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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 WHITNEY AND ANNE STONE FOUNDATION		A Employer identification number 13-3394681	
Number and street (or P O box number if mail is not delivered to street address) C/O SILVERCREST 614 E HIGH ST		B Telephone number (see instructions) (434) 977-4420	
City or town, state or province, country, and ZIP or foreign postal code CHARLOTTESVILLE, VA 22902		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input checked="" type="checkbox"/> \$ 4,441,310	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	100,707	100,707		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	351,322			
	b Gross sales price for all assets on line 6a 965,013				
	7 Capital gain net income (from Part IV, line 2) . . .		351,322		
	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)	25	25		
	12 Total. Add lines 1 through 11	452,054	452,054		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	46,210	37,063		9,147
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	9,000			
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	1,049	1,049		
	24 Total operating and administrative expenses. Add lines 13 through 23	56,259	38,112		9,147
	25 Contributions, gifts, grants paid	200,000			200,000
	26 Total expenses and disbursements. Add lines 24 and 25	256,259	38,112		209,147
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	195,795			
	b Net investment income (if negative, enter -0-)		413,942		
	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	63,951	10,293	10,293
	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) ▶ _____ 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)	2,296,517	<input checked="" type="checkbox"/> 2,492,980	3,601,459
	c	Investments—corporate bonds (attach schedule).	144,716	<input checked="" type="checkbox"/> 163,812	196,616
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	373,083	<input checked="" type="checkbox"/> 373,083	632,942
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,878,267	3,040,168	4,441,310
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	1,483,061	1,483,061	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	1,395,206	1,557,107	
	30	Total net assets or fund balances (see page 17 of the instructions)	2,878,267	3,040,168	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,878,267	3,040,168	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	2,878,267
2	Enter amount from Part I, line 27a	2	195,795
3	Other increases not included in line 2 (itemize) ▶ _____ <input checked="" type="checkbox"/>	3	5,122
4	Add lines 1, 2, and 3	4	3,079,184
5	Decreases not included in line 2 (itemize) ▶ _____ <input checked="" type="checkbox"/>	5	39,016
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,040,168

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)
1 a	PUBLICLY TRADED SECURITIES	P		
b	PUBLICLY TRADED SECURITIES	P		
c	S SELECT GROWTH EQUITY FUND - K-1	P		
d	S SELECT GROWTH EQUITY FUND - K-1	P		
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 45,663		35,713	9,950
b 870,716		577,978	292,738
c 184			184
d 41,433			41,433
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			9,950
b			292,738
c			184
d			41,433
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	351,322
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	10,134

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	191,222	3,486,700	0 054843
2011	216,939	3,458,127	0 062733
2010	248,256	3,171,279	0 078283
2009	185,766	2,818,795	0 065903
2008	176,000	3,734,075	0 047133

2 Total of line 1, column (d).	2	0 308895
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 061779
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	4,057,337
5 Multiply line 4 by line 3.	5	250,658
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	4,139
7 Add lines 5 and 6.	7	254,797
8 Enter qualifying distributions from Part XII, line 4. If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	209,147

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		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	8,279
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	
3 Add lines 1 and 2.	3	8,279
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	8,279
6 Credits/Payments		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	5,653
b Exempt foreign organizations—tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	3,000
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d.	7	8,653
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	9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	374
11 Enter the amount of line 10 to be Credited to 2014 estimated tax 374 Refunded	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?	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)? <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>	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 <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T.</i>	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? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions): <input type="checkbox"/> VA _____			
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>	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)? <i>If "Yes," complete Part XIV</i>	9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

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 N/A				
14	The books are in care of SILVERCREST ASSET MANAGEMENT GROUP Telephone no (434) 977-4420 Located at 614 E HIGH ST CHARLOTTESVILLE VA ZIP+4 22902			
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? <input type="checkbox"/> 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?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> 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)?. <input type="checkbox"/> 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). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. Organizations relying on a current notice regarding disaster assistance check here. <input checked="" type="checkbox"/>	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		
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____ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
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?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>)	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))?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(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	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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).		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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.		<input checked="" type="checkbox"/>		
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	
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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		
If "Yes" to 6b, file Form 8870.		No		
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	
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
DAVID J WOOD JR 	TRUSTEE	0	0	0
C/O SILVERCREST 614 E HIGH ST CHARLOTTESVILLE,VA 22902	2 00			
MARY MINOR HENDERSON 	TRUSTEE	0	0	0
C/O SILVERCREST 614 E HIGH ST CHARLOTTESVILLE,VA 22902	2 00			
ELIZABETH WOOD 	TRUSTEE	0	0	0
C/O SILVERCREST 614 E HIGH ST CHARLOTTESVILLE,VA 22902	2 00			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

