaster assistance check h				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr			l	
expenditure responsibility for the grant?		I∕A ∐ Ye	s L No	
If "Yes," attach the statement required by Regulations section 53.494				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on		s X No	
a personal benefit contract?	annual banafit contractO	Ye		6b X
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?			00 A
If "Yes" to 6b, file Form 8870.  7a At any time during the tax year, was the foundation a party to a prohibited tax s	holter transaction?	□ v <sub>°</sub>	s X No	
b If "Yes," did the foundation receive any proceeds or have any net income attribu				7b
Information About Officers Directors Truct	ees Foundation Ma	nagers Highly		7.0
Part VIII Paid Employees, and Contractors	ooo, roundation me			
1 List all officers, directors, trustees, foundation managers and their	compensation.			
	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) Expense account, other
(a) Name and address	to position	(If not paid, enter -0-)	and deferred compensation	allowances
SEE STATEMENT 10		500.	0.	0.
			a :	
2 Compensation of five highest-paid employees (other than those inc	luded on line 4) If name	anter INONE II		L
2 Compensation of five nignest-paid employees (other than those inc	(b) Title, and average	, enter NONE.	(d) Contributions to employee benefit plans	(e) Expense
(a) Name and address of each employee paid more than \$50,000	hours per week	(c) Compensation	l and deterred	account, other
MONE	devoted to position		compensation	allowances
NONE	-			
	-			1
		<del> </del>		
	1			
		<del>                                     </del>		
	-			
	1			
Total number of other employees paid over \$50,000			<b></b>	0

orm 990-PF (2012) THE JULIUS AND BERTHA ORTH FOU	NDATION 45-	0427503 Page 7
Part VIII Information About Officers, Directors, Trustees, Foun Paid Employees, and Contractors (continued)	dation Managers, Highly	
Five highest-paid independent contractors for professional services. If none, er		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	<del> </del>	
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 st	tatistical information such as the	Expenses
number of organizations and other beneficiaries served, conferences convened, research papers	produced, etc.	
1 <u>N/A</u>		
2		
3		
4		
Part IX-B Summary of Program-Related Investments	1.10	A
Describe the two largest program-related investments made by the foundation during the tax yea	r on lines 1 and 2.	Amount
1 <u>N/A</u>		
2		
All other program-related investments. See instructions.		
3		1
		1
Total Add lines 1 through 3	<b>&gt;</b>	0.

Page 8

P	art X. Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations,	see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		<del></del>
a	Average monthly fair market value of securities	1a	475,358.
b	Average of monthly cash balances	1b	71,778.
C	Fair market value of all other assets	1c	40,268.
d	Total (add lines 1a, b, and c)	1d	587,404.
е	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	587,404.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	8,811.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	578,593.
6	Minimum investment return. Enter 5% of line 5	6	28,930.
P	<b>art XI</b> Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here  and do not complete this part.)	d certain	
1	Minimum investment return from Part X, line 6	1	28,930.
2a	Tax on investment income for 2012 from Part VI, line 5		
b	Income tax for 2012. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	323.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	28,607.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	28,607.
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_	28,607.
_	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		22.25
a		1a	30,066.
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	20.066
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	30,066.
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	30,066.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	- "
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation (4940(e) reduction of tax in those years.	qualities fo	r the section

Form **990-PF** (2012)

Part XIII Undistributed Income (see instructions)

