



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



Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.

▶ Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation THE YACOV AND RITA MARMURSTEIN CHARITABLE FOUNDATION TRUST % RITA MARMURSTEIN		A Employer identification number 11-6532361	
Number and street (or P O box number if mail is not delivered to street address) 5307 17TH AVENUE Suite		B Telephone number (see instructions) (718) 875-8200	
City or town, state or province, country, and ZIP or foreign postal code BROOKLYN, NY 11204		C If exemption application is pending, check here ▶ ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ▶ ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 8,954,582		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	6,675,555			
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	26,366	26,366		
	4 Dividends and interest from securities.				
	5a Gross rents	1,778,699	1,778,699		
	b Net rental income or (loss) _____ 1,550,154				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a _____				
	7 Capital gain net income (from Part IV , line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	8,480,620	1,805,065		
	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	210	210	0	0
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	210			
	19 Depreciation (attach schedule) and depletion	66,768	66,768		
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	212,534	169,815		500
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	279,722	236,793	0	500
	25 Contributions, gifts, grants paid	1,826,270			1,826,270
	26 Total expenses and disbursements. Add lines 24 and 25	2,105,992	236,793	0	1,826,770
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	6,374,628			
	b Net investment income (if negative, enter -0-)		1,568,272		
	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	5,086,703	454,493	454,493
	2	Savings and temporary cash investments			
	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 instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ 499,900 Less allowance for doubtful accounts ▶ _____	499,900	499,900	499,900
	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 ▶ _____ 9,163,860 Less accumulated depreciation (attach schedule) ▶ _____ 66,768		9,097,092	6,000,000
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ 2,000,000 Less accumulated depreciation (attach schedule) ▶ _____		2,000,000	2,000,000
15	Other assets (describe ▶ _____)	189	189	189	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	5,586,792	12,051,674	8,954,582	
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 ▶ _____)		90,254	
	23	Total liabilities (add lines 17 through 22)		90,254	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	5,586,792	11,961,420	
	30	Total net assets or fund balances (see page 17 of the instructions)	5,586,792	11,961,420	
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	5,586,792	12,051,674		

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	5,586,792
2	Enter amount from Part I, line 27a	2	6,374,628
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	11,961,420
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	11,961,420

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) 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		
a				
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	
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))
2012	2,447,280	4,384,148	0 558211
2011	573,778	2,957,844	0 193985
2010	572,630	3,111,298	0 184049
2009	670,319	3,754,272	0 178548
2008	199,420	742,836	0 268458
2	Total of line 1, column (d).		2 1 383251
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 27665
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.		4 5,627,771
5	Multiply line 4 by line 3.		5 1,556,923
6	Enter 1% of net investment income (1% of Part I, line 27b).		6 15,683
7	Add lines 5 and 6.		7 1,572,606
8	Enter qualifying distributions from Part XII, line 4.		8 3,826,770
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 VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		1	15,683	
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)						
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2		
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-)				
3		Add lines 1 and 2.		3	15,683	
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4		
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	15,683	
6		Credits/Payments		7		
a	2013 estimated tax payments and 2012 overpayment credited to 2013		6a			
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	0	
8		Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	5	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	15,688	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10		
11		Enter the amount of line 10 to be Credited to 2014 estimated tax Refunded		11		

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? 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.	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ _____ (2) On foundation managers \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions): NY			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	10	Yes	

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address				
14	The books are in care of RITA MARMURSTEIN Telephone no (718) 438-0333 Located at 5307 17TH AVENUE BROOKLYN NY ZIP+4 11204			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2013, 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	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (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 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? 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).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
b	If "Yes," did it have excess business holdings in 2013 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 2013.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

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

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

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
YAKOV MARMURSTEIN	TRUSTEE	0	0	0
5307 17TH AVENUE BROOKLYN, NY 11204	0			
RITA MARMURSTEIN	TRUSTEE	0	0	0
5307 17TH AVENUE BROOKLYN, NY 11204	0			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Total number of other employees paid over \$50,000.				

