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Form 990-PF

Return of Private Foundation

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

2012

Open to Public
Inspection

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

For calendar year 2012, or tax year beginning 07-01-2012 , and ending 06-30-2013

Name of foundation HEART INSTITUTE OF SOUTHERN NEW JERSEY	A Employer identification number 22-2574758
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Number and street (or P O box number if mail is not delivered to street address) 1400 E ROUTE 70	Room/suite
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City or town, state, and ZIP code CHERRY HILL, NJ 080342230	C If exemption application is pending, check here <input checked="" type="checkbox"/> <input type="checkbox"/>
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G Check all that apply	<input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity	<input type="checkbox"/> Final return <input type="checkbox"/> Amended return	<input type="checkbox"/> Address change <input type="checkbox"/> Name change
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H Check type of organization	<input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation	<input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation
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I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 9,345,403	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	<input checked="" type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here
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Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
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1 Contributions, gifts, grants, etc , received (attach schedule)				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	19,335	19,335		
4 Dividends and interest from securities.	142,764	142,764		
5a Gross rents	485,245	485,245		
b Net rental income or (loss) 214,285				
6a Net gain or (loss) from sale of assets not on line 10	84,726			
b Gross sales price for all assets on line 6a 1,176,312				
7 Capital gain net income (from Part IV, line 2)		84,726		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	4,649	4,649		
12 Total. Add lines 1 through 11	736,719	736,719		

13 Compensation of officers, directors, trustees, etc	0	0	0
14 Other employee salaries and wages			
15 Pension plans, employee benefits			
16a Legal fees (attach schedule)	3,323	0	0
b Accounting fees (attach schedule)	34,781	0	0
c Other professional fees (attach schedule)			
17 Interest			
18 Taxes (attach schedule) (see instructions)	78,727	76,764	0
19 Depreciation (attach schedule) and depletion	68,690	68,690	
20 Occupancy			
21 Travel, conferences, and meetings	6,993	0	0
22 Printing and publications			
23 Other expenses (attach schedule)	182,585	125,506	0
24 Total operating and administrative expenses.			
Add lines 13 through 23	375,099	270,960	0
25 Contributions, gifts, grants paid.	448,250		448,250
26 Total expenses and disbursements. Add lines 24 and 25	823,349	270,960	448,250
27 Subtract line 26 from line 12			
a Excess of revenue over expenses and disbursements	-86,630		
b Net investment income (if negative, enter -0-)		465,759	
c Adjusted net income (if negative, enter -0-)			

	Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year		
			(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash—non-interest-bearing					
	2 Savings and temporary cash investments		676,626	219,716	219,716	
	3 Accounts receivable ►					
	Less allowance for doubtful accounts ►					
	4 Pledges receivable ►					
	Less allowance for doubtful accounts ►					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)					
	7 Other notes and loans receivable (attach schedule) ►					
	Less allowance for doubtful accounts ►					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments—U S and state government obligations (attach schedule)					
	b Investments—corporate stock (attach schedule)					
	c Investments—corporate bonds (attach schedule)					
	11 Investments—land, buildings, and equipment basis ►	2,588,531				
Less accumulated depreciation (attach schedule) ►	949,635	1,571,522	1,638,896	2,305,258		
12 Investments—mortgage loans						
13 Investments—other (attach schedule)		5,904,028	6,261,681	6,820,429		
14 Land, buildings, and equipment basis ►						
Less accumulated depreciation (attach schedule) ►						
15 Other assets (describe ►)	56,757	56,757	2,010	2,010		
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)		8,208,933	8,122,303	9,345,403		
Liabilities	17 Accounts payable and accrued expenses					
	18 Grants payable					
	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable (attach schedule)					
	22 Other liabilities (describe ►)					
	23 Total liabilities (add lines 17 through 22)		0	0	0	
	Foundations that follow SFAS 117, check here ► <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27 Capital stock, trust principal, or current funds		0	0		
	28 Paid-in or capital surplus, or land, bldg , and equipment fund		0	0		
	29 Retained earnings, accumulated income, endowment, or other funds		8,208,933	8,122,303		
30 Total net assets or fund balances (see page 17 of the instructions)		8,208,933	8,122,303			
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)		8,208,933	8,122,303			

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	8,208,933
2	Enter amount from Part I, line 27a	2	-86,630
3	Other increases not included in line 2 (itemize) ►	3	0
4	Add lines 1, 2, and 3	4	8,122,303
5	Decreases not included in line 2 (itemize) ►	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	8,122,303

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

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

2 Capital gain net income or (net capital loss)	(If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7)	2	84,726
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2011	457,287	9,042,627	0 050570
2010	450,783	9,193,567	0 049032
2009	488,559	9,214,521	0 053021
2008	500,155	9,992,334	0 050054
2007	488,449	10,050,984	0 048597

2 Total of line 1, column (d).	2	0 251274
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 050255
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	8,740,160
5 Multiply line 4 by line 3.	5	439,237
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	4,658
7 Add lines 5 and 6.	7	443,895
8 Enter qualifying distributions from Part XII, line 4.	8	448,250

