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Form **990-PF**

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

OMB No 1545-0052

**2013**

Department of the Treasury  
Internal Revenue Service

▶ Do not enter Social Security numbers on this form as it may be made public.  
▶ Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

Open to Public Inspection

**For calendar year 2013 or tax year beginning** , and ending

Name of foundation <b>BEN D. SPAGOLIO CHARITABLE TRUST C/O ROBERT N. BOHORAD, TRUSTEE</b>		A Employer identification number <b>13-7345617</b>
Number and street (or P O box number if mail is not delivered to street address) <b>1940 W. NORWEGIAN ST., PO BOX 1280</b>	Room/suite	B Telephone number (see instructions) <b>570-622-1811</b>
City or town, state or province, country, and ZIP or foreign postal code <b>POTTSVILLE PA 17901-7280</b>		C If exemption application is pending, check here ▶ <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1 Foreign organizations, check here ▶ <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation ▶ <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <b>270,407</b>	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ <input type="checkbox"/>

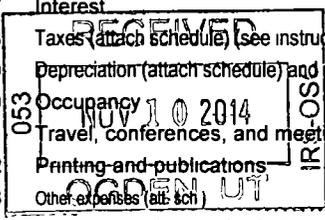
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	3,000			
	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	6,274	6,274		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	16,828			
	b Gross sales price for all assets on line 6a	16,828			
	7 Capital gain net income (from Part IV, line 2)		16,828		
	8 Net short-term capital gain			0	
	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)					
12 Total. Add lines 1 through 11	26,102	23,102	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 1	945			
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) STMT 2	111			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses (attach schedule) STMT 3	70				
24 Total operating and administrative expenses. Add lines 13 through 23	1,126	0	0	0	
25 Contributions, gifts, grants paid	10,418			10,418	
26 Total expenses and disbursements. Add lines 24 and 25	11,544	0	0	10,418	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	14,558				
b Net investment income (if negative, enter -0-)		23,102			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

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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	5,644	10,608	10,608
	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 (att schedule) ▶ Less allowance for doubtful accounts ▶	0		
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U S and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule) <b>SEE STMT 4</b>	186,678	196,272	259,799
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
15 Other assets (describe ▶)				
16 <b>Total assets</b> (to be completed by all filers – see the instructions Also, see page 1, item I)	192,322	206,880	270,407	
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 <b>Total liabilities</b> (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	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	192,322	206,880	
30 <b>Total net assets or fund balances</b> (see instructions)	192,322	206,880		
31 <b>Total liabilities and net assets/fund balances</b> (see instructions)	192,322	206,880		

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	192,322
2 Enter amount from Part I, line 27a	2	14,558
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	206,880
5 Decreases not included in line 2 (itemize) ▶	5	
6 <b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) – Part II, column (b), line 30	6	206,880

**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 <b>WADDELL &amp; REED CAP GAIN DIST</b>				
b <b>PUBLICLY TRADED SECURITIES</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 7,352			7,352	
b 62,929		53,454	9,476	
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				7,352
b				9,476
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 16,828
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 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	11,713	223,738	0.052351
2011	9,300	217,994	0.042662
2010	10,003	208,301	0.048022
2009	12,059	194,826	0.061896
2008	13,528	243,647	0.055523
2 Total of line 1, column (d)			2 0.260454
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 0.052091
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			4 244,411
5 Multiply line 4 by line 3			5 12,732
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 231
7 Add lines 5 and 6			7 12,963
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 10,418

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

<b>1a</b>	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>b</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	462
<b>c</b>	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0
<b>3</b>	Add lines 1 and 2	3	462
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0-	5	462
<b>6</b>	Credits/Payments		
<b>a</b>	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	
<b>b</b>	Exempt foreign organizations - tax withheld at source	6b	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	6c	
<b>d</b>	Backup withholding erroneously withheld	6d	
<b>7</b>	Total credits and payments Add lines 6a through 6d	7	
<b>8</b>	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter amount owed	9	462
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
<b>11</b>	Enter the amount of line 10 to be Credited to 2014 estimated tax Refunded	11	

