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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

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Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://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 GERTRUDE JOSEPHINE BENNETT FAMILY FOUNDATION		A Employer identification number  20-5716045	
Number and street (or P O box number if mail is not delivered to street address) 660 US HWY ONE - 3RD FLOOR		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code N PALM BEACH, FL 33408		B Telephone number (see instructions)  (561) 627-8100	
G Check all that apply <div><input type="checkbox"/> Initial return</div> <div><input type="checkbox"/> Initial return of a former public charity</div> <div><input type="checkbox"/> Final return</div> <div><input type="checkbox"/> Amended return</div> <div><input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Name change</div>		C If exemption application is pending, check here <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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <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"/> \$ 8,524,855		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
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 <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities. . . . .	166,548	166,548	166,548	
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	248,851			
	b Gross sales price for all assets on line 6a 2,401,432				
	7 Capital gain net income (from Part IV, line 2) . . .		248,868		
	8 Net short-term capital gain . . . . .			13,453	
	9 Income modifications . . . . .				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold . . . . .				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .				
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	415,399	415,416	180,001	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .	 10,601	10,601		
	b Accounting fees (attach schedule) . . . . .				
	c Other professional fees (attach schedule) . . . . .				
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions)	 15,006	15,006		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .	 58,595	58,595		
	24 <b>Total operating and administrative expenses.</b>				
	Add lines 13 through 23 . . . . .	84,202	84,202		0
	25 Contributions, gifts, grants paid . . . . .	515,000			515,000
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	599,202	84,202		515,000
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-183,803			
	b <b>Net investment income</b> (if negative, enter -0-)		331,214		
	c <b>Adjusted net income</b> (if negative, enter -0-)			180,001	

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 . . . . .	3,087,720	2,843,797	2,843,796
	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) . . . . .	4,749,828	4,809,948	5,681,059
	c	Investments—corporate bonds (attach schedule). . . . .			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)			
	16	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	7,837,548	7,653,745	8,524,855
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	
Net Assets or Fund Balances		<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24	Unrestricted . . . . .			
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
		<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 27 through 31.</b>			
	27	Capital stock, trust principal, or current funds . . . . .	7,187,293	7,187,293	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	650,255	466,452	
	30	<b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	7,837,548	7,653,745	
	31	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	7,837,548	7,653,745	

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	7,837,548
2	Enter amount from Part I, line 27a . . . . .	2	-183,803
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3 . . . . .	4	7,653,745
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	7,653,745

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	See Additional Data Table			
b				
c				
d				
e				

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	248,868
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	13,453

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			
2011			
2010			
2009			
2008			

2	Total of line 1, column (d). . . . .	2	
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	
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5. . . . .	4	
5	Multiply line 4 by line 3. . . . .	5	
6	Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	
7	Add lines 5 and 6. . . . .	7	
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	

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)					
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	6,624		
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 . . . . .		2			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)					
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)				2	
3 Add lines 1 and 2. . . . .				3	6,624
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	6,624		
6 Credits/Payments		7	12,000		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a			12,000	
b Exempt foreign organizations—tax withheld at source . . . . .	6b				
c Tax paid with application for extension of time to file (Form 8868)	6c				
d Backup withholding erroneously withheld . . . . .	6d				
7 Total credits and payments. Add lines 6a through 6d. . . . .		7	12,000		
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	66		
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	5,310		
11 Enter the amount of line 10 to be Credited to 2014 estimated tax  5,310 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? . . . . .		Yes	No
		1a		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>			No
		1b		No
c	Did the foundation file Form 1120-POL for this year?. . . . .	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation  \$ _____ (2) On foundation managers  \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers  \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <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		No
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) FL _____			
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? Website address (none)	13	Yes	
14	The books are in care of GERALD L PRINCIPE Telephone no (561) 627-8100 Located at 660 US HWY ONE - 3RD FL N PALM BEACH FL ZIP +4 33408			
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 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

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. Yes No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ). Yes 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.	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?.	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?. If "Yes," list the years 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions ).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. Yes 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.).	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

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

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes

No

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

Yes

No

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

Yes

No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1 ), (2), or (3), or section 4940(d)(2)? (see instructions).