e Remaning amount distributed out of corpus  5 Excess distributions carryover applied to 2012 (if an amount papes in column (in), the same amount must be shown in column (is)  6 Enter the total of each column as indicated below  a Corpus Add lines 5t, 4c, and 4e Subtract line 5  b Prior years' undistributed income. Subtract line 4b from line 2b  6 Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 494(2) lax has been previously assessed  d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013  7 Amounts traetade as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(a)(3)  8 Excess distributions carryover from 2007 not applied on line 5 or line 7  9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2008 10 , 038 - b Excess from 2009 11 , 020 - c Excess from 2011 3, 429 -					
Distributable amount for 2012 from Part XI, Inte 7   28,,607.					
Inter 7	1 Distributable amount for 2012 from Part XI	Corpus	rears prior to 2011	2011	2012
2 Lindershood scores, 4 say, and of the anifold satility a Finite amount for 2011 only b Total for prior years.  3 Excess distributions carryover, 4 any, to 2012; a From 2007					28,607.
Screes distributions carryover, if any, to 2019:  a From 2007  11, 834. b From 2008  10, 0.38. c From 2009  11, 0.20. d From 2010  4 334. e From 2010  3 , 42.29. I Total of lines 3 throughe  Cualitying distributions for 2018 from Part XI, line 4: № \$ 30, 0.65. a Applied to 2011, but not more than line 2a Applied to 2011, but not more than line 2a Applied to 2011, but not more than line 2a Applied to 2011, but not more than line 2a Applied to 2011 and the structures of prior years (Election required - see instructions)  1 readed as distributions out of corpus (Election required - see instructions)  2 applied to 2011, but not more than line 2a Applied to 2011 and the structures of the structures of the structures of the structures of the structure of the structu	Г				
S = Secess distributions carryover, fany, to 2012: a From 2007				0.	
3 Excess distributions carryover, if airly, to 2012 a From 2009 11, 0.20. b From 2009 11, 0.20. b From 2010 4.34. e From 2011 1.	b Total for prior years:				
a From 2007	,,		0.		
From 2008	-				
From 2009				-	
4 From 2010			i		
From 2011					
1 Total of lines 3a through e 4 Qualitying distributions for 2012 from Part XII, line 4 № 5 30,066. a Appled to 2011, but not more than line 2a b Appled to undistributed income of prior years (Election required - see instructions) 0 Treated as distributions out of corpus (Election required - see instructions) 4 Appled to 2012 distributible amount a Remaining amount distributed out of corpus 5 Excees distributions curryover applied to 2012 of an amount applied to the same amount.  6 Enter the net total of each column as indicated below 8 Corpus Add tine 31.4, and 4e Substreat tine 5 b Phrory years' indistributed income. Subtract line 4b from line 2b cefirst the amount of prior years' undistributed income. Subtract line 4b from line 2b cefirst the amount of prior years' undistributed income for which a notice of deficiency has been instead or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2015. Subtract lines 4d and 6 from line 1.1 his amount must be distributed in 2013 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b) (17)(c) or 4942(b)(3) 8 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: Excess from 2009 11, 2020. 6 Excess from 2001 2434. 6 Excess from 2001 2434. 6 Excess from 2001 25 Excess from 2001 26 Excess from 2001 3, 429.					
4. Qualifying distributions for 2012 from Part XII, line 4: ▶ \$ 30,066. a Applied to 2011, but not more than line 2a b Applied to 2011, but not more than line 2a b Applied to undistributed income of prior years (Election requiredsee instructions) c Treated as distributions out of corpus (Election requiredsee instructions) d Applied to 2012 distributible amount e Remaining amount distributed out of corpus 5 c.seas distributions carryover applied to 2012 ciff an amount appears in column (qi). the same amount must be before in column (qi). The amount of prior years' undistributed incomes in column (qi). The amount of prior years' undistributed incomes. Subtract line 4b from line 2b c. Enter the amount of prior years' undistributed income for which a notice of difficiency has been issued, or on which the section 494(2) lat kins been previously assessed distributions carryover to 2011. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2013. Subtract line 4a from line 5 from line 1. This amount must be distributed in 2013 7 . Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2007 not applied on line 5 or line 7 9 Excess from 2008 10,038. b Excess from 2009 11,020. e Excess from 2009 11,020. e Excess from 201 433.4, decreased in 23,429.		36 755			
Part XII, ine 4: № \$ 30,066. a Appled to 2011, but not more than line 2a b Appled to modistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Appled to 2012 distributable amount e Remaining amount distributed out of corpus c (Flection required - see instructions) d Appled to 2012 distributable amount e Remaining amount distributed out of corpus c (fleat amount appears in column (s)) d	Г	30,733.			4
a Applied to 2011, but not more than line 2a b Applied to undistributed income of prior years (Effection required - see instructions) control corpus (Election required - see instructions) control corpus control co					
D Applied to undistributed income of prior years (Election required - see instructions) control (Election required - see instructions) destributions out of corpus (Election required - see instructions) destributions arraywer applied to 2012 distributions carrywer applied to 2013 distributed income for 2011. Subtract line 4 from line 2b. Taxable amount - see instructions e Undistributed income for 2011. Subtract line 4 from line 2a. Taxable amount - see instructions e Undistributed income for 2011. Subtract line 4 from line 2. Traxable amount - see instructions of Corpus to satisfy requirements imposed by section 170(b) (1)(F) or 4942(p)(3) distributions carryover from 2007 not applied on line 5 or line 7 sexes distributions carryover from 2007 not applied on line 5 or line 7 sexes distributions carryover from 2007 not applied on line 5 or line 7 sexes distributions carryover from 2007 not applied on line 6 or line 7 sexes distributions carryover from 2007 not applied on line 6 or line 7 sexes distributions carryover from 2005 not applied on line 6 or line 7 sexes distributions carryover from 2005 not applied on line 6 or line 7 sexes distributions carryover from 2005 not applied on line 6 or line 7 sexes distributions carryover from 2005 not applied on line 6 or line 7 sexes distributions carryover from 2005 not applied on line 6 or line 7 sexes distributions carryover from 2005 not applied on line 6 or line 7 sexes distributions carryover from 2005 not applied on line 6 or line 7 sexes distributions carryover from 2005 not applied to 2013 not applie	,			0.	