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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?		X
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the 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		X
<b>c</b> Did the foundation file Form 1120-POL for this year?		X
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
<b>2</b> 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		X
<b>3</b> 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		X
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
<b>b</b> If "Yes," has it filed a tax return on Form 990-T for this year?		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
<b>6</b> 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?	X	
<b>7</b> 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	X	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) <b>PA</b>		
<b>b</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	X	
<b>9</b> 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		X
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

**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		X
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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	X	
14	The books are in care of ▶ <b>JAMES C. BOHORAD</b> <b>P.O. BOX 1280</b> Located at ▶ <b>POTTSVILLE</b> PA ZIP+4 ▶ <b>17901-7280</b> Telephone no ▶ <b>570-622-1811</b>			
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? See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶	16	Yes	No X

**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 instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/> N/A	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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? <input type="checkbox"/> 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 ) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013 ) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	4a	X
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	4b	X

**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)? **N/A**  **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? **N/A**  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**  Yes  No **X**

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? **N/A** **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
ROBERT N. BOHORAD P.O. BOX 1280	POTTSVILLE PA 17901-7280	TRUSTEE 2.00	0	0
JAMES C. BOHORAD P.O. BOX 1280	POTTSVILLE PA 17901-7280	TRUSTEE 2.00	0	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
NONE				

Total number of other employees paid over \$50,000 ▶ **0**

**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		
<b>Total number of others receiving over \$50,000 for professional services</b>		▶

**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.

1	Expenses
N/A	
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.

1	Amount	
N/A		
2		
All other program-related investments. See instructions.		
3		
<b>Total. Add lines 1 through 3</b>		▶

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	<b>241,943</b>
<b>b</b>	Average of monthly cash balances	<b>1b</b>	<b>6,190</b>
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	<b>0</b>
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	<b>248,133</b>
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	<b>0</b>
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	<b>0</b>
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	<b>248,133</b>
<b>4</b>	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see instructions)	<b>4</b>	<b>3,722</b>
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	<b>5</b>	<b>244,411</b>
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	<b>12,221</b>

**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)

<b>1</b>	Minimum investment return from Part X, line 6		<b>1</b>	<b>12,221</b>
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5	<b>2a</b>	<b>462</b>	
<b>b</b>	Income tax for 2013 (This does not include the tax from Part VI)	<b>2b</b>		
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	<b>462</b>	
<b>3</b>	Distributable amount before adjustments Subtract line 2c from line 1	<b>3</b>	<b>11,759</b>	
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>		
<b>5</b>	Add lines 3 and 4	<b>5</b>	<b>11,759</b>	
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>		
<b>7</b>	<b>Distributable amount as adjusted</b> Subtract line 6 from line 5 Enter here and on Part XIII, line 1	<b>7</b>	<b>11,759</b>	

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc – total from Part I, column (d), line 26	<b>1a</b>	<b>10,418</b>
<b>b</b>	Program-related investments – total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	<b>10,418</b>
<b>5</b>	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)	<b>5</b>	<b>0</b>
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	<b>10,418</b>

**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
<b>1</b> Distributable amount for 2013 from Part XI, line 7				<b>11,759</b>
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only			<b>9,905</b>	
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2013				
<b>a</b> From 2008				
<b>b</b> From 2009				
<b>c</b> From 2010				
<b>d</b> From 2011				
<b>e</b> From 2012				
<b>f</b> Total of lines 3a through e				
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ <u>10,418</u>				
<b>a</b> Applied to 2012, but not more than line 2a			<b>9,905</b>	
<b>b</b> Applied to undistributed income of prior years (Election required – see instructions)				
<b>c</b> Treated as distributions out of corpus (Election required – see instructions)				
<b>d</b> Applied to 2013 distributable amount				<b>513</b>
<b>e</b> Remaining amount distributed out of corpus				
<b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5				
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b				
<b>c</b> 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				
<b>d</b> Subtract line 6c from line 6b Taxable amount – see instructions				
<b>e</b> Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount – see instructions				
<b>f</b> Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				<b>11,246</b>
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)				
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2009				
<b>b</b> Excess from 2010				
<b>c</b> Excess from 2011				
<b>d</b> Excess from 2012				
<b>e</b> Excess from 2013				