Yes

No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes

No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

No

Organizations relying on a current notice regarding disaster assistance check here.

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes

No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes

No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

No

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
See Additional Data Table				

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 UNSOLICITED CONTRIBUTIONS TO PUBLIC CHARITIES- SEE PART XV OF THIS RETURN	515,000
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

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



Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities. . . . .	1a	4,863,857
b	Average of monthly cash balances. . . . .	1b	3,769,692
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	8,633,549
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	0
2	Acquisition indebtedness applicable to line 1 assets. . . . .	2	
3	Subtract line 2 from line 1d. . . . .	3	8,633,549
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	129,503
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	8,504,046
6	Minimum investment return. Enter 5% of line 5. . . . .	6	425,202

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	425,202
2a	Tax on investment income for 2013 from Part VI, line 5. . . . .	2a	6,624
b	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	6,624
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	418,578
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	
5	Add lines 3 and 4. . . . .	5	418,578
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	418,578

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	515,000
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	515,000
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	515,000
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				418,578
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. . . . .				24,325
e From 2012. . . . .				99,406
f Total of lines 3a through e. . . . .	123,731			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 515,000				
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). . . . .	0			
d Applied to 2013 distributable amount. . . . .				418,578
e Remaining amount distributed out of corpus	96,422			
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	220,153			
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 . . . . .	220,153			
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				24,325
d Excess from 2012. . . .				99,406
e Excess from 2013. . . .				96,422

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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
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

Form 990-PF (2013)

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total . . . . .			3a	515,000
b Approved for future payment				
Total . . . . .			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)



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

<b>(a)</b> 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>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo , day, yr )	<b>(d)</b> Date sold (mo , day, yr )
265 SHS NATIONSTAR MTG HLDGS INC	P	2013-01-01	2013-12-23
SCHWAB #1811 LONG-TERM SALES - PUB TRADED	P	2012-01-01	2013-12-31
SCHWAB #1811 LONG-TERM SALES - PUB TRADED	P	2012-01-01	2013-12-31
SCHWAB #9003 SHORT-TERM SALES - PUB TRADED	P	2013-01-01	2013-12-31
SCHWAB #9003 LONG-TERM SALES - PUB TRADED	P	2012-01-01	2013-12-31
FIDELITY #1006 SHORT-TERM SALES - PUB TRADED	P	2013-01-01	2013-12-31
FIDELITY #1006 LONG-TERM SALES - PUB TRADED	P	2012-01-01	2013-12-31
FIDELITY #1006 LONG-TERM SALES - PUB TRADED	P	2012-01-01	2013-12-31
1,000 SHS JOY GLOBAL INC	P	2013-01-01	2013-01-04
1,000 SHS KORN/FERRY INTERNATIONAL	P	2012-03-30	2013-01-04
2,000 SHS AIA GROUP LTD	P	2012-04-25	2013-09-27
1,000 SHS NESTLE	P	2012-05-07	2013-09-27
2,000 SHS STAPLES INC	P	2012-02-29	2013-09-27

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
9,655		8,848	807
86,455		69,880	16,575
100,558		66,086	34,472
122,055		114,098	7,957
89,972		100,615	-10,643
297,480		292,356	5,124
476,038		468,633	7,405
999,396		831,637	167,759
66,062		65,790	272
16,153		16,860	-707
38,492		28,400	10,092
69,942		60,100	9,842
29,174		29,278	-104




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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			807
			16,575
			34,472
			7,957
			-10,643
			5,124
			7,405
			167,759
			272
			-707
			10,092
			9,842
			-104


Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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
GERALD PRINCIPE	Secretary 1 00	0		
660 US HWY ONE - 3RD FL N PALM BEACH,FL 33408				
DAVID HENRY FRANKEL	Director 1 00	0		
444 12TH ST APT 4-A BROOKLYN,NY 11215				
JOEL I BENNETT	President 10 00	0		
4246 BEULAH DRIVE LA CANADA,CA 91011				
WENDY M BENNETT	Vice President 1 00	0		
4246 BEULAH DRIVE LA CANADA,CA 91011				
PAMELA H BENNETT	Vice President 1 00	0		
910 5TH AVE APT 7B NEW YORK,NY 10021				


