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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.

OMB No 1545-0052

2013

Open to Public Inspection

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

Name of foundation THE WILLIAM G POMEROY FOUNDATION		A Employer identification number 20-6572301	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 3327		B Telephone number (see instructions) (315) 476-3000	
City or town, state or province, country, and ZIP or foreign postal code SYRACUSE, NY 132203327		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 26,122,222		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	3,975,038			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	34,714	34,714		
	4 Dividends and interest from securities.	254,380	254,380		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	249,663			
	b Gross sales price for all assets on line 6a 763,959				
	7 Capital gain net income (from Part IV, line 2) . . .		249,663		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	 -8,824	-8,824		
	12 Total. Add lines 1 through 11	4,504,971	529,933		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	 5,240	3,930		1,310
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	 6,080	1,072		750
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings	2,659	0		2,659
	22 Printing and publications				
	23 Other expenses (attach schedule)	 3,050	368		2,682
	24 Total operating and administrative expenses. Add lines 13 through 23	17,029	5,370		7,401
	25 Contributions, gifts, grants paid	868,597			868,597
	26 Total expenses and disbursements. Add lines 24 and 25	885,626	5,370		875,998
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	3,619,345			
	b Net investment income (if negative, enter -0-)		524,563		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	10,669,354	7,484,256	7,484,256
	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)	1,017,035 	837,935	837,935
	b	Investments—corporate stock (attach schedule)	8,494,241 	17,799,392	17,799,392
	c	Investments—corporate bonds (attach schedule).	454,996		
	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) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)	 2,299	 639	 639
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	20,637,925	26,122,222	26,122,222
	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 ▶ _____)			
Net Assets or Fund Balances	23	Total liabilities (add lines 17 through 22)	0	0	
		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	20,637,925	26,122,222	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	20,637,925	26,122,222	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	20,637,925	26,122,222	

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	20,637,925
2	Enter amount from Part I, line 27a	2	3,619,345
3	Other increases not included in line 2 (itemize) ▶ _____ 	3	1,864,959
4	Add lines 1, 2, and 3	4	26,122,229
5	Decreases not included in line 2 (itemize) ▶ _____ 	5	7
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	26,122,222

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	FIDELITY INVESTMENTS - 2784			
b	FIDELITY INVESTMENTS - 2784 (CAPITAL GAIN DISTRIBUTION)			
c	ENTERPRISE PRODUCTS PARTNERS L P - K-1			
d	UNITED STATE NATURAL GAS FUND LP			
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 515,169		513,881	1,288
b 248,739			248,739
c 51			51
d		415	-415
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			1,288
b			248,739
c			51
d			-415
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	249,663
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	736,066	17,619,126	0 041777
2011	605,136	14,785,912	0 040927
2010	458,786	12,225,097	0 037528
2009	346,224	9,326,026	0 037124
2008	221,553	6,851,364	0 032337

2 Total of line 1, column (d).	2	0 189693
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 037939
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	21,457,501
5 Multiply line 4 by line 3.	5	814,076
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	5,246
7 Add lines 5 and 6.	7	819,322
8 Enter qualifying distributions from Part XII, line 4.	8	875,998

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

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

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		1	5,246
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)					
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b			
c		All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0
3		Add lines 1 and 2.		3	5,246
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	5,246
6		Credits/Payments			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	4,000		
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	4,000
8		Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	1,246
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	
11		Enter the amount of line 10 to be Credited to 2014 estimated tax ☒ Refunded ☐		11	

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☒ \$ 0 (2) On foundation managers ☒ \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ NY			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <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	Yes	
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶WWW WGPFOUNDATION ORG				
14	The books are in care of ▶PAULA MILLER Telephone no ▶(315) 476-3000 Located at ▶PO BOX 3327 SYRACUSE NY ZIP +4 ▶132203327			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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		
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?. ☐ Yes ☒ 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).	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?. ☐ 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