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

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

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

**Part XV Supplementary Information (Complete this part only if the foundation 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) )  
**N/A**

**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  
**N/A**

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

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

**a** The name, address, and telephone number or e-mail address of the person to whom applications should be addressed  
**JAMES C. BOHORAD, TRUSTEE 570-622-1811  
P.O. BOX 1280 POTTSVILLE PA 17901-7280**

**b** The form in which applications should be submitted and information and materials they should include  
**SEE STATEMENT 5**

**c** Any submission deadlines  
**NONE**

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors  
**NONE**

**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 <b>SEE STATEMENT 6</b>				<b>10,418</b>
<b>Total</b>			▶ <b>3a</b>	<b>10,418</b>
b Approved for future payment <b>N/A</b>				
<b>Total</b>			▶ <b>3b</b>	





SPAGOLIOTR BEN D. SPAGOLIO CHARITABLE TRUST  
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**Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
LIPKIN, MARSHALL, BOHORAD & THORN	\$ 945	\$	\$	\$
TOTAL	\$ 945	\$ 0	\$ 0	\$ 0

**Statement 2 - Form 990-PF, Part I, Line 18 - Taxes**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
2012 FEDERAL EXCISE TAX	\$ 103	\$	\$	\$
FOREIGN INCOME TAX WITHHELD	8	\$	\$	\$
TOTAL	\$ 111	\$ 0	\$ 0	\$ 0

**Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES				
BANK SERVICE CHARGES	24	\$	\$	\$
OFFICE SUPPLIES - CHECKS	46	\$	\$	\$
TOTAL	\$ 70	\$ 0	\$ 0	\$ 0

**Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
AMERICAN GROWTH & BALANCED FUNDS - C	\$ 84,152	\$ 80,614	COST	\$ 124,201
WADDELL & REED WR ADVISOR FUNDS:				
SCIENCE AND TECHNOLOGY	4,942	5,679	COST	9,457
ACCUMULATIVE	6,055		COST	

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**Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
BOND	\$ 137	137	COST	\$
GOVERNMENT SECURITIES	100	100	COST	
SMALL CAP	6,065	7,406	COST	10,465
ASSET STRATEGY	12,276	13,203	COST	20,961
IVY GLOBAL NATURAL RESOURCES	4,346	4,346	COST	3,865
IVY INTERNATIONAL CORE EQUITY	4,039	4,141	COST	5,494
IVY PACIFIC OPPORTUNITIES	587		COST	
IVY LIMITED-TERM BOND	12,441		COST	
ADVISORS DIVIDEND OPPORTUNITIES	14,283		COST	
ADVISORS HIGH INCOME	37,255	39,356	COST	41,987
ADVISORS CORE INVESTMENT A		32,683	COST	34,516
ADVISORS CONTINENTAL INCOME A		8,607	COST	8,853
TOTAL	\$ 186,678	\$ 196,272		\$ 259,799

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**Statement 5 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**

Description

LETTER FORM, TO INCLUDE THE PURPOSE FOR WHICH THE FUNDS  
WILL BE USED

**Form 990-PF, Part XV, Line 2c - Submission Deadlines**

Description

NONE

**Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**

Description

NONE



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**Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)**