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)				
<b>a</b> <i>Paid during the year</i>				
PARA LOS NINOS 500 LUCAS AVE LOS ANGELES,CA 90017	N/A	PUBLIC	GENERAL FUND	1,000
WOMEN FOR WOMEN INTERNATIONAL GLOBA PO BOX 9224 CENTRAL ISLIP,NY 11722	N/A	PUBLIC	GENERAL FUND	2,500
FOODBANK OF SOUTHERN CALIFORNIA 1444 SAN FRANCISCO AVE LONG BEACH,CA 90813	N/A	PUBLIC	GENERAL FUND	15,000
LA TIMES HOLIDAY CAMPAIGN FILE 556986 LOS ANGELES,CA 90074	N/A	PUBLIC	GENERAL FUND	1,000
SAVE THE CHILDREN 54 WILTON ROAD WESTPORT,CT 06880	N/A	PUBLIC	GENERAL FUND	15,000
MAZON 1990 SOUTH BUNDY DRIVE SUITE 260 LOS ANGELES,CA 90025	N/A	PUBLIC	GENERAL FUND	10,000
PS ARTS 11965 VENICE BLVD 201 LOS ANGELES,CA 90066	N/A	PUBLIC	GENERAL FUND	1,000
LIFE IN A JAR FOUNDATION 610 MEADOW LANE FORT SCOTT,KS 66701	N/A	PUBLIC	GENERAL FUND	1,000
LA CANADA FLINTRIDGE EDUCATIONAL FO PO BOX 869 LA CANADA,CA 91012	N/A	PUBLIC	GENERAL FUND	25,000
UNIVERSITY OF MICHIGAN 8000 WOLVERINE TOWER ANN ARBOR,MI 48109	N/A	PUBLIC	GENERAL FUND	50,000
COLUMBIA UNIVERSITY 475 RIVERSIDE DRIVE NEWYORK,NY 10115	N/A	PUBLIC	GENERAL FUND	25,000
NATIONAL MS SOCIETY 2440 S SEPULVEDA BLVD SUITE 115 LOS ANGELES,CA 90064	N/A	PUBLIC	GENERAL FUND	25,000
PEF ISRAEL ENDOWMENT FUND 317 MADISON AVE SUITE 607 NEWYORK,NY 10017	N/A	PUBLIC	GENERAL FUND	5,000
LIFELINK FOUNDATION 409 BAYSHORE BLVD TAMPA,FL 33606	N/A	PUBLIC	GENERAL FUND	5,000
ACCESS BOOKS PO BOX 64951 LOS ANGELES,CA 90064	N/A	PUBLIC	GENERAL FUND	1,000
<b>Total . . . . .</b>  <b>3a</b>				515,000


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)				
<b>a</b> Paid during the year				
BARUCH COLLEGE 55 LEXINGTON AVE NEW YORK, NY 10010	N/A	PUBLIC	GENERAL FUND	5,000
BET TZEDEK 12821 VICTORY BLVD NORTH HOLLYWOOD, CA 91606	N/A	PUBLIC	GENERAL FUND	5,000
BUILD A SCHOOL IN AFRICA 83 GROTON STREET PEPPERELL, MA 01463	N/A	PUBLIC	GENERAL FUND	5,000
CENTER FOR AMERICAN PROGRESS 1333 H STREET NW 10TH FLOOR WASHINGTON, DC 20005	N/A	PUBLIC	GENERAL FUND	2,500
CITY OF HOPE 1500 EAST DUARTE ROAD DUARTE, CA 91010	N/A	PUBLIC	GENERAL FUND	5,000
CITYMEALS ON WHEELS 355 LEXINGTON AVE 3 NEW YORK, NY 10017	N/A	PUBLIC	GENERAL FUND	5,000
COMMON CAUSE EDUCATION FUND 1133 19TH STREET NW 9TH FLOOR WASHINGTON, DC 20036	N/A	PUBLIC	GENERAL FUND	2,500
HADASSAH 50 WEST 58TH STREET NEW YORK, NY 10019	N/A	PUBLIC	GENERAL FUND	10,000
HEIFER INTERNATIONAL 1 WORLD AVENUE LITTLE ROCK, AR 72202	N/A	PUBLIC	GENERAL FUND	5,000
JEWISH COMMUNITY CENTER IN MANHATTA 334 AMSTERDAM AVE NEW YORK, NY 10023	N/A	PUBLIC	GENERAL FUND	5,000
KCET 4401 SUNSET BLVD LOS ANGELES, CA 90027	N/A	PUBLIC	GENERAL FUND	1,000
MARCH OF DIMES 1275 MAMARONECK AVENUE WHITE PLAINS, NY 10605	N/A	PUBLIC	GENERAL FUND	1,000
MENDING KIDS INTERNATIONAL 4100 WALAMEDA AVENUE SUITE 103 BURBANK, CA 91505	N/A	PUBLIC	GENERAL FUND	5,000
METROPOLITAN MUSEUM OF ART 1000 5TH AVENUE NEW YORK, NY 10028	N/A	PUBLIC	GENERAL FUND	5,000
NATURAL RESOURCES DEFENSE COUNCIL 40 WEST 20TH STREET NEW YORK, NY 10011	N/A	PUBLIC	GENERAL FUND	5,000
<b>Total . . . . .</b>  <b>3a</b>				515,000