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

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

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WILLIAM G POMEROY	TRUSTEE	0	0	0
PO BOX 3327	2 00			
SYRACUSE, NY 13220				
SANDRA POMEROY	TRUSTEE	0	0	0
PO BOX 3327	2 00			
SYRACUSE, NY 13220				
PAULA MILLER	TRUSTEE	0	0	0
PO BOX 3327	25 00			
SYRACUSE, NY 13220				
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		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	0

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	12,905,941
b	Average of monthly cash balances.	1b	8,878,324
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	21,784,265
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	21,784,265
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	326,764
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	21,457,501
6	Minimum investment return. Enter 5% of line 5.	6	1,072,875

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	1,072,875
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	5,246
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	5,246
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,067,629
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,067,629
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,067,629

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	875,998
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
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	875,998
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	5,246
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	870,752
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				1,067,629
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			862,540	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 875,998				
a Applied to 2012, but not more than line 2a			862,540	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				13,458
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions.		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions.			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014.				1,054,171
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a Excess from 2009.				
b Excess from 2010.				
c Excess from 2011.				
d Excess from 2012.				
e 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 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))

WILLIAM G POMEROY

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 or e-mail address of the person to whom applications should be addressed

PAULA MILLER
PO BOX 3327
SYRACUSE, NY 13220
(315) 476-3000

b

The form in which applications should be submitted and information and materials they should include

APPLICATIONS SHOULD BE SUBMITTED IN WRITTEN FORM ALONG WITH A COPY OF THE EXEMPTION CERTIFICATE GRANTING 501(C)(3) STATUS RECEIVED FROM THE INTERNAL REVENUE SERVICE

c

Any submission deadlines

SUBMISSION DEADLINES VARY BY REGION - REFER TO THE HISTORIC MARKER PROGRAM REGIONAL GRANT SCHEDULE

d

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

SUBMISSIONS FOR THE HISTORIC MARKER PROGRAM SHOULD BE LIMITED TO NEW YORK STATE AND TO THE 1740-1914 TIME FRAME

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	868,597
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Part XVII

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

(1)

Cash.

(2)

Other assets.

b

Other transactions

(1)

Sales of assets to a noncharitable exempt organization.

(2)

Purchases of assets from a noncharitable exempt organization.

(3)

Rental of facilities, equipment, or other assets.

(4)

Reimbursement arrangements.

(5)

Loans or loan guarantees.

(6)

Performance of services or membership or fundraising solicitations.

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

d

If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

Yes

No

1a(1)

No

1a(2)

No

1b(1)

No

1b(2)

No

1b(3)

No

1b(4)

No

1b(5)

No

1b(6)

No

1c

No

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

Yes

No

b

If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

2014-05-15

Date

Title

May the IRS discuss this return with the preparer shown below (see instr.)?