Name	Address	Relationship	Status	Purpose	Amount
DEBRA OF AMERICA	16 E. 41ST ST.			CHARITABLE	200
NEW YORK NY 10017					
DOCTORS WITHOUT BORDERS	HAGERSTOWN			FOR ASSISTANCE WITH HEALTHCARE	
HAGERSTOWN MD 21741	501(C)(3)				
ECO ENERGY FINANCE	2307 15TH ST. NW			CHARITABLE	200
WASHINGTON DC 20009					
EDISON MUSEUM	FORT MEYERS			FOR ASSITANCE WITH EDUCATION	
FORT MEYERS FL	501(C)(3)				
FATHER WALTER CISZEK PRAYER LEAGUE	231 JARDIN ST.			FOR ASSISTANCE WITH RELIGION	50
SHENANDOAH PA 17976					
FIRST CANDLE	2105 LAUREL BUSH RD.			CHARITABLE	150
BEL AIR MD 21015					
FIRST UNITED CHURCH OF CHRIST	110 S. ROUTE 61 SOUTH			FOR ASSISTANCE WITH RELIGION	100
SCHUYLKILL HAVEN PA 17972	CHURCH				
FRANKLIN & MARSHALL COLLEGE	LANCASTER			FOR ASSISTANCE WITH EDUCATION	100
LANCASTER PA					
GIRL SCOUTS OF THE NATION'S CAPITAL	816 CONNECTICUT AVE. N.W.			PUBLIC CHARITY	50
WASHINGTON DC 20006	501(C)(3)				
GOLISAMO CHILDREN'S MUSEUM	15080 LIVINGSTON RD.			FOR ASSISTANCE WITH EDUCATION	125
NAPLES FL 34109	501(C)(3)				
GULFSHORE PLAYHOUSE	755 8TH AVE. SOUTH			FOR ASSISTANCE WITH THE ARTS	100
NAPLES FL 34108					
HABITAT FOR HUMANITY	PO BOX 1729			FOR ASSISTANCE TO UNDER-PRIVILEGED	
AMERICUS GA 31709	501(C)(3)				
HAWK MOUNTAIN SANCTUARY	1700 HAWK MOUNTAIN ROAD			FOR ASSISTANCE WITH WILDLIFE PRESERV	
KEMPTON PA 19529	501(C)(3)				
HILLSIDE SPCA	P.O. BOX 233			FOR ASSISTANCE TO ANIMALS	
POTTSVILLE PA 17901	501(C)(3)				
HODGES UNIVERSITY	2655 NORTHBROOKE DR.			FOR ASSISTANCE WITH EDUCATION	
NAPLES FL 34119	SCHOOL				
HOLOCAUST MUSEUM OF SW FLORIDA	4760 TAMiami TR N			FOR ASSISTANCE WITH EDUCATION	70
NAPLES FL 34103	501(C)(3)				
HOLY CROSS CHURCH	99 VALLEY ST.			FOR ASSISTANCE WITH RELIGION	
NEW PHILADELPHIA PA 17951	CHURCH				