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

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3	

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	0
b	Average of monthly cash balances.	1b	2,213,384
c	Fair market value of all other assets (see instructions).	1c	3,500,089
d	Total (add lines 1a, b, and c).	1d	5,713,473
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	5,713,473
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	85,702
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	5,627,771
6	Minimum investment return. Enter 5% of line 5.	6	281,389

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	281,389
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	15,683
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	15,683
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	265,706
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	265,706
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	265,706

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	1,826,770
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	2,000,000
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	3,826,770
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	15,683
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	3,811,087
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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				265,706
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 2011 , 2010 , 2009		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.	162,687			
b From 2009.	482,904			
c From 2010.	419,465			
d From 2011.	427,669			
e From 2012.	2,228,493			
f Total of lines 3a through e.	3,721,218			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 3,826,770				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2013 distributable amount.				265,706
e Remaining amount distributed out of corpus	3,561,064			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	7,282,282			
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.				
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . .	162,687			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	7,119,595			
10 Analysis of line 9				
a Excess from 2009. . . .	482,904			
b Excess from 2010. . . .	419,465			
c Excess from 2011. . . .	427,669			
d Excess from 2012. . . .	2,228,493			
e Excess from 2013. . . .	3,561,064			

Part XIV

4942(j)(3) or 4942(j)(5)

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .

c "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV

1

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

JACOB RITA MARMURSTEIN

• 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

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	1,826,270
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

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				
AMERICAN FRIENDS OF VISHNITZ 600 BOND STREET BRIDGEPORT,CT 06610	NONE	PC	CHARITABLE	18,000
MERKAZ CHASIDEI VIZNITZ 285 LEE AVE BROOKLYN,NY 11206	NONE	PC	CHARITABLE	90,000
YESHIVA GEDOLAH PASSAIC 35 ASCENSION STREET PASSAIC,NJ 07055	NONE	PC	CHARITABLE	10,000
BNEI YERUSHLAYIM 6 ELAINE PL SPRING VALLEY,NY 10977	NONE	PC	CHARITABLE	56,000
TIFERET ISRAEL 10909 HILLCREST ROAD DALLAS,TX 75230	NONE	PC	CHARITABLE	19,900
CONGREGATION BRIZDOWITZ 1721 58TH STREET BROOKLYN,NY 11204	NONE	PC	CHARITABLE	18,900
HEICHAL YITZCHOK 4403 15TH AVENUE BROOKLYN,NY 11219	NONE	PC	CHARITABLE	500
AMERICAN FRIENDS OF CHAYIM LAYELED 803 EAST 3RD STREET BROOKLYN,NY 11218	NONE	PC	CHARITABLE	6,800
AMERICAN FRIENDS OF DARCHEI HILLEL 1350 EAST 31ST STREET BROOKLYN,NY 11210	NONE	PC	CHARITABLE	360
AMERICAN FRIENDS OF SIFSEI TZADIK 1846 49TH STREET BROOKLYN,NY 11204	NONE	PC	CHARITABLE	500
BAIS HATAVSHIL 636 7TH STREET LAKEWOOD,NJ 08701	NONE	PC	CHARITABLE	55,000
BIRCHAT SHLOMO 5001 NEW UTRECHT AVE BROOKLYN,NY 11219	NONE	PC	CHARITABLE	1,000
BNEI PINCHAS 621 DAHILL ROAD BROOKLYN,NY 11218	NONE	PC	CHARITABLE	360
CHAMOL 420 MONMOUTH ST LAKEWOOD,NJ 08701	NONE	PC	CHARITABLE	1,000
CONGREGATION BAIS AHARON PO BOX 57 MONSEY,NY 10952	NONE	PC	CHARITABLE	500
Total  3a				1,826,270