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	4,658
	Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% 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)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3	Add lines 1 and 2.		3	4,658
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	4,658
6	Credits/Payments			
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a		3,200
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments Add lines 6a through 6d.		7	3,200
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed <input type="checkbox"/>		9	1,458
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid <input type="checkbox"/>		10	
11	Enter the amount of line 10 to be Credited to 2013 estimated tax <input type="checkbox"/>	Refunded <input type="checkbox"/>	11	

Part 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 or intervene in any political campaign?		Yes	No
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?		Yes	No
	<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>			
1c	Did the foundation file Form 1120-POL for this year?		Yes	No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
(1)	On the foundation <input type="checkbox"/> \$ _____ 0	(2)	On foundation managers <input type="checkbox"/> \$ _____ 0	
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		Yes	No
	<i>If "Yes," attach a detailed description of the activities.</i>			
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? <i>If "Yes," attach a conformed copy of the changes</i>		Yes	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		Yes	No
b	If "Yes," has it filed a tax return on Form 990-T for this year?		Yes	No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		Yes	No
	<i>If "Yes," attach the statement required by General Instruction T.</i>			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
	● By language in the governing instrument, or			
	● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?			
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>		Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)			
	<input type="checkbox"/> NJ			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> <input type="checkbox"/>		Yes	No
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		Yes	No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		Yes	No

Part VII-A Statements Regarding Activities (continued)

11		No
12		No
13	Yes	

Website address ► N/A

14	The books are in care of ► HEART INSTITUTE OF SOUTHERN NJ	Telephone no ► (856) 216-0300
	Located at ► 1400 E ROUTE 70 CHERRY HILL NJ	ZIP +4 ► 080342230

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ►	15
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16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16
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See instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ►

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

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

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

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

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

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

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

2. List all officers, directors, trustees, foundation managers and their compensation (See instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account other allowances
HARVEY L WAXMAN MD 50 E OAK AVENUE MOORESTOWN, NJ 08057	PRES/TREAS/BOARD MEMBER 5 00	0	0	
WILLIAM J UNTEREKER MD 2200 ARCH ST 1213 PHILADELPHIA, PA 19103	VICE PRES/BOARD MEMBER 0 00	0	0	
MICHAEL SHEERIN 8 ANNAPOLIS ROAD MARLTON, NJ 08053	BOARD MEMBER 0 00	0	0	

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	6,069,281
b	Average of monthly cash balances.	1b	498,720
c	Fair market value of all other assets (see instructions).	1c	2,305,258
d	Total (add lines 1a, b, and c).	1d	8,873,259
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	8,873,259
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	133,099
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	8,740,160
6	Minimum investment return. Enter 5% of line 5.	6	437,008

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ► and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	437,008
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	4,658
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	4,658
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	432,350
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	432,350
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	432,350

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	448,250
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	3a	
a	Suitability test (prior IRS approval required).	3b	
b	Cash distribution test (attach the required schedule).	4	448,250
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	5	4,658
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	6	443,592
6	Adjusted qualifying distributions. Subtract line 5 from line 4.		

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				432,350
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.			438,474	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2012				
a From 2007.				
b From 2008.				
c From 2009.				
d From 2010.				
e From 2011.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2012 from Part XII, line 4 ► \$ _____ 448,250				
a Applied to 2011, but not more than line 2a			438,474	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2012 distributable amount.			9,776	
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				422,574
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)	0			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2008.				
b Excess from 2009.				
c Excess from 2010.				
d Excess from 2011.				
e Excess from 2012.				

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

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

1 Information Regarding Foundation Managers

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

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

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

- a** The name, address, and telephone number of the person to whom applications should be addressed
- b** The form in which applications should be submitted and information and materials they should include
- c** Any submission deadlines
- d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			► 3a	448,250
b Approved for future payment				
Total			► 3b	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income	Excluded by section 512, 513, or 514	(e) Related or exempt function income (See instructions)	
		(a) Business code	(b) Amount		(c) Exclusion code
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments			14	19,335	
4 Dividends and interest from securities.			14	142,764	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.			16	214,285	
6 Net rental income or (loss) from personal property					
7 Other investment income.			14	4,649	
8 Gain or (loss) from sales of assets other than inventory			14	84,726	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory.					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e).			0	465,759	0
13 Total. Add line 12, columns (b), (d), and (e).				13	465,759

(See worksheet in line 13 instructions to verify calculations)

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
12644 072 SHS HARTFORD SHT DURATION FUND C	P		2012-07-30
50000 SHS GENL ELEC CAP CORP B CLD	P		2012-12-17
38069 263 SHS BLACKROCK CORE BOND PRTFL A	P		2013-01-29
1140 424 SHS BLACKROCK CORE BOND PRTFL A	P		2013-01-29
20000 393 SHS LOOMIS SAYLES CR PLS BD C	P		2013-01-29
23195 SHS LOOMIS SAYLES CR PLS BD C	P		2013-05-30
1770 497 SHS LOOMIS SAYLES CR PLS BD C	P		2013-05-30
68 SHS LOOMIS SAYLES CR PLS BD C	P		2013-06-10
CAPITAL GAINS DIVIDENDS	P		