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**Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
Address		Relationship	Address	Status			
HOPE HOSPICE C/O HOPE HEALTH HYANNIS MA 02610	N/A	765 ATTUCKS LN			CHARITABLE	50	
HOSPICE OF CENTRAL PENNSYLVANIA HARRISBURG PA 17110	N/A	1320 LINGLESTOWN RD. 501(C) (3)			PUBLIC CHARITY		
INTERNATIONAL PLANNED PARENTHOOD NEW YORK NY 10269	N/A	120 WALL STREET 501(C) (3)			FOR ASSISTANCE WITH EDUCATION		
JAMES & MARY EDITH RHOADS FOUND. POTTSVILLE PA 17901	N/A	P.O. BOX 485 501(C) (3)			PUBLIC CHARITY		
JUVENILE DIABETES RESEARCH FOUND. NEW YORK NY 10004	N/A	26 BROADWAY 501(C) (3)			FOR ASSISTANCE WITH DIABETES RESEARC	100	
KILMER MIDDLE SCHOOL DISTRICT VIENNA VA 22182	N/A	8100 WOLFTRAP RD. SCHOOL			FOR ASSISTANCE WITH EDUCATION		
LEAGUE OF WOMEN VOTERS ED FUND WASHINGTON DC 20036	N/A	1730 NORTH ST. NW 501(C) (3)			FOR ASSISTANCE WITH EDUCATION		
LEUKEMIA AND LYMPHOMA SOC PITTSFIELD MA 01202	N/A	PO BOX 4072 501(C) (3)			FOR ASSISTANCE WITH LEUKEMIA RESEARC		
MAHANOY AREA HISTORICAL SOCIETY MAHANOY CITY PA 17948	N/A	P.O. BOX 127			FOR ASSISTANCE WITH EDUCATION	150	
MUSCULAR DYSTROPHY ASSOC. ALLEN TOWN PA 18106	N/A	5940 HAMILTON BLVD. 501(C) (3)			FOR ASSISTANCE WITH RESEARCH		
NAPLES COUNCIL ON WORLD AFFAIRS FORT MYERS FL 33913	N/A	12290 TREELINE AVE. 501(C) (3)			FOR ASSISTANCE WITH EDUCATION	175	
NAPLES MUSEUM OF ART NAPLES FL 34108	N/A	5833 PELICAN BAY BLVD. 501(C) (3)			FOR ASSISTANCE TO THE ARTS	150	
NATIONAL AQUARIUM OF BALTIMORE BALTIMORE MD 21202	N/A	501 E. PRATT ST.			FOR ASSISTANCE WITH EDUCATION	175	
NATIONAL WHEELCHAIR BASKETBALL ASSO COLORADO SPRINGS CO 80907	N/A	1130 ELKTON STREET 501(C) (3)			FOR ASSISTANCE TO HANDICAPPED	75	
NATIVITY BVM HIGH SCHOOL POTTSVILLE PA 17901	N/A	LAWTON HILL SCHOOL			FOR ASSISTANCE WITH EDUCATION	200	
OHEB ZEDECK SISTERHOOD POTTSVILLE PA 17901	N/A	2400 WEST END AVE. CHURCH			FOR ASSISTANCE WITH RELIGION		
OHEB ZEDECK SYNAGOGUE CENTER POTTSVILLE PA 17901	N/A	2400 WEST END AVE. CHURCH			FOR ASSISTANCE WITH RELIGION	390	

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**Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
Name	Address	Relationship	Status	Purpose	Amount		
ORWIGSBURG BOROUGH							
ORWIGSBURG PA 17961		NORTH WARREN ST.	501(C) (3)	FOR ASSISTANCE WITH AMBULANCE SERVIC	70		
ORWIGSBURG FREE PUBLIC LIBRARY		214 INDEPENDENCE ST.	501(C) (3)	FOR ASSISTANCE WITH EDUCATION/BOOKS	100		
ORWIGSBURG PA 17961		1048 GOODLETTE RD.	501(C) (3)	FOR ASSISTANCE WITH PARKINSON RESEAR			
PARKINSON ASSOC. OF S.W. FLORIDA		400 NORTH STREET	501(C) (3)	FOR ASSISTANCE WITH EDUCATION	50		
NAPLES FL 34102		UNIVERSITY PARK		FOR ASSISTANCE WITH EDUCATION	100		
PENNSYLVANIA HERITAGE FOUNDATION		2000 M ST NW	501(C) (3)	FOR ASSISTANCE WITH EDUCATION			
HARRISBURG PA 17120		5833 PELICAN BAY BLVD.	501(C) (3)	FOR ASSISTANCE WITH ARTS	595		
PENNSYLVANIA STATE UNIVERSITY		NAPLES FL 34108	501(C) (3)	FOR ASSISTANCE WITH EDUCATION			
UNIVERSITY PARK PA		PLANNED PARENTHOOD FEDERATION OF AM		FOR ASSISTANCE WITH EDUCATION			
PEOPLE FOR THE AMERICAN WAY FOUND		WASHINGTON DC 20077	N/A	CHARITABLE	50		
WASHINGTON DC 20077		320 N. 9TH ST.	501(C) (3)	FOR ASSISTANCE WITH RELIGION			
PHILHARMONIC CTR FOR ARTS		2400 WEST END AVENUE	501(C) (3)	CHARITABLE	50		
NAPLES FL 34108		POTTSVILLE		FOR ASSISTANCE WITH EDUCATION/BOOKS	450		
PLANNED PARENTHOOD FEDERATION OF AM		215 W. MARKET ST.	501(C) (3)	PUBLIC CHARITY	50		
WASHINGTON DC 20077		POTTSVILLE		FOR ASSISTANCE WITH YOUTH SPORTS			
POTTSVILLE AREA EMS		436 ADAMS STREET		FOR ASSISTANCE WITH EDUCATION			
POTTSVILLE PA 17901		NAPLES		FOR ASSISTANCE WITH EDUCATION	380		
POTTSVILLE CHAPTER OF HADASSAH		PRINCETON		FOR ASSISTANCE WITH EDUCATION			
POTTSVILLE PA 17901		500 MUSEUM ROAD	501(C) (3)	FOR ASSISTANCE WITH EDUCATION			
POTTSVILLE CRIMSON TIDE WRESTLING		READING PA 19611					
POTTSVILLE PA 17901							
POTTSVILLE PUBLIC LIBRARY							
POTTSVILLE PA 17901							
POTTSVILLE ROTARY CHARITIES							
POTTSVILLE PA 17901							
POTTSVILLE TEENER BASEBALL LEAGUE							
POTTSVILLE PA 17901							
PRINCETON CLUB OF SW FLORIDA							
NAPLES FL							
PRINCETON UNIVERSITY							
PRINCETON NJ							
READING PUBLIC MUSEUM							
READING PA 19611							