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c Treated as distributions out of corpus ((Election required - see instructions) d Applied to 2012 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2012 ((rich a mount appear in column (a)) 6 Enter the not total of each column as indicated below a Corpus Additions of 4.6. and 46 Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions c Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instructions c Undistributed income for 2011. Subtract line 4a from line 2. Taxable amount must be distributed in 2013 7. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8. Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a 10. Analysis of line 9: a Excess from 2008 a Excess from 2009 11,020. c Excess from 2001 434. d Excess from 2011 3,429.	• • • • • • • • • • • • • • • • • • • •		0.		
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Applied to 2012 distributable amount	•	0.			
e Remaining amount distributed out of corpus  5 Excess distributions carryover applied to 2012 (first amount appears in column (a))  6 Enter the art total of each column as indicated below  a Corpus Add lines 31, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b  6 Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 494(2) lax has been previously assessed  d Subtract line 6c from line 6b. Tavable amount - see instructions e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013 7 Amounts traetade as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(0)(3) 8 Excess distributions carryover from 2007 not applied on line 5 or line 7  9 Excess distributions carryover from 2007 not applied on line 5 or line 7  9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2008 10 , 0.38 b Excess from 2009 11 , 0.20 c Excess from 2011 3, 429 .	` ` · · · · · · · · · · · · · · · · · ·				28,607.
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6 Enter the net total of each column as indicated below a Corpus Add lines 3, 4c., and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b c. Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount instead ad ad 5 from line 1. This amount must be distributed in 2013 c. Amounts treated as distributions out of corpus to satisty requirements imposed by section 170(b)(1)(F) or 4942(g)(3) c. d. Subtract lines 7 and 8 from line 6a c. Taxable amount in the case distributions carryover from 2007 not applied on line 5 or line 7 c. This amount must be distributions carryover to 2013 subtract lines 7 and 8 from line 6a c. Taxable amount in the case of the corpus to satisty requirements imposed by section 170(b)(1)(F) or 4942(g)(3) c. d. secess distributions carryover to 2013 subtract lines 7 and 8 from line 6a c. Taxable amount in the case of the corpus to satisty requirements imposed by section 170(b)(1)(F) or 4942(g)(3) c. d. secess from 2008 c. Secess from 2008 c. Secess from 2008 c. Excess from 2010 d. 434. d. d. d. Excess from 2011 d. 3, 429.	(If an amount appears in column (d), the same amount	0.			0.
a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Pror years' undistributed income. Subtract line 4b from line 2b  C Enter the amount of pror years' undistributed mome for which a notice of deficiency has been insued, or on which the section 4942(a) tax has been previously assessed  d Subtract line 6c from line 6b. Taxable amount - see instr. d Indistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013  Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(a)(3)  Excess distributions carryover from 2007 not applied on line 5 or line 7  Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a  Analysis of line 9: a Excess from 2008  10,038. b Excess from 2008 11,020. c Excess from 2011 434. d Excess from 2011 3,429.	6 Enter the net total of each column as				
b Prior years' undistributed income. Subtract line 4b from line 2b  c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed  d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2007 not applied on line 5 or line 7 9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2008 b Excess from 2008 c Excess from 2009 c Excess from 2010 d Excess from 2011		20 214			
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c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed  d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(a)(3) 8 Excess distributions carryover from 2007 not applied on line 5 or line 7 9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2008 b Excess from 2009 c Excess from 2009 c Excess from 2010 d 434. d Excess from 2011 3, 429.			n		
undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed  d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(a)(3) 8 Excess distributions carryover from 2007 not applied on line 5 or line 7 9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2008 b Excess from 2008 c Excess from 2009 c Excess from 2010 d 434. d Excess from 2011 d 3, 429.	<b> </b>				
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e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr.  f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2007 not applied on line 5 or line 7  9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 3, 429.	ļ				
4a from line 2a. Taxable amount - see instr.  f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2007 not applied on line 5 or line 7  9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 3, 429.	amount - see instructions		0.		
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2007 not applied on line 5 or line 7  9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 3, 429.	e Undistributed income for 2011. Subtract line				
lines 4d and 5 from line 1. This amount must be distributed in 2013  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2007 not applied on line 5 or line 7  9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2008	4a from line 2a. Taxable amount - see instr.			0.	
be distributed in 2013  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2007 not applied on line 5 or line 7  9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 3,429.	f Undistributed income for 2012. Subtract				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2007 not applied on line 5 or line 7  9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2008	l l				
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8	The state of the s			1	<u> </u>
section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2007 not applied on line 5 or line 7  9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 3,429.					
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9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 3,429.		11 83/			
Subtract lines 7 and 8 from line 6a       26,380.         10 Analysis of line 9:       10,038.         a Excess from 2008       11,020.         b Excess from 2010       434.         d Excess from 2011       3,429.	* *	11,004.			
10 Analysis of line 9:  a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 3,429.		26.380.			
a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 3,429.		20/0001			
b Excess from 2009 11,020. c Excess from 2010 434. d Excess from 2011 3,429.					
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d Excess from 2011 3, 429.			l l		
	e Excess from 2012 1,459.		J <u></u>	<u></u>	5 000 PE (0040)