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
126,188		125,039	1,149
50,000		49,500	500
371,556		359,407	12,149
11,131		11,034	97
267,405		232,861	34,544
306,406		289,151	17,255
23,388		23,683	-295
887		911	-24
19,351			19,351

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			1,149
			500
			12,149
			97
			34,544
			17,255
			-295
			-24
			19,351

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CHERRY HILL EDUCATION FOUNDATION PO BOX 3701 CHERRY HILL, NJ 08034			SUPPORT EDUCATION OF PUBLIC SCHOOL CHILDREN OF TOWNSHIP OF CHERRY HILL	3,000
BRIAN ANDERSON MEMORIAL FUND 4 GRENLOCH CT SEWELL, NJ 08080			MISCELLANEOUS CHARITABLE DONATION	250
CAPE REGIONAL MED CTR FOUNDATION 2 STONE HARBOR BLVD CAPE MAY COURT HOUSE, NJ 08210			SUPPORT CANCER CARE PROGRAM	2,500
PRESBYTERIAN MEDICAL CENTER OF THE UNIV OF PENNSYLVANIA HEALTH SYSTEM 39TH AND MARKET STREETS PHILADELPHIA, PA 19104			SUPPORT CARDIOLOGY RESEARCH, EDUCATION AND PATIENT C	412,500
JOHN PAUL II REGIONAL SCHOOL 55 WARWICK RD STRATFORD, NJ 08084			SUPPORT EDUCATION FOR MIDDLE SCHOOLE EXPLORATORIES HEALTH SCIENCE PROGRAM	10,000
SHORE MEMORIAL HEALTH FOUNDATION 1 E NEWYORK AVENUE SOMERS POINT, NJ 08244			SUPPORT CARDIOLOGY RESEARCH, EDUCATION AND PATIENT C	20,000
Total			► 3a	448,250

TY 2012 Accounting Fees Schedule

Name: HEART INSTITUTE OF SOUTHERN NEW JERSEY

EIN: 22-2574758

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ZOOK DINON PA	34,781	0		0

TY 2012 Explanation of Non-Filing with Attorney General Statement

Name: HEART INSTITUTE OF SOUTHERN NEW JERSEY

EIN: 22-2574758

Statement: THE STATE OF NEW JERSEY'S CRI ACT PERMITS CHARITABLE ORGANIZATIONS RECEIVING ANNUAL GROSS CONTRIBUTIONS OF \$10,000 OR LESS TO CHOOSE WHETHER OR NOT THEY WISH TO MAINTAIN A REGISTRATION WITH THE N.J. CHARITIES REGISTRATION SECTION. THE ORGANIZATION IS NOT REQUIRED TO REMIT A COPY OF FORM 990PF IF THEY DO NOT REGISTER WITH THE STATE.

TY 2012 Investments - Other Schedule**Name:** HEART INSTITUTE OF SOUTHERN NEW JERSEY**EIN:** 22-2574758

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MUTUAL FUNDS AT MERRILL LYNCH	AT COST	5,704,137	6,263,884
CORPORATE BONDS	AT COST	350,000	367,815
ALTERNATIVE INVESTMENTS	AT COST	207,544	188,730

TY 2012 Legal Fees Schedule

Name: HEART INSTITUTE OF SOUTHERN NEW JERSEY

EIN: 22-2574758

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
NORRIS MC LAUGHLIN & MARCUS, P A	3,323	0		0

TY 2012 Other Assets Schedule

Name: HEART INSTITUTE OF SOUTHERN NEW JERSEY**EIN:** 22-2574758

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DUE FROM AFFILIATES	16,757	2,010	0
DEPOSIT ON HVAC UNIT	40,000	0	0

TY 2012 Other Expenses Schedule

Name: HEART INSTITUTE OF SOUTHERN NEW JERSEY**EIN:** 22-2574758

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK CHARGES	66	0		0
CONSULTING	49,992	0		0
OUTSIDE HELP	6,600	0		0
SUPPLIES	47	0		0
LICENSES AND FEES	122	0		0
GIFTS	252	0		0
UTILITES	60,456	60,456		0
REPAIRS AND MAINTENANCE	56,027	56,027		0
INSURANCE	8,191	8,191		0
LICENSES AND FEES	400	400		0
LAWN MAINTENANCE	74	74		0
INSPECTION FEE	358	358		0

TY 2012 Other Income Schedule

Name: HEART INSTITUTE OF SOUTHERN NEW JERSEY**EIN:** 22-2574758

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
INTEREST INCOME - GOLD SPOT INVESTMENT	4,649	4,649	4,649

TY 2012 Taxes Schedule

Name: HEART INSTITUTE OF SOUTHERN NEW JERSEY**EIN:** 22-2574758

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
6/30/13 990PF ESTIMATED TAX PAYMENTS	1,963	0		0
REAL ESTATE TAXES	76,764	76,764		0