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)				
<b>a</b> Paid during the year				
NEW YORK GLAUCOMA RESEARCH INSTITUT 310 E 14TH STREET NEW YORK,NY 10003	N/A	PUBLIC	GENERAL FUND	10,000
ORT AMERICA 75 MAIDEN LANE 10TH FLOOR NEW YORK,NY 10038	N/A	PUBLIC	GENERAL FUND	10,000
SISTER SCHOOLS PO BOX 99492 SEATTLE,WA 98139	N/A	PUBLIC	GENERAL FUND	1,000
UNION STATION HOMELESS SERVICES 825 EAST ORANGE GROVE BLVD PASADENA,CA 91104	N/A	PUBLIC	GENERAL FUND	2,500
VISTA DEL MAR 3200 MOTOR AVENUE LOS ANGELES,CA 90034	N/A	PUBLIC	GENERAL FUND	5,000
AMERICAN JEWISH WORLD SERVICE 45 WEST 36TH STREET NEW YORK,NY 10018	N/A	PUBLIC	GENERAL FUND	2,500
CARNEGIE MELLON UNIVERSITY 5000 FORBES AVENUE PITTSBURGH,PA 15213	N/A	PUBLIC	GENERAL FUND	25,000
CENTRAL PARK CONSERVANCY 14 E 60TH STREET NEW YORK,NY 10022	N/A	PUBLIC	GENERAL FUND	7,500
CHARITY WATER 200 VARICK STREET SUITE 201 NEW YORK,NY 10014	N/A	PUBLIC	GENERAL FUND	15,000
FOOTHILL UNITY CENTER 415 W CHESTNUT AVENUE MONROVIA,CA 91016	N/A	PUBLIC	GENERAL FUND	5,000
JEWISH FAMILY SERVICE OF LA - SOVA 16439 VANOWEN STREET VAN NUYS,CA 91406	N/A	PUBLIC	GENERAL FUND	5,000
UNIVERSITY OF SOUTHERN CALIFORNIA UNIVERSITY PARK CAMPUS LOS ANGELES,CA 90089	N/A	PUBLIC	GENERAL FUND	50,000
HAVEN HILLS 6918 OWENSMOUTH AVENUE CANOGA PARK,CA 91303	N/A	PUBLIC	GENERAL FUND	2,500
GLENDALE ADVENTIST HEALTHCARE FOUND 1509 WILSON TERRACE GLENDALE,CA 91206	N/A	PUBLIC	GENERAL FUND	10,000
AMERICAN JEWISH JOINT DISTRIBUTION 711 3RD AVENUE 900 NEW YORK,NY 10017	N/A	PUBLIC	GENERAL FUND	20,000
<b>Total . . . . .</b>  <b>3a</b>				515,000