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 <i>Paid during the year</i>				
CONGREGATION EM KOL CHAI 4321 17TH AVENUE BROOKLYN,NY 11204	NONE	PC	CHARITABLE	200,000
CONGREGATION NACHLAS DOVID 1589 EAST 28TH STREET BROOKLYN,NY 11229	NONE	PC	CHARITABLE	750,000
CONGREGATION SHONEH HALACHA 1719 56TH STREET BROOKLYN,NY 11204	NONE	PC	CHARITABLE	1,200
CONGREGATION TIFERES YECHZKEL 1379 58TH STREET BROOKLYN,NY 11219	NONE	PC	CHARITABLE	1,000
DERECH HATORAH 2810 NOSTRAND AVENUE BROOKLYN,NY 11229	NONE	PC	CHARITABLE	500
KNESSET SHRAGA 4120 16TH AVE BROOKLYN,NY 11218	NONE	PC	CHARITABLE	250
KOLLEL OHR YAAKOV YOSEF 3054 BEDFORD AVENUE BROOKLYN,NY 11210	NONE	PC	CHARITABLE	51,800
SHOMRIM 3618 14TH AVENUE BROOKLYN,NY 11218	NONE	PC	CHARITABLE	2,900
YISMACH LEV 1431 45TH STREET BROOKLYN,NY 11219	NONE	PC	CHARITABLE	72,600
BIRKAT YITZCHOK 5518 15TH AVE BROOKLYN,NY 11219	NONE	PC	CHARITABLE	1,800
CONGREGATION SD 1320 CONEY ISLAND AVE BROOKLYN,NY 11219	NONE	PC	CHARITABLE	4,500
GAURD YOUR EYES PO BOX 32380 PIKESVILLE,MD 21282	NONE	PC	CHARITABLE	20,000
AHAVAS CHESED GROUP 720 LEFFERTS AVENUE BROOKLYN,NY 11203	NONE	PC	CHARITABLE	1,800
AMERICAN FRIENDS OF AHAVAT TORAH 4612 12TH AVE BROOKLYN,NY 11219	NONE	PC	CHARITABLE	1,800
AMERICAN FRIENDS OF MESHI 666 WEST 188TH STREET NEW YORK,NY 10040	NONE	PC	CHARITABLE	56,000
Total  3a				1,826,270

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 <i>Paid during the year</i>				
AMERICAN FRIEDNS OF NACHLEI DAAS 599 WARREN ST LAKEWOOD,NJ 08701	NONE	PC	CHARITABLE	500
ANSHE MA'AMED 1271 54TH STREET BROOKLYN,NY 11219	NONE	PC	CHARITABLE	500
ARMOT TORAH 754 KEAP ST BROOKLYN,NY 11210	NONE	PC	CHARITABLE	10,000
BEIT MIDRASH GOVAAH 601 PRIVATE WAY LAKEWOOD,NJ 08701	NONE	PC	CHARITABLE	200,000
BIKUR VEZRAT CHOLIM 4303 15TH AVENUE BROOKLYN,NY 11219	NONE	PC	CHARITABLE	1,800
CHASDEI ELIEZER 5309 17TH AVENUE BROOKLYN,NY 11204	NONE	PC	CHARITABLE	11,800
CONG AHAVAS TZOKODAH VCHESD 5323 12TH AVENUE BROOKLYN,NY 11219	NONE	PC	CHARITABLE	10,000
HATZALAH 1340 EAST 9TH STREET BROOKLYN,NY 11230	NONE	PC	CHARITABLE	5,000
YESHIVA CHACMEI LUBLIN 4710 13TH AVE BROOKLYN,NY 11219	NONE	PC	CHARITABLE	3,600
MAOROT 962 51ST STREET BROOKLYN,NY 11219	NONE	PC	CHARITABLE	500
MENUCHA U'KEDUSHA 1756 46TH STREET BROOKLYN,NY 11204	NONE	PC	CHARITABLE	1,000
MERKAZ HATORAH 9030 W OLYMPIC BLVD BEVERLY HILLS,CA 90211	NONE	PC	CHARITABLE	30,000
MIFAL EZRA ZICHRON YEHUDA 481 PARK AVENUE BROOKLYN,NY 11205	NONE	PC	CHARITABLE	37,000
RCCS 768 BEDFORD AVENUE BROOKLYN,NY 11205	NONE	PC	CHARITABLE	7,400
CONGREGATION HAYOSHER 1355 45TH STREET BROOKLYN,NY 11219	NONE	PC	CHARITABLE	1,000
Total  3a				1,826,270