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**Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)**

Name	Address	Relationship	Status	Purpose	Amount
RENAISSANCE ACAD OF FL FORT MYERS FL 33919	8695 COLLEGE PARKWAY SCHOOL	N/A		FOR ASSISTANCE WITH EDUCATION	293
SCHUYLKILL COUNTY COUNCIL FOR ARTS POTTSVILLE PA 17901	1440 MAHANTONGO STREET 501(C)(3)	N/A		FOR ASSISTANCE WITH ARTS	680
SCHUYLKILL COUNTY YMCA POTTSVILLE PA 17901	219 N. 12TH ST. 501(C)(3)	N/A		TO PROMOTE CHRISTIAN PRINCIPLES	700
SCHUYLKILL HEALTH CARE POTTSVILLE PA 17901	SOUTH JACKSON ST. 501(C)(3)	N/A		PUBLIC CHARITY	580
SCHUYLKILL HEALTHCARE AUXILIARY POTTSVILLE PA 17901	POTTSVILLE 501(C)(3)	N/A		FOR ASSISTANCE WITH HEALTHCARE	150
SCHUYLKILL INTERMEDIATE UNIT 29 MARLIN PA 17951	17 MAPLE AVE. SCHOOL	N/A		FOR ASSISTANCE WITH EDUCATION	100
SCHUYLKILL MEDICAL CENTER POTTSVILLE PA 17901	SOUTH JACKSON ST. HOSPITAL	N/A		FOR ASSISTANCE WITH HEALTH CARE	
SCHUYLKILL WOM. IN CRISIS POTTSVILLE PA 17901	368 S. CENTER ST. 501(C)(3)	N/A		FOR ASSISTANCE TO WOMEN	75
SEXUAL ASSAULT RESOURCE COUNS CTR LEBANON PA	LEBANON 501(C)(3)	N/A		FOR ASSISTANCE TO VICTIMS	200
SHELTER FOR ABUSED WOMEN & CHILDREN NAPLES FL 34112	LAKEWOOD BOULEVARD 501(C)(3)	N/A		FOR ASSISTANCE TO VICTIMS	
SJOGREN'S SYNDROME FOUNDATION BETHESDA MD 20817	6707 DEMOCRACY BOULEVARD 501(C)(3)	N/A		FOR ASSISTANCE WITH EDUCATION	
SOL LIPTON SCHOLARSHIP FOUNDATION POTTSVILLE PA 17901	316 N. CENTRE ST. 501(C)(3)	N/A		FOR ASSISTANCE WITH EDUCATION	165
SOUTHERN POVERTY LAW CENTER MONTGOMERY AL 36104	400 WASHINGTON AVE. NORTH CENTRE STREET	N/A		FOR ASSISTANCE WITH EDUCATION	100
SOVEREIGN MAJESTIC THEATRE POTTSVILLE PA 17901	4000 DEKALB PARKWAY 501(C)(3)	N/A		FOR ASSISTANCE WITH ARTS	60
SPECIAL OLYMPICS GEORGIA ATLANTA GA 30340	10TH & MAHANTONGO STREETS CHURCH	N/A		FOR ASSISTANCE TO HANDICAPPED	
ST. JOHN THE BAPTIST CHURCH POTTSVILLE PA 17901	236 MARKET STREET CHURCH	N/A		FOR ASSISTANCE WITH RELIGION	60
ST. JOHN'S UCC CHURCH ORWIGSBURG PA 17961	CHURCH	N/A		FOR ASSISTANCE WITH RELIGION	