Form 990-PF (2012) THE JUL Part XIV Private Operating F	IUS AND BER				27503 Page 10
			A, question 9)	N/A	<del></del>
1 a If the foundation has received a ruling of		•			
foundation, and the ruling is effective fo	•	-	▶ └	· · · · · · · · · · · · · · · · · · ·	
<b>b</b> Check box to indicate whether the found		ig foundation described i		4942(j)(3) or49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years	1 40 0000	ļ ,, <del>,</del> ,,
income from Part I or the minimum	(a) 2012	( <b>b</b> ) 2011	(c) 2010	(d) 2009	(e) Total
investment return from Part X for					
each year listed					
<b>b</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	-				<del> </del>
alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets					<del> </del>
(2) Value of assets qualifying					
under section 4942(j)(3)(B)(i)					<del> </del>
b "Endowment" alternative test - enter 2/3 of minimum investment return					
shown in Part X, line 6 for each year					
listed					ļ <u>.</u>
c "Support" alternative test - enter:					
(1) Total support other than gross					
investment income (interest, dividends, rents, payments on					
securities loans (section				1	
512(a)(5)), or royalties)					
(2) Support from general public		İ			
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 Info	ormation (Comple	te this part only	if the foundation	n had \$5,000 or m	ore in assets
at any time during	the year-see inst	ructions.)			
1 Information Regarding Foundation	on Managers:				
a List any managers of the foundation wi	no have contributed more	than 2% of the total con-	tributions received by th	e foundation before the clo	ose 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 w	no own 10% or more of the	ne stock of a corporation	(or an equally large port	ion of the ownership of a p	partnership or
other entity) of which the foundation ha					
NONE					
2 Information Regarding Contribu	tion. Grant. Gift. Loan	. Scholarship, etc., P	rograms:		
Check here I If the foundation				not accept unsolicited req	uests for funds. If
the foundation makes gifts, grants, etc					
a The name, address, and telephone nur					
a The name, address, and telephone har	inder of a man of the pero-	on to whom approacions	onould be additioned.		
SEE STATEMENT 11					
b The form in which applications should	be submitted and informa	ation and materials they s	hould include:		
c Any submission deadlines:					
d Any restrictions or limitations on award	ds, such as by geographic	al areas, charitable fields	, kinds of institutions, or	other factors:	