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		
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 N/A	
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	4,005,644
b	Average of monthly cash balances.	1b	113,480
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	4,119,124
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	
3	Subtract line 2 from line 1d.	3	4,119,124
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	61,787
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,057,337
6	Minimum investment return. Enter 5% of line 5.	6	202,867

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	202,867
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	8,279
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	8,279
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	194,588
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	194,588
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	194,588

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	209,147
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	209,147
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	209,147
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				194,588
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				14,639
e From 2012.				22,411
f Total of lines 3a through e.	37,050			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 209,147				
a Applied to 2012, but not more than line 2a				
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.				194,588
e Remaining amount distributed out of corpus	14,559			
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	51,609			
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 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
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). . .				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	51,609			
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				14,639
d Excess from 2012. . . .				22,411
e Excess from 2013. . . .				14,559

Part XIV

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling. . . .

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

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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 <i>Paid during the year</i> See Additional Data Table				
Total			3a	200,000
b <i>Approved for future payment</i>				
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 <i>Paid during the year</i>				
ALBEMARLE CHARLOTTESVILLE HISTORICA ALBEMARLE CHARLOTTESVILLE HISTORICAL SOCIETY 200 2ND STREET NE 200 2ND STREET NE CHARLOTTESVILLE,VA 229025245	NONE	PUBLIC	GENERAL	2,000
ALZHEIMER'S ASSOCIATION ALZHEIMER'S ASSOCIATION 1160 PEPSI PLACE SUITE 3 1160 PEPSI PLACE SUITE 3 CHARLOTTESVILLE,VA 22901	NONE	PUBLIC	GENERAL	2,000
AMERICAN RED CROSS AMERICAN RED CROSS 1105 ROSE HILL DRIVE 1105 ROSE HILL DRIVE CHARLOTTESVILLE,VA 22903	NONE	PUBLIC	GENERAL	5,000
BLUE RIDGE AREA FOOD BANK BLUE RIDGE AREA FOOD BANK 1207 HARRIS STREET 1207 HARRIS STREET CHARLOTTESVILLE,VA 229066415	NONE	PUBLIC	GENERAL	4,000
BOYS & GIRLS CLUBS OF CENTRAL VIRGI BOYS & GIRLS CLUBS OF CENTRAL VIRGINIA PO BOX 707 PO BOX 707 CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	3,000
CAMP HOLIDAY TRAILS CAMP HOLIDAY TRAILS 400 HOLIDAY TRAILS LANE 400 HOLIDAY TRAILS LANE CHARLOTTESVILLE,VA 22903	NONE	PUBLIC	GENERAL	4,000
CHARLOTTESVILLE-ALBEMARLE RESCUE SQ CHARLOTTESVILLE-ALBEMARLE RESCUE SQUAD INC 828 MCINTIRE ROAD 828 MCINTIRE ROAD CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	5,000
CHARLOTTESVILLE-ALBEMARLE SPCA CHARLOTTESVILLE-ALBEMARLE SPCA PO BOX 7047 PO BOX 7047 CHARLOTTESVILLE,VA 22906	NONE	PUBLIC	GENERAL	3,000
CHARLOTTESVILLE AREA COMMUNITY FOUN CHARLOTTESVILLE AREA COMMUNITY FOUNDATION 114 4TH STREET SE 114 4TH STREET SE CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	5,000
CHARLOTTESVILLE AREA RIDING THERAPY CHARLOTTESVILLE AREA RIDING THERAPY (CART) 5924 FRIED FARM ROAD 5924 FRIED FARM ROAD CROZET,VA 22932	NONE	PUBLIC	GENERAL	3,000
CHARLOTTESVILLE FREE CLINIC CHARLOTTESVILLE FREE CLINIC 1138 ROSE HILL DRIVE SUI 1138 ROSE HILL DRIVE SUI CHARLOTTESVILLE,VA 22903	NONE	PUBLIC	GENERAL	5,000
CHARLOTTESVILLE LEGAL AID SOCIETY CHARLOTTESVILLE LEGAL AID SOCIETY PO BOX 12206 PO BOX 12206 RICHMOND,VA 23241	NONE	PUBLIC	GENERAL	1,000
CHESAPEAKE BAY FOUNDATION CHESAPEAKE BAY FOUNDATION 6 HERNDON AVENUE 6 HERNDON AVENUE ANNAPOLIS,MD 214034503	NONE	PUBLIC	GENERAL	2,000
EPISCOPAL HIGH SCHOOL EPISCOPAL HIGH SCHOOL 1200 NORTH QUAKER LN 1200 NORTH QUAKER LN ALEXANDRIA,VA 22302	NONE	PUBLIC	GENERAL	10,000
FAIRHUNT FARM FAIRHUNT FARM PO BOX 819 PO BOX 819 SCOTTSVILLE,VA 24590	NONE	PUBLIC	GENERAL	3,000
Total  3a				200,000