Yes

No

Paid Preparer Use Only

Print/Type preparer's name
MICHAEL J REILLY
CPA

Preparer's Signature

Date

Check if self-employed

PTIN
P00435562

Firm's name

DANNIBLE & MCKEE LLP

Firm's EIN

33-0996661

Firm's address

221 SOUTH WARREN ST SYRACUSE, NY 13202

Phone no

(315) 472-9127

Form 990-PF (2013)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN RED CROSS 344 WEST GENESEE STREET SYRACUSE,NY 13202	N/A	PUBLIC	DONATION	500
APHNYS 2013 PO BOX 366 CHENANGO BRIDGE,NY 13745	N/A	PUBLIC	ANNUAL AWARD BANQUET	1,000
BE THE MATCH FOUNDATION 3001 BROADWAY STREET NE SUITE 601 MINNEAPOLIS,MN 55413	N/A	PUBLIC	DONATION	37,000
BMT INFONET 2310 SKOKIE VALLEY ROAD SUITE 104 HIGHLAND PARK,IL 60035	N/A	PUBLIC	SURVIVOR SYMPOSIUM	7,500
BRAG HISTORICAL SOCIETY 390 MAIN STREET BOLIVAR,NY 14715	N/A	PUBLIC	HISTORIC MARKER GRANT AND NATIONAL REGISTER HISTORICAL PLACES SIGN	3,080
BRIGHAM AND WOMEN'S HOSPITAL PO BOX 414905 BOSTON,MA 022414905	N/A	PUBLIC	DONATION	150
CAIRO HISTORICAL SOCIETY PO BOX 803 CAIRO,NY 12413	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
CARINGBRIDGE PO BOX 414905 BOSTON,MA 022414905	N/A	PUBLIC	DONATION	500
CENTRAL NEWYORK GENEOLOGICAL SOCIETY PO BOX 104 COLVIN STATION SYRACUSE,NY 13205	N/A	PUBLIC	NYSFHC SPONSOR	550
CHARLOTTE COMMUNITY DEVELOPMENT CORPORATION PO BOX 12664 GREECE,NY 14612	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
CHITTENANGO LANDING CANAL BOAT MUSEUM 7010 LAKEPORT ROAD CHITTENANGO,NY 13037	N/A	PUBLIC	DONATION	100
CITY OF BATAVIA 1 BATAVIA CITY CENTER BATAVIA,NY 14020	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
CNY COMMUNITY FOUNDATION 431 EAST FAYETTE STREET SUITE 100 SYRACUSE,NY 13202	N/A	PUBLIC	DONATION	585,000
COHOCTON HISTORICAL SOCIETY 62196 ST ROUTE 415 COHOCTON,NY 14826	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
CROUSE HEALTH FOUNDATION 736 IRVING AVENUE SYRACUSE,NY 13210	N/A	PUBLIC	TOMOSYNTHESIS EQUIPMENT AND LIGHTS OF LOVE CAMPAIGN	6,500
Total  3a				868,597

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
DANA FARBER CANCER INSTITUTE 10 BROOKLINE PLACE FL 6 BROOKLINE,MA 02445	N/A	PUBLIC	FUND FOR ACUTE MYELOGENOUS LEUKEMIA AND FUND FOR STEM CELL TRANSPLANT RESEARCH	80,000
DAUGHTERS OF UNION VETERANS OF THE CIVIL WAR 11077 HOXIE ROAD WEST EDMESTON,NY 13485	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
DODGE PRATT NORTHAM ART & COMMUNITY CENTER 106 SCHUYLER STREET BOONVILLE,NY 13309	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
ERIE CANAL MUSEUM 318 ERIE BOULEVARD EAST SYRACUSE,NY 13202	N/A	PUBLIC	GREETINGS FROM SKANEATELES SPONSORSHIP	2,500
FARMINGVILLE HISTORICAL SOCIETY PO BOX 311 FARMINGVILLE,NY 11738	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
FIRST PRESBYTERIAN CHURCH OF LOWVILLE 7707 NORTH STATE STREET LOWVILLE,NY 13367	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
FRIENDS OF TACONIC STATE PARK PO BOX 222 COPAKE FALLS,NY 12517	N/A	PUBLIC	COPAKE IRON WORKS FURNACE PROJECT	5,000
GENESEE COUNTY HISTORY DEPARTMENT 3837 WEST MAIN STREET BATAVIA,NY 14020	N/A	PUBLIC	HISTORIC MARKER GRANT	2,100
GEORGE & REBECCA BARNES FOUNDATION 930 JAMES STREET SYRACUSE,NY 13203	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	449
HISTORIC NORTHAMPTON PO BOX 1776 WILLIAMSBURG,VA 231871776	N/A	PUBLIC	DONATION	100
HISTORICAL SOCIETY OF THE TONAWANDAS 113 MAIN STREET TONAWANDA,NY 14150	N/A	PUBLIC	HISTORIC MARKER GRANT	2,100
HISTORICAL SOCIETY OF WHITEHALL PO BOX 238 WHITEHALL,NY 12887	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
HOSPICE FOUNDATION OF CNY 990 SEVENTH NORTH STREET LIVERPOOL,NY 13088	N/A	PUBLIC	DONATION	500
KETCHAM INN FOUNDATION INC 81 MAIN STREET PO BOX 626 CENTER MORICHES,NY 11934	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
LEUKEMIA & LYMPHOMA SOCIETY 4053 MAPLE ROAD SUITE 105 AMHERST,NY 14226	N/A	PUBLIC	LIGHT THE NIGHT	5,000
Total  3a				868,597