Part XVI-A Analysis of Income-Producing Activ	ities
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Enter gross amounts unless otherwise indicated.	Unrelated	business income		d by section 512, 513, or 514	(e)
•	(a) Business	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue:	code	Amount	sion code	Amount	function income
a					
b					
C					
d					
e	1				
f					
g Fees and contracts from government agencies			<u> </u>		
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments			<u> </u>		
4 Dividends and interest from securities			14	17,002.	
5 Net rental income or (loss) from real estate:			<u> </u>		
a Debt-financed property			<del>  _ </del>		
b Not debt-financed property			<del>                                     </del>		
6 Net rental income or (loss) from personal			j l		
property		<del></del>	<del>                                     </del>		
7 Other investment income		14.11	<del>  </del>		
8 Gain or (loss) from sales of assets other	1			1 006	
than inventory			18	1,886.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:			01	670.	
a <u>REFUND</u>	-		01	670.	
b			┼		
d	1		<del>  -</del>	- <del></del> -	
de	-	14.77	<del>  </del>		
12 Subtotal. Add columns (b), (d), and (e)	-	0.		19,558.	0.
13 Total Add line 12, columns (b), (d), and (e)	·		<del>                                      </del>		19,558.
(See worksheet in line 13 instructions to verify calculations.)					23 / 0 0 0 0
	to the Asso	maliahment of Ex	vomnt.	Durnosos	
Part XVI-B Relationship of Activities	to the Acco	mpusiment of Ex	Kempt	- Lurposes	
Line No. Explain below how each activity for which inc			contribu	ted importantly to the accomp	olishment of
the foundation's exempt purposes (other than	n by providing fun	ds for such purposes).			
				<del></del>	<del></del>
	<del></del> _	<del></del>			
				<del></del>	
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223621 12-05-12					Form <b>990-PF</b> (2012)