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				
FOOTHILLS CHILD ADVOCACY CENTER FOOTHILLS CHILD ADVOCACY CENTER 1106 E HIGH ST SUITE 10 1106 E HIGH ST SUITE 10 CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	4,000
THE GRIER SCHOOL THE GRIER SCHOOL PO BOX 308 PO BOX 308 TYRONE,PA 16686	NONE	PUBLIC	GENERAL	1,000
HABITAT FOR HUMANITY OF GREATER CHA HABITAT FOR HUMANITY OF GREATER CHARLOTTESVILLE 501 GROVE AVENUE 501 GROVE AVENUE CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	2,000
HOSPICE OF THE PIEDMONT HOSPICE OF THE PIEDMONT 675 PETER JEFFERSON PARKW 675 PETER JEFFERSON PARKW CHARLOTTESVILLE,VA 22911	NONE	PUBLIC	GENERAL	5,000
JEFFERSON AREA BOARD FOR AGING INC JEFFERSON AREA BOARD FOR AGING INC (JABA) 674 HILLSDALE DRIVE SUIT 674 HILLSDALE DRIVE SUIT CHARLOTTESVILLE,VA 22901	NONE	PUBLIC	GENERAL	2,000
MARTHA JEFFERSON HOSPITAL FOUNDATIO MARTHA JEFFERSON HOSPITAL FOUNDATION 500 MARTHA JEFFERSON DRIV 500 MARTHA JEFFERSON DRIV CHARLOTTESVILLE,VA 22911	NONE	PUBLIC	GENERAL	10,000
MEALS ON WHEELS OF CHARLOTTESVILLE MEALS ON WHEELS OF CHARLOTTESVILLE/ALBEMARLE 2270 IVY ROAD 2270 IVY ROAD CHARLOTTESVILLE,VA 22903	NONE	PUBLIC	GENERAL	3,000
MILLER CENTER FOUNDATION - UVA MILLER CENTER FOUNDATION - UVA PO BOX 400807 PO BOX 400807 CHARLOTTESVILLE,VA 229074406	NONE	PUBLIC	GENERAL	3,000
MILLER SCHOOL OF ALBEMARLE MILLER SCHOOL OF ALBEMARLE 1000 SAMUEL MILLER LOOP 1000 SAMUEL MILLER LOOP CHARLOTTESVILLE,VA 22903	NONE	PUBLIC	GENERAL	4,000
MONTICELLO AREA COMMUNITY ACTION AG MONTICELLO AREA COMMUNITY ACTION AGENCY (MACAA) 1025 PARK STREET 1025 PARK STREET CHARLOTTESVILLE,VA 22901	NONE	PUBLIC	GENERAL	1,000
MUSIC RESOURCE CENTER MUSIC RESOURCE CENTER 105 RIDGE STREET 105 RIDGE STREET CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	1,000
THE NATURE CONSERVANCY THE NATURE CONSERVANCY 490 WESTFIELD ROAD 490 WESTFIELD ROAD CHARLOTTESVILLE,VA 229011633	NONE	PUBLIC	GENERAL	2,000
NORTH GARDEN VOLUNTEER FIRE COMPANY NORTH GARDEN VOLUNTEER FIRE COMPANY PO BOX 33 PO BOX 33 NORTH GARDEN,VA 22959	NONE	PUBLIC	GENERAL	3,000
PIEDMONT CASA PIEDMONT CASA 818 E HIGH STREET 818 E HIGH STREET CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	5,000
PIEDMONT ENVIRONMENTAL COUNCIL PIEDMONT ENVIRONMENTAL COUNCIL 410 EAST WATER ST SW SU 410 EAST WATER ST SW SU CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	2,000
Total  3a				200,000