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MARCELLUS HISTORICAL SOCIETY PO BOX 165 MARCELLUS,NY 13108	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	424
MARROW NATION 3433 CARMICHAEL STREET PALM HARBOR,FL 34684	N/A	PUBLIC	BONE MARROW DRIVE	42,650
MCMAHON RYAN CHILD ADVOCACY SITE 601 EAST GENESEE STREET SYRACUSE,NY 13202	N/A	PUBLIC	2013 SPONSORSHIP OF 100 HOLES FOR KIDS	1,000
MIDDLETOWN HISTORICAL SOCIETY OF STEUBEN COUNTY 41 MAIN STREET SUITE 101 ADDISON,NY 14801	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
NEW WOODSTOCK REGIONAL HISTORICAL SOCIETY 2641 REAILROAD STREET PO BOX 45 NEW WOODSTOCK,NY 13122	N/A	PUBLIC	HISTORIC MARKER GRANT	2,100
NEW YORK GENEOLOGICAL & BIOGRAPHICAL SOCIETY 36 WEST 44TH STREET 7TH FLOOR NEW YORK,NY 100368105	N/A	PUBLIC	DONATION	5,000
NEW YORK STATE PARKS 504 WEST MAIN STREET PO BOX 27 SACKETS HARBOR,NY 13685	N/A	PUBLIC	HISTORIC MARKER GRANT	2,100
NEWFIELD HISTORICAL SOCIETY 198 MAIN STREET NEWFIELD,NY 14867	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
NIAGARA COUNTY HISTORICANS OFFICE 59 PARK AVENUE LOCKPORT,NY 14094	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
NORTH COUNTRY UNDERGROUND RAILROAD HISTORICAL ASSOCIATION 1131 MACE CHASM ROAD AUSABLE CHASM,NY 12911	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
NSDAR SCHOHARIE CHAPTER 268 MAIN STREET PO BOX 711 SCHOHARIE,NY 12157	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
OAK HILL PRESERVATION ASSOCIATION 7892 ROUTE 81 PO BOX 22 OAK HILL,NY 12460	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
ONONDAGA HISTORICAL ASSOCIATION 321 MONTGOMERY STREET SYRACUSE,NY 13202	N/A	PUBLIC	OHA MEDAL BREAKFAST, HISTORIC MARKER GRANT AND GLORIOUS WORKPLACES SPONSOR	3,650
PALATINE SETTLEMENT SOCIETY PO BOX 183 ST JOHNSVILLE,NY 13452	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
PENFIELD HOMESTEAD MUSEUM 703 CREEK ROAD CROWN POINT,NY 12928	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
Total  3a				868,597