<u>u</u> 11 165, 0	complete the following schedule.						
(a) Name of organization		(b) Type of organ	(b) Type of organization		(c) Description of relationship		
	N/A						
				<del></del>			
Sign Here Signature Paid Preparer Use Only	r penalties of perjury, I declare that I have examined belief it is true, correct, and complete Declaration of the period of the period of the period of the penalties of perjury, I declare that I have examined the penalties of perjury, I declare that I have examined the penalties of perjury, I declare that I have examined the penalties of perjury, I declare that I have examined the penalties of perjury, I declare that I have examined the penalties of perjury, I declare that I have examined the penalties of perjury, I declare that I have examined the penalties of the penalties of penalties			parer has any knowledge	May the IRS discuss this return with the preparer shown below (see instr.)?  X Yes No.		
Paid	PrintyType preparer's name PATRICK J BROWN	Preparer's signature  Postrich Office	Date 08/29/1	self- employed	PTIN P00149579		
	Firm's name ► BRADY, MAR	Firm's EIN ► 45-0310328					
	Firm's address ► P.O. BOX 1297 BISMARCK, ND 58502-1297			Phone no7(	01-223-1717		
					Form <b>990-PF</b> (2012		

45-0427503 THE JULIUS AND BERTHA ORTH FOUNDATION Part XV **Supplementary Information** Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to Recipient Purpose of grant or contribution Foundation Amount status of any foundation manager or substantial contributor Name and address (home or business) recipient SALAVATION ARMY NONE PUBLIC CHARITY OPERATING GRANT 601 S. WASHINGTON ST 2,000, BISMARCK ND 58504

2,000.

Total from continuation sheets

FORM 990-PF DIVIDENT	OS AND	INTER	EST F	ROM	SECU	TRITIES	ST	ATEMENT	1
SOURCE		GROSS	ROSS AMOUNT		CAPITAL GAINS DIVIDENDS		COLUMN (A) AMOUNT		
RAYMOND JAMES	_					0.		17,002.	
TOTAL TO FM 990-PF, PART I, I	LN 4 =		17,0	002.		0.		17,00	02.
FORM 990-PF	O'.	THER I	NCOME	<u> </u>			ST.	ATEMENT	2
DESCRIPTION			(A REVE PER E	ENUE		(B) NET INVEST- MENT INCOME		(C) ADJUSTEI NET INCOM	
REFUND	EFUND		670.		70.	0.		. 670.	
TOTAL TO FORM 990-PF, PART I	, LINE	11		6	70.	0	 - =	67	70.
FORM 990-PF		LEGAL	FEES	<u> </u>			ST.	ATEMENT	3
DESCRIPTION	EXPE	A) NSES BOOKS		(B) INVE		(C) ADJUSTED NET INCOM		(D) CHARITAI PURPOSI	
LEGAL FEES	4,025		1,259		259	. 2,089.			0.
TO FM 990-PF, PG 1, LN 16A	4,025		1,259		2,089.		0.		
FORM 990-PF A		COUNTI	UNTING FEES		STATEMENT 4			4	
DESCRIPTION	EXPE	A) NSES BOOKS		(B) INVE		(C) ADJUSTED NET INCOM		(D) CHARITAI PURPOSI	
ACCOUNTING FEES		3,526.	0		0.	. 3,526			0.
O FORM 990-PF, PG 1, LN 16B 3,52		3,526.	0		0.	. 3,526		<del></del>	0.

FORM 990-PF (	THER PROFES	SIONAL FEES	STATEMENT 5			
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME				
TRUSTEE EXPENSES	4,177.	1,307.	2,168.	0.		
TO FORM 990-PF, PG 1, LN 16C	4,177.	1,307.	2,168.	0.		
FORM 990-PF	TAX	ES	S	TATEMENT 6		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES		
REAL ESTATE TAXES	437.	0.	0.	0.		
TO FORM 990-PF, PG 1, LN 18	437.	0.	0.	0.		
FORM 990-PF	OTHER E	XPENSES	S	TATEMENT 7		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME				
MISCELLANEOUS DIRECTOR EXPENSE	10. 218.	0.	0.	0.		
TO FORM 990-PF, PG 1, LN 23	228.	0.	0.	0.		
FORM 990-PF OTHER INCREASES	S IN NET ASS	ETS OR FUND BA	ALANCES S	TATEMENT 8		
DESCRIPTION		•		AMOUNT		
UNREALIZED INCREASE IN SECUR		24,378.				
TOTAL TO FORM 990-PF, PART I	II, LINE 3			24,378.		