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>				
PLANNED PARENTHOOD OF THE BLUE RIDG PLANNED PARENTHOOD OF THE BLUE RIDGE 2964 HYDRAULIC ROAD 2964 HYDRAULIC ROAD CHARLOTTESVILLE,VA 22901	NONE	PUBLIC	GENERAL	5,000
RONALD MCDONALD HOUSE CHARITIES OF RONALD MCDONALD HOUSE CHARITIES OF CHARLOTTESVILLE 300 9TH STREET SW 300 9TH STREET SW CHARLOTTESVILLE,VA 22903	NONE	PUBLIC	GENERAL	1,000
ST PAUL'S EPISCOPAL CHURCH ST PAUL'S EPISCOPAL CHURCH PO BOX 37 PO BOX 37 IVY,VA 22945	NONE	PUBLIC	GENERAL	24,000
THE SALVATION ARMY THE SALVATION ARMY 207 RIDGE ST 207 RIDGE ST CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	5,000
SENIOR CENTER SENIOR CENTER 1180 PEPSI PLACE 1180 PEPSI PLACE CHARLOTTESVILLE,VA 22901	NONE	PUBLIC	GENERAL	1,000
SERVICE DOGS OF VIRGINIA SERVICE DOGS OF VIRGINIA 811 PRESTON AVE 811 PRESTON AVE CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	2,000
SHELTER FOR HELP IN EMERGENCY SHELTER FOR HELP IN EMERGENCY PO BOX 1013 PO BOX 1013 CHARLOTTESVILLE,VA 22903	NONE	PUBLIC	GENERAL	2,000
SOUTHERN ENVIRONMENTAL LAW CENTER SOUTHERN ENVIRONMENTAL LAW CENTER 201 WEST MAIN STREET SUI 201 WEST MAIN STREET SUI CHARLOTTESVILLE,VA 229025065	NONE	PUBLIC	GENERAL	2,000
SPECIAL OLYMPICS GEORGIA SPECIAL OLYMPICS GEORGIA 4000 DEKALB TECH PARKWAY 4000 DEKALB TECH PARKWAY ATLANTA,GA 30340	NONE	PUBLIC	GENERAL	2,000
THOMAS JEFFERSON FOUNDATION - MONTI THOMAS JEFFERSON FOUNDATION - MONTICELLO ANNUAL FU PO BOX 316 PO BOX 316 CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	10,000
UNITED WAY - THOMAS JEFFERSON AREA UNITED WAY - THOMAS JEFFERSON AREA 806 EAST HIGH ST 806 EAST HIGH ST CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	15,000
UNIVERSITY OF VIRGINIA ALUMNI ASSOC UNIVERSITY OF VIRGINIA ALUMNI ASSOCIATION 400 RAY C HUNT DRIVE 400 RAY C HUNT DRIVE CHARLOTTESVILLE,VA 229074807	NONE	PUBLIC	GENERAL	1,000
UNIVERSITY OF VIRGINIA ART MUSEUM UNIVERSITY OF VIRGINIA ART MUSEUM 155 RUGBY ROAD 155 RUGBY ROAD CHARLOTTESVILLE,VA 229044119	NONE	PUBLIC	GENERAL	1,000
UNIVERSITY OF VIRGINIA CHILDRENS' M UNIVERSITY OF VIRGINIA CHILDRENS' MEDICAL CENTER 400 RAY C HUNT DRIVE 400 RAY C HUNT DRIVE CHARLOTTESVILLE,VA 229074807	NONE	PUBLIC	GENERAL	2,000
UNIVERSITY OF VIRGINIA FUND DONATIO UNIVERSITY OF VIRGINIA FUND DONATION (DKE) 400 RAY C HUNT DRIVE 400 RAY C HUNT DRIVE CHARLOTTESVILLE,VA 229074807	NONE	PUBLIC	GENERAL	1,000
Total  3a				200,000