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**Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
Address							
ST. KATHERINE'S CHURCH NAPLES FL 34108		NAPLES	CHURCH	N/A		FOR ASSISTANCE WITH RELIGION	200
ST. PATRICK'S CHURCH POTTSVILLE PA 17901		319 MAHANTONGO ST. CHURCH		N/A		FOR ASSISTANCE WITH RELIGION	
ST. RICHARD'S CHURCH BARNESVILLE PA		BARNESVILLE CHURCH		N/A		FOR ASSISTANCE WITH RELIGION	
SUSAN G. KORMAN FOR CURE DALLAS TX 75244		5005 LBJ FREEWAY 501 (C) (3)		N/A		ASSISTANCE WITH MEDICAL RESEARCH	
THE HILL SCHOOL POTTSTOWN PA		POTTSTOWN SCHOOL		N/A		FOR ASSISTANCE WITH EDUCATION	
THE MAIN IDEA AT CAMP WALDEN DENMARK ME		DENMARK 501 (C) (3)		N/A		FOR ASSISTANCE WITH EDUCATION	
THE TAUSSIG CANCER INS AT CLEVELAND CLEVELAND OH 44195		9500 EUCLID 501 (C) (3)		N/A		FOR ASSISTANCE WITH EDUCATION	
TRUSTEES OF PHILLIPS ACADEMY ANDOVER MA 01810		180 MAIN STREET SCHOOL		N/A		FOR ASSISTANCE WITH EDUCATION	135
TRUSTEES OF UNIV OF PENNSYLVANIA PHILADELPHIA PA 19194		3910 CHESTNUT STREET SCHOOL		N/A		FOR ASSISTANCE WITH EDUCATION	
TRYALL FUND NEW YORK NY 10022		641 LEXINGTON AVE. 501 (C) (3)		N/A		FOR ASSISTANCE IN EDUCATION	200
UNIVERSITY OF PENNSYLVANIA PHILADELPHIA PA 19104		PHILADELPHIA SCHOOL		N/A		FOR ASSISTANCE WITH EDUCATION	230
UPPER SCHUYLKILL HIGH SCHOOL HAZLE TWP PA 18202		4210 HOLLYWOOD BOULEVARD SCHOOL		N/A		FOR ASSISTANCE WITH EDUCATION	
WALK IN ART CENTER SCHUYLKILL HAVEN PA 17972		100 S. COLUMBIA AVE. 501 (C) (3)		N/A		FOR ASSISTANCE WITH ARTS	50
WOMEN IN SPORTS NEW YORK NY 10001		244 5TH AVE. 501(C) (3)		N/A		PUBLIC CHARITY	
WGCU PUBLIC TELEVISION FT. MYERS FL 33965		10501 FGCU BLVD. SOUTH N/A		N/A		FOR ASSISTANCE WITH EDUCATION	100
WVIA TV PUBLIC BROADCASTING PITTSBON PA 18640		100 WVIA WAY N/A		N/A		FOR ASSISTANCE WITH EDUCATION	100

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Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the  
Year (continued)

Name	Address	Relationship	Status	Purpose	Amount
TOTAL					10,418

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**Taxable Dividends from Securities**

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business Code</u>	<u>Exclusion Code</u>	<u>Postal Code</u>	<u>US Obs (\$ or %)</u>
WADDELL & REED	\$ 4,606			PA	
AMERICAN FUNDS	1,668			PA	
VANGUARD				PA	
TOTAL	\$ <u>6,274</u>				