FORM 990-PF	CORPORATE STOCK	STAT	EMENT	9		
DESCRIPTION		BOOK VALU		FAIR MARKET VALUE 549,725.		
MUTUAL FUNDS HELD BY RAYMOND	JAMES	549,7	25.			
TOTAL TO FORM 990-PF, PART I	I, LINE 10B	549,7	25.			
	- LIST OF OFFICERS, I S AND FOUNDATION MANA		STAT	EMENT 1	10	
NAME AND ADDRESS	TITLE AND AVRG HRS/WK		EMPLOYEE BEN PLAN CONTRIB			
GERALD BIEBER 6430 COUNTY 20 BEULAH, ND 58523	DIRECTOR 1.00	100.	0.	(	0.	
PASTOR JOHN FANELLA 112 3RD AVENUE NW BEULAH, ND 58523	DIRECTOR 1.00	100.	0.	(	0.	
FAYE HARRISON PO BOX 162 ROSEMOUNT, MN 55068	DIRECTOR 1.00	100.	0.	(	ο.	
FAITH FITZGERALD 14029 AVANTI AVE ROSEMOUNT, MN 55068	DIRECTOR 1.00	100.	0.	(	ο.	
DARELL HERMAN 1605 59TH AVE SW BEULAH, ND 58523	DIRECTOR 1.00	100.	0.	(	0.	
TOTALS INCLUDED ON 990-PF, P.	AGE 6, PART VIII	500.	0.		0.	

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 11 PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

FAYE HARRISON PO BOX 90 ROSEMOUNT, MN 55068

TELEPHONE NUMBER

952-432-0515

#### FORM AND CONTENT OF APPLICATIONS

APPLICATIONS SHOULD BE IN THE FORM OF A LETTER REQUESTING ASSISTANCE WITH A QUALIFYING CHARITABLE PURPOSE. IF THE INDIVIDUAL IS A SEMINARY STUDENT VERIFICATION OF THEIR ACCEPTANCE AT AN ACCREDITED SEMINARY MUST ALSO BE PROVIDED. OTHER CHARITABLE APPLICANTS MUST PROVIDE VERIFICATION OF THEIR TAX-EXEMPT STATUS.

#### ANY SUBMISSION DEADLINES

BY JULY 15TH OF EACH YEAR.

#### RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS ARE LIMITED TO ELIGIBLE SEMINARY STUDENTS AND CHARITABLE ORGANIZATIONS IN THE STATE OF NORTH DAKOTA.

### 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

Form 8868 (Rev 1-2013)

ightharpoons If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this form). Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868. Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www irs.gov/efile and click on e-file for Charities & Nonprofits 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 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. Employer identification number (EIN) or Name of exempt organization or other filer, see instructions. Type or print THE JULIUS AND BERTHA ORTH FOUNDATION 45-0427503 File by the Social security number (SSN) Number, street, and room or suite no. If a P.O. box, see instructions filing your PO BOX 162 return See City, town or post office, state, and ZIP code For a foreign address, see instructions instructions ROSEMOUNT, MN 55068 0 4 Enter the Return code for the return that this application is for (file a separate application for each return) Return Return Application **Application** Code Is For Code Is For Form 990-T (corporation) 07 01 Form 990 or Form 990-EZ Form 1041-A 80 Form 990-BL 09 Form 4720 Form 4720 (individual) 03 10 Form 990-PF 04 Form 5227 Form 6069 11 05 Form 990-T (sec 401(a) or 408(a) trust) Form 8870 Form 990-T (trust other than above) FAYE HARRISON The books are in the care of ▶ PO BOX 162 - ROSEMOUNT, MN 55068 Telephone No ▶ 952-432-0515 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. I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until NOVEMBER 15, 2013 , to file the exempt organization return for the organization named above. The extension is for the organization's return for. calendar year ► X tax year beginning APR 1, 2012 , and ending MAR 31, Initial return Final return If the tax year entered in line 1 is for less than 12 months, check reason. \_\_\_ Change in accounting period If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any 400. За nonrefundable credits. See instructions 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 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 Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

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