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)				
<b>a</b> <i>Paid during the year</i>				
CALIFORNIA COMMUNITY FOUNDATION 221 S FIGUEROA STREET SUITE 400 LOS ANGELES,CA 90012	N/A	PUBLIC	GENERAL FUND	10,000
GLOBAL FUND FOR CHILDREN 11101 FOURTEENTH ST NW SUITE 420 WASHINGTON,DC 20005	N/A	PUBLIC	GENERAL FUND	2,500
JEWISH VOCATIONAL SERVICE OF LOS AN 6505 WILSHIRE BOULEVARD LOS ANGELES,CA 90048	N/A	PUBLIC	GENERAL FUND	5,000
UNITED NATIONS FOUNDATION 1800 MASSACHUSETTS AVE NW STE 400 WASHINGTON,DC 20036	N/A	PUBLIC	GENERAL FUND	2,000
ROOM TO READ 111 SUTTER STREET 16TH FLOOR SAN FRANCISCO,CA 94104	N/A	PUBLIC	GENERAL FUND	5,000
THE HUNGER PROJECT 5 UNION SQUARE WEST 7TH FL NEWYORK,NY 10003	N/A	PUBLIC	GENERAL FUND	5,000
UNIVERSITY OF CALIFORNIA SANTA BARB 552 UNIVERSITY ROAD SANTA BARBARA,CA 93106	N/A	PUBLIC	GENERAL FUND	5,000
VITAL VOICES GLOBAL PARTNERSHIP 1625 MASSACHUSETTS AVE NW WASHINGTON,DC 20036	N/A	PUBLIC	GENERAL FUND	5,000
AMERICAN RED CROSS 11355 OHIO AVENUE LOS ANGELES,CA 90025	N/A	PUBLIC	GENERAL FUND	10,000
FOOD BANK OF MONMOUTH OCEAN COUNTIE 3300 NEW JERSEY 66 NEPTUNE TOWNSHIP,NJ 07753	N/A	PUBLIC	GENERAL FUND	10,000
JEWISH FAMILY SERVICES GRAMERCY PLA 3580 WILSHIRE BLVD 7TH FLOOR LOS ANGELES,CA 90010	N/A	PUBLIC	GENERAL FUND	5,000
FEEDING AMERICA 35 EAST WACKER DRIVE SUITE 2000 CHICAGO,IL 60601	N/A	PUBLIC	GENERAL FUND	25,000
HOMEBOY INDUSTRIES 130 W BRUNO STREET LOS ANGELES,CA 90012	N/A	PUBLIC	GENERAL FUND	5,000
<b>Total . . . . .</b>  <b>3a</b>				515,000

**TY 2013 Investments Corporate  
Stock Schedule**

**Name:** GERTRUDE JOSEPHINE BENNETT  
FAMILY FOUNDATION

**EIN:** 20-5716045

**Software ID:** 13000170

**Software Version:** 2013v3.1

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
SCHWAB #1-EQUITY INVESTMENTS	631,146	859,899
FIDELITY-EQUITY INVESTMENTS	3,816,903	4,419,692
SCHWAB #2-EQUITY INVESTMENTS	141,014	126,028
TD AMERITRADE-EQUITY INVESTMENTS	220,885	275,440

**TY 2013 Legal Fees Schedule**

**Name:** GERTRUDE JOSEPHINE BENNETT  
FAMILY FOUNDATION

**EIN:** 20-5716045

**Software ID:** 13000170

**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	10,601	10,601	0	0



**TY 2013 Other Expenses Schedule**

**Name:** GERTRUDE JOSEPHINE BENNETT  
FAMILY FOUNDATION

**EIN:** 20-5716045

**Software ID:** 13000170

**Software Version:** 2013v3.1

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADMINISTRATIVE EXPENSES	3,394	3,394		
INVEST MANAGEMENT FEES	12,368	12,368		
INVEST SUBSCRIPTIONS, SOFTWARE, & MISC	41,872	41,872		
MISCELLANEOUS EXPENSES	961	961		

**TY 2013 Taxes Schedule**

**Name:** GERTRUDE JOSEPHINE BENNETT  
FAMILY FOUNDATION

**EIN:** 20-5716045

**Software ID:** 13000170

**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	11,955	11,955		
FOREIGN TAXES	3,051	3,051		