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SARAH HOUSE 100 ROBERTS AVENUE SYRACUSE, NY 13207	N/A	PUBLIC	DONATION TO FUND STAYS FOR LEUKEMIA PATIENTS/FAMILIES	7,500
SCHOHARIE COLONIAL HERITAGE ASSOCIATION PO BOX 544 SCHOHARIE, NY 12157	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	1,960
SCHUYLER COUNTY HISTORICAL SOCIETY 108 NORTH CATHERINE STREET PO BOX 651 MONTOUR FALLS, NY 14865	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
STORYCORP 80 HANSON PLACE 2ND FLOOR BROOKLYN, NY 11217	N/A	PUBLIC	DONATION	100
SUFFOLK COUNTY VANDERBILT MUSEUM 180 LITTLE NECK ROAD CENTERPORT, NY 11721	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
TAYLOR HISTORICAL SOCIETY 4332 CHENINGO-SOLON POND ROAD CINCINNATUS, NY 13040	N/A	PUBLIC	HISTORIC MARKER GRANT AND NATIONAL REGISTER PROGRAM	4,048
THE BROWNE HOUSE HISTORICAL SOCIETY 37-01 BROWNE STREET FLUSHING, NY 11354	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
THE COLONIAL WILLIAMSBURG FOUNDATION PO BOX 1776 WILLIAMSBURG, VA 231871776	N/A	PUBLIC	DONATION	100
THE SCHROEPPPEL HISTORICAL SOCIETY 486 MAIN STREET PHOENIX, NY 13135	N/A	PUBLIC	BUILDING REPAIRS	2,689
THE VILLAGE IMPROVEMENT SOCIETY OF GILBERTSVILLE PO BOX 61 GILBERTSVILLE, NY 13776	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
TOWN OF ALABAMA HISTORY DEPARTMENT 2218 JUDGE ROAD OAKFIELD, NY 14125	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
TOWN OF BALLSTON 323 CHARLTON ROAD BALLSTON SPA, NY 12020	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
TOWN OF BEEKMANTOWN 571 SPELLMAN ROAD WEST CHAZY, NY 12992	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
TOWN OF BROOKHAVEN ONE INDEPENDENCE HILL FARMINGVILLE, NY 11738	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
TOWN OF COVENTRY 1839 STATE HIGHWAY 206 GREENE, NY 13778	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
Total  3a				868,597

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
TOWN OF DEERPARK 420 ROUTE 209 PO BOX 621 HUGUENOT,NY 12746	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	449
TOWN OF DURHAM 7309 ROUTE 81 EAST DURHAM,NY 12423	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
TOWN OF ELLICOTTVILLE 1 WEST WASHINGTON STREET PO BOX 600 ELLICOTTVILLE,NY 14731	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
TOWN OF FARMINGTON 1000 COUNTY ROAD 8 FARMINGTON,NY 14425	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
TOWN OF GORHAM 4736 SOUTH STREET GORHAM,NY 14461	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
TOWN OF LYNDON 852 LYNDON CENTER ROAD CUBA,NY 14727	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
TOWN OF MARTINSBURG 5404 CEMETERY ROAD PO BOX 8 MARTINSBURG,NY 13404	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	449
TOWN OF MIDDLESEX 1216 ROUTE 245 MAIN STREET PO BOX 147 MIDDLESEX,NY 14507	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
TOWN OF OSSIAN 4706 OSSIAN HILL ROAD DANSVILLE,NY 14437	N/A	PUBLIC	HISTORIC MARKER GRANT	2,100
TOWN OF PITCHER 156 PITCHER SPRINGS ROAD PITCHER,NY 13136	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
TOWN OF PLATTSBURGH 151 BANKER ROAD PLATTSBURGH,NY 12901	N/A	PUBLIC	HISTORIC MARKER GRANT	2,100
TOWN OF POMPEY HISTORICAL SOCIETY 8354 ROUTE 20 MANLIUS,NY 13104	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
TOWN OF TAYLOR 3845 CHENINGO SOLON POND ROAD CINCINNATUS,NY 13040	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
TOWN OF VESTAL 605 VESTAL PARKWAY WEST VESTAL,NY 13850	N/A	PUBLIC	HISTORIC MARKER GRANT	4,200
ULSTER COUNTY HISTORICAL SOCIETY PO BOX 279 STONE RIDGE,NY 12484	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
Total  3a				868,597

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
VICTOR HISTORICAL SOCIETY 7370 VALENTOWN SQUARE PO BOX 472 VICTOR,NY 14564	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
VILLAGE OF BROCTON 34 WEST MAIN STREET BROCTON,NY 14716	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
VILLAGE OF HAGAMAN 86 PAWLING STREET HAGAMAN,NY 12086	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
VILLAGE OF SACKETS HARBOR 112 NORTH BROAD STREET PO BOX 335 SACKETS HARBOR,NY 13685	N/A	PUBLIC	HISTORIC MARKER GRANT	1,050
WEST SENECA HISTORICAL SOCIETY 919 WEST MILL ROAD WEST SENECA,NY 14224	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	449
WESTFIELD FLATS CEMETERY ASSOCIATION INC 9 ROCKLAND ROAD ROSCO,NY 12776	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
WHITEHALL SKENE MANOR PRESERVATION INC 8 POTTER TERRACE WHITEHALL,NY 12887	N/A	PUBLIC	NATIONAL REGISTER HISTORICAL PLACES SIGN	980
WVBE-FM 3934 ELECTRIC ROAD SW ROANOKE,VA 24018	N/A	PUBLIC	BONE MARROW DRIVE	2,150
Total  3a				868,597