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>				
UNIVERSITY OF VIRGINIA HEALTH FOUND UNIVERSITY OF VIRGINIA HEALTH FOUNDATION - MELANOM PO BOX 800773 PO BOX 800773 CHARLOTTESVILLE,VA 229080773	NONE	PUBLIC	GENERAL	5,000
UNIVERSITY OF VIRGINIA SCHOOL OF LA UNIVERSITY OF VIRGINIA SCHOOL OF LAW 580 MASSIE ROAD 580 MASSIE ROAD CHARLOTTESVILLE,VA 229031738	NONE	PUBLIC	GENERAL	1,000
VIRGINIA INSTITUTE OF AUTISM VIRGINIA INSTITUTE OF AUTISM 1414 WESTWOOD ROAD 1414 WESTWOOD ROAD CHARLOTTESVILLE,VA 22903	NONE	PUBLIC	GENERAL	2,000
WESTERN ALBEMARLE RESCUE SQUAD WESTERN ALBEMARLE RESCUE SQUAD PO BOX 188 PO BOX 188 CROZET,VA 22932	NONE	PUBLIC	GENERAL	5,000
WORKSOURCE ENTERPRISES WORKSOURCE ENTERPRISES 1311 CARLTON AVENUE 1311 CARLTON AVENUE CHARLOTTESVILLE,VA 22902	NONE	PUBLIC	GENERAL	2,000
THE VIRGINIA WOUNDED WARRIOR PROGRA THE VIRGINIA WOUNDED WARRIOR PROGRAM C/O VETERANS 900 EAST MAIN ST 6TH FL 900 EAST MAIN ST 6TH FL RICHMOND,VA 23219	NONE	PUBLIC	GENERAL	4,000
YOUNG LIFE YOUNG LIFE PO BOX 7962 PO BOX 7962 CHARLOTTESVILLE,VA 229067962	NONE	PUBLIC	GENERAL	2,000
Total  3a				200,000

TY 2013 Compensation Explanation

Name: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

Person Name	Explanation
DAVID J WOOD JR	
MARY MINOR HENDERSON	
ELIZABETH WOOD	

**TY 2013 Investments Corporate
Bonds Schedule**

Name: WHITNEY AND ANNE STONE FOUNDATION
EIN: 13-3394681

Name of Bond	End of Year Book Value	End of Year Fair Market Value
PORTFOLIO INVESTMENTS	163,812	196,616

**TY 2013 Investments Corporate
Stock Schedule**

Name: WHITNEY AND ANNE STONE FOUNDATION
EIN: 13-3394681

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PORTFOLIO INVESTMENTS	2,492,980	3,601,459

TY 2013 Investments - Other Schedule

Name: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
S. SELECT GROWTH EQUITY FUND	AT COST	373,083	632,942

TY 2013 Other Decreases Schedule**Name:** WHITNEY AND ANNE STONE FOUNDATION**EIN:** 13-3394681

Description	Amount
TIMING DIFFERENCES - K-1 NON-CASH ITEMS	38,116
TIMING DIFFERENCES - OTHER	900

TY 2013 Other Expenses Schedule**Name:** WHITNEY AND ANNE STONE FOUNDATION**EIN:** 13-3394681

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
BANK CUSTODY FEES	998	998		
FOREIGN TAX PAID - S SEL GRO	51	51		

TY 2013 Other Income Schedule

Name: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
B OF A LITIGATION PROCEEDS	16	16	
S SELECT GROWTH EQUITY K-1	9	9	

TY 2013 Other Increases Schedule**Name:** WHITNEY AND ANNE STONE FOUNDATION**EIN:** 13-3394681

Description	Amount
NONDIVIDEND DISTRIBUTIONS	4,167
TIMING DIFFERENCES - DIVIDENDS	955

TY 2013 Other Professional Fees Schedule**Name:** WHITNEY AND ANNE STONE FOUNDATION**EIN:** 13-3394681

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	20,599	20,599		
ACCOUNTING SERVICE FEE	18,295	9,148		9,147
PORTFOLIO EXPS - S SEL GROWTH	7,316	7,316		

TY 2013 Taxes Schedule

Name: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT EXCISE TAXES - '11 EX	9,000			