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 <i>Paid during the year</i>				
UNITED MOSDOS TORAH VEYIRAH YERUSHOLYIM 780 KEAP ST BROOKLYN, NY 11219	NONE	PC	CHARITABLE	56,000
YESHIVA GEDOLA OHR YISRAEL 2940 AVENUE P BROOKLYN, NY 11229	NONE	PC	CHARITABLE	200
AMERICAN FRIENDS OF ZICHRON NACHUM 1655 45TH STREET BROOKLYN, NY 11204	NONE	PC	CHARITABLE	5,000
Total  3a				1,826,270

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.	OMB No 1545-0047 2013

Name of the organization THE YACOV AND RITA MARMURSTEIN CHARITABLE FOUNDATION TRUST	Employer identification number 11-6532361
---	---

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

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

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed

Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

[illegible]

Name of organization THE YACOV AND RITA MARMURSTEIN CHARITABLE FOUNDATION TRUST	Employer identification number 11-6532361
--	---

Part III

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

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

Use duplicate copies of Part III if additional space is needed

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

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

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

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

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2013 Depreciation Schedule

Name: THE YACOV AND RITA MARMURSTEIN CHARITABLE
FOUNDATION TRUST

EIN: 11-6532361

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
BUILDING-700 ROCKA	2013-06-12	4,800,000		M39	39	66,768			

TY 2013 Investments - Land Schedule

Name: THE YACOV AND RITA MARMURSTEIN CHARITABLE
FOUNDATION TRUST

EIN: 11-6532361

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
BUILDING-700 ROCKA	4,800,000		4,733,232	

TY 2013 Land, Etc. Schedule

Name: THE YACOV AND RITA MARMURSTEIN CHARITABLE
FOUNDATION TRUST

EIN: 11-6532361

TY 2013 Legal Fees Schedule

Name: THE YACOV AND RITA MARMURSTEIN CHARITABLE
FOUNDATION TRUST
EIN: 11-6532361

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	210	210		

TY 2013 Other Assets Schedule

Name: THE YACOV AND RITA MARMURSTEIN CHARITABLE
FOUNDATION TRUST
EIN: 11-6532361

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
LOANS AND EXCHANGES	189	189	189

TY 2013 Other Expenses Schedule

Name: THE YACOV AND RITA MARMURSTEIN CHARITABLE
FOUNDATION TRUST

EIN: 11-6532361

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEES	500			500
BANK FEES	1,247	1,247		
INSURANCE	42,219			
PROFESSIONAL FEES	7,000	7,000		
INSURANCE-OTHER	7,000	7,000		
MANAGEMENT FEES	51,960	51,960		
REPAIRS	19,167	19,167		
REAL ESTATE TAXES	45,162	45,162		
UTILITIES	36,809	36,809		
SUPPLIES	675	675		
BANK CHARGE	179	179		
TELEPHONE	616	616		

TY 2013 Other Liabilities Schedule

Name: THE YACOV AND RITA MARMURSTEIN CHARITABLE
FOUNDATION TRUST

EIN: 11-6532361

Description	Beginning of Year - Book Value	End of Year - Book Value
SECURITY DEPOSITS		90,254

TY 2013 Other Notes/Loans
Receivable Short Schedule

Name: THE YACOV AND RITA MARMURSTEIN CHARITABLE
FOUNDATION TRUST
EIN: 11-6532361

Name of 501(c)(3) Organization	Balance Due
SBH LLC	499,900

TY 2013 Taxes Schedule

Name: THE YACOV AND RITA MARMURSTEIN CHARITABLE
FOUNDATION TRUST
EIN: 11-6532361

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	210			

TY 2013 IRS Payment

Name: THE YACOV AND RITA MARMURSTEIN CHARITABLE
FOUNDATION TRUST

EIN: 11-6532361

Routing Transit Number: 026013576

Bank Account Number: 1501758163

Type of Account: Checking

**Payment Amount in Dollars and
Cents:** 15,688

Requested Payment Date: 2014-11-14

**Taxpayer's Daytime Phone
Number:** (718) 875-8200