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

Name of the organization THE WILLIAM G POMEROY FOUNDATION	Employer identification number 20-6572301
---	---

Organization type (check one)

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

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

General Rule

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

Special Rules

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

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

[illegible]

Employer identification number
20-6572301

[illegible]

Name of organization THE WILLIAM G POMEROY FOUNDATION	Employer identification number 20-6572301
---	---

Part III

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

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

Use duplicate copies of Part III if additional space is needed

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

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

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

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

TY 2013 Accounting Fees Schedule

Name: THE WILLIAM G POMEROY FOUNDATION

EIN: 20-6572301

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	5,240	3,930		1,310

TY 2013 General Explanation Attachment**Name:** THE WILLIAM G POMEROY FOUNDATION**EIN:** 20-6572301

Identifier	Return Reference	Explanation
DONOR ADVISED FUNDS	990-PF, PART VII-A, NUMBER 12	DISTRIBUTIONS TO A DONOR ADVISED FUND ARE TREATED AS QUALIFYING DISTRIBUTIONS BY THE FOUNDATION. DISTRIBUTIONS FROM THE DONOR ADVISED FUND WILL BE USED TO PROVIDE FINANCIAL SUPPORT TO AN ORGANIZATION ORGANIZED AND OPERATED EXCLUSIVELY FOR RELIGIOUS, CHARITABLE, SCIENTIFIC, OR EDUCATIONAL PURPOSES.

TY 2013 Investments Corporate
Stock Schedule

Name: THE WILLIAM G POMEROY FOUNDATION
EIN: 20-6572301

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AVNET INC	172,691	172,691
E M C CORP MASS	35,210	35,210
GENERAL ELECTRIC CO	184,998	184,998
INTL BUSINESS MACH	225,084	225,084
MICROSOFT CORP	310,503	310,503
NETWORK APPLIANCE CORP	69,938	69,938
PC CONNECTION INC	18,637	18,637
POWERSHARES QQQ	976,356	976,356
SPDR S&P 500 ETF TRUST UNIT SER 1 S&P	904,981	904,981
SECTOR SPDR TR SHS BEN INT FINANCIAL	153,020	153,020
SYMANTEC CORP	5,282	5,282
VERIZON COMMUNICATIONS	98,280	98,280
WALMART STORES	165,249	165,249
FIDELITY INT'L DISCOVERY	492,697	492,697
FIDELITY LATIN AMERICA	172,821	172,821
FIDELITY SMALL CAP STOCK	169,025	169,025
FIDELITY BLUE CHIP	528,691	528,691
FIDELITY SMALL CAP VALUE	720,231	720,231
FIDELITY SELECT TECHNOLOGY	327,448	327,448
FIDELITY SELECT COMMUNICATION & EQUIPMENT PORT	57,323	57,323
FIDELITY SELECT TELECOMM	27,276	27,276
FIDELITY PURITAN	237,662	237,662
FIDELITY SELECT SOFTWARE & COMPUTER	578,710	578,710
FIDELITY EXPORT	871,820	871,820
FIDELITY VALUE	746,105	746,105
VENTAS INC	263,488	263,488
ALLSCRIPTS HEATHCARE SOLUTIONS, INC.	29,374	29,374
AMAZON.COM, INC.	598,185	598,185
EBAY, INC.	400,514	400,514
ENTERPRISE GP HOLDINGS LP	163,548	163,548

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EXXON MOBIL CORP.	323,840	323,840
MCDONALDS CORP.	48,515	48,515
FIDELITY HIGH INCOME	1,258,097	1,258,097
EXELON CORP	54,698	54,698
FRONTIER COMMUNICATIONS CORP COM	1,116	1,116
ISHARES TRUST S&P SMALLCAP 600 INDEX FD	218,260	218,260
SPDR DOW JONES INDL AVERAGE ETF TR UNIT SER 1	579,655	579,655
TOYOTA MOTOR CORP ADR-EACH REP 2 ORD	73,152	73,152
DU PONT E I DE NEMOURS & CO	58,473	58,473
FORD MTR CO DEL COM	122,314	122,314
INTEL CORP	155,730	155,730
SPRINT NEXTEL CORP FON SHS	5,622	5,622
STURM RUGER & CO INC	80,399	80,399
CVS CAREMARK CORP	135,983	135,983
COMMUNITY BK SYS INC	43,648	43,648
COSTCO WHOLESALE CORP	107,118	107,118
DISNEY WALT CO	38,200	38,200
DIRECTV COM	48,342	48,342
ISHARES TRANSPORTATION AVERAGE ETF	131,900	131,900
JPMORGAN CHASE & CO	58,480	58,480
LOEWS CORP	53,064	53,064
METLIFE INC COM	199,504	199,504
MOBILE MINI INC	8,236	8,236
NBT BANCORP INC	90,236	90,236
PROCTER & GAMBLE CO	16,282	16,282
RESMED INC	160,072	160,072
ROYAL CARIBBEAN CRUISES COM	256,068	256,068
SECTOR SPDR TR SHS BEN INT ENERGY	106,212	106,212
SELECT SECTOR SPDR TR HEALTH CARE FORMERLY CONSUMER SVCS	27,720	27,720
TJX COMPANIES INC	388,753	388,753

Name of Stock	End of Year Book Value	End of Year Fair Market Value
UNITED STATES NATURAL GAS FUND LP UNIT	31,035	31,035
UNITEDHEALTH GROUP	188,250	188,250
YAHOO INC	16,176	16,176
FIDELITY CONSERVATIV INCOME BOND	3,009,095	3,009,095

TY 2013 Investments Government Obligations Schedule

Name: THE WILLIAM G POMEROY FOUNDATION

EIN: 20-6572301

US Government Securities - End of Year Book Value:	837,935
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US Government Securities - End of Year Fair Market Value:	837,935
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State & Local Government Securities - End of Year Book Value:	0
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State & Local Government Securities - End of Year Fair Market Value:	0
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TY 2013 Other Assets Schedule

Name: THE WILLIAM G POMEROY FOUNDATION

EIN: 20-6572301

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ACCRUED INTEREST	2,299	639	639

TY 2013 Other Decreases Schedule

Name: THE WILLIAM G POMEROY FOUNDATION

EIN: 20-6572301

Description	Amount
NONDEDUCTIBLE EXPENSES	7

TY 2013 Other Expenses Schedule**Name:** THE WILLIAM G POMEROY FOUNDATION**EIN:** 20-6572301

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DUES AND SUBSCRIPTIONS	725	363		362
INVESTMENT FEES	5	5		0
MISCELLANEOUS EXPENSES	1,570	0		1,570
OUTSIDE SERVICES	750	0		750

TY 2013 Other Income Schedule

Name: THE WILLIAM G POMEROY FOUNDATION

EIN: 20-6572301

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ENTERPRISE PRODUCTS PARTNERS L P	-6,612	-6,612	-6,612
UNITED STATES NATURAL GAS FUND LP	-2,212	-2,212	-2,212

TY 2013 Other Increases Schedule

Name: THE WILLIAM G POMEROY FOUNDATION

EIN: 20-6572301

Description	Amount
UNREALIZED GAIN ON SECURITIES HELD	1,864,959

TY 2013 Taxes Schedule**Name:** THE WILLIAM G POMEROY FOUNDATION**EIN:** 20-6572301

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	4,258	0		0
NYS FILING FEE	750	0		750
FOREIGN TAX PAID	1,072	1,072		0