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Form **990-PF****Return of Private Foundation**

OMB No 1545-0052

2013Department of the Treasury
Internal Revenue Service

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

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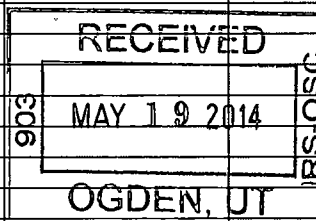
▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2013 or tax year beginning , 2013, and ending , 20

Name of foundation THE AMY & MARK SHIRVAN FAMILY FDN		A Employer identification number 22-3510223
Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see instructions) (973) 779-3434
249 CHURCHILL ROAD		
City or town, state or province, country, and ZIP or foreign postal code TENAFLY, NJ 07670		C If exemption application is pending, check here ☐
G Check all that apply	☐ Initial return ☐ Final return ☐ Address change	☐ Initial return of a former public charity ☐ Amended return ☐ Name change
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 338,119.		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
J Accounting method ☒ Cash ☐ Accrual ☐ 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 ☐

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)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	5,762.	5,762.		ATCH 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	13,426.			
	b Gross sales price for all assets on line 6a 24,607.				
	7 Capital gain net income (from Part IV, line 2)		13,426.		
	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) ATCH 2	887.				
12 Total. Add lines 1 through 11	20,075.	19,188.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) ATCH 3	381.	81.		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) ATCH 4	2,948.	2,948.		
	24 Total operating and administrative expenses. Add lines 13 through 23	3,329.	3,029.		
	25 Contributions, gifts, grants paid	9,315.			9,315.
26 Total expenses and disbursements Add lines 24 and 25	12,644.	3,029.		9,315.	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	7,431.				
b Net investment income (if negative, enter -0-)		16,159.			
c Adjusted net income (if negative, enter -0-)					



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SCANNED MAY 28 2014

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	4,776.	11,049.	11,049.
	2 Savings and temporary cash investments	3,353.	5,521.	5,521.
	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			
	10 a Investments - U S and state government obligations (attach schedule), b Investments - corporate stock (attach schedule) ATCH 5 c Investments - corporate bonds (attach schedule),	163,026.	161,657.	278,633.
	11 Investments - land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule) ATCH 6	33,572.	33,996.	42,916.
	14 Land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	204,727.	212,223.	338,119.
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 ▶ ATCH 7)		65.	
23 Total liabilities (add lines 17 through 22)	0	65.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here . ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, . . . ▶ ☒ check here and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	204,727.	212,158.	
	30 Total net assets or fund balances (see instructions)	204,727.	212,158.	
	31 Total liabilities and net assets/fund balances (see instructions)	204,727.	212,223.	

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	204,727.
2 Enter amount from Part I, line 27a	2	7,431.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	212,158.
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	212,158.

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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 PART IV SCHEDULE					
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					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
a					
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	13,426.	
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	0	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	6,900.	261,240.	0.026412
2011	10,702.	232,709.	0.045989
2010	9,760.	217,891.	0.044793
2009	8,190.	170,970.	0.047903
2008	9,213.	213,372.	0.043178
2 Total of line 1, column (d)			2 0.208275
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 0.041655
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			4 308,678.
5 Multiply line 4 by line 3			5 12,858.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 162.
7 Add lines 5 and 6			7 13,020.
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 9,315.

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

1 a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		
	Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	323.
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	323.
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	323.
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	104.
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	104.
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	219.
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-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?		X
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		
c Did the foundation file Form 1120-POL for this year?		X
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?		X
If "Yes," attach a detailed description of the activities		
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		X
If "Yes," attach the statement required by General Instruction T		
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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ NJ, _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation.		X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV.		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions).	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address N/A				
14	The books are in care of AMY AND MARK SHIRVAN Telephone no 201-567-1494			
	Located at 249 CHURCHILL ROAD TENAFLY, NJ ZIP+4 07670			
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 X
See the 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 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	X
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		
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		
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	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? ☐	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013? ☐	4b	X

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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? ☐ Yes ☒ No **6b**

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? ☐ Yes ☒ No **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
ATCH 8		0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1 - see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000 ☐

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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 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 NONE	
2	
All other program-related investments See instructions	
3 NONE	
Total. Add lines 1 through 3 ▶	

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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	303,526.
b	Average of monthly cash balances	1b	9,853.
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	313,379.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	313,379.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	4,701.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	308,678.
6	Minimum investment return. Enter 5% of line 5	6	15,434.

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	15,434.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	323.
b	Income tax for 2013. (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	323.
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	15,111.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	15,111.
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	15,111.

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	9,315.
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	9,315.
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	9,315.

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				15,111.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			7,899.	
b Total for prior years 20 <u>11</u> , 20 <u>10</u> , 20 <u>09</u>				
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 ▶ \$ <u>9,315.</u>				
a Applied to 2012, but not more than line 2a			7,899.	
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2013 distributable amount				1,416.
e Remaining amount distributed out of corpus				
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				
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				13,695.
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	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)

NOT APPLICABLE

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

- b** Check box to indicate whether the foundation is a private operating foundation described in section

4942(j)(3) or

4942(j)(5)

- 2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

- b 85% of line 2a**

- C** Qualifying distributions from Part XII, line 4 for each year listed .

- d** Amounts included in line 2c not used directly for active conduct of exempt activities

- e** Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c

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

- a "Assets" alternative test - enter

- (1) Value of all assets . . .**

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

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

- C "Support" alternative test - enter**

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

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

- (3) Largest amount of support from an exempt organization. . . .

- (4) Gross investment income .

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

- ## 1 Information Regarding Foundation Managers:

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

ATTACHMENT 9

- b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

N/A

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

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

- a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

ATCH 10

- b** The form in which applications should be submitted and information and materials they should include:

ATCH 11

- c Any submission deadlines**

NONE

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

NONE

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

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 SCHEDULE 1 ATTACHED	NONE	PC	CHARITABLE	9,315.
Total ▶ 3a				9,315.
b Approved for future payment				
Total ▶ 3b				

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities			14	5,762.		
5 Net rental income or (loss) from real estate						
a Debt-financed property						
b Not debt-financed property						
6 Net rental income or (loss) from personal property .						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory			18	13,426.		
9 Net income or (loss) from special events . . .						
10 Gross profit or (loss) from sales of inventory . .						
11 Other revenue a _____						
b ATCH 12 _____				887.		
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)				20,075.		
13 Total. Add line 12, columns (b), (d), and (e)						

(See worksheet in line 13 instructions to verify calculations)

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions)
▼	

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. A vertical margin line is positioned on the left side, creating a narrow left margin. The paper appears to be from a notebook or a standard ruled document. There are no markings, text, or drawings on the page.

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

- | | | Yes | No |
|----------|--|-----|----|
| 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 | | X |
| | (2) Other assets | | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | X |
| 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. | | |

[illegible]

- 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) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date 5/8/14

► DIRECTOR
Title

May the IRS discuss this return with the preparer shown below (see instructions)? ☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

FREDERICK ACKERMAN

~~Preparer's signature~~

ANCHIN LLP

Date

5/7/14

Check ☐ if self-employed

PTIN

P00303895

Firm's name ► ANCHIN BLOCK

Firm's name	▶	
Firm's address	▶	1375 BROADWAY

10018-7001

Phone no 212-840-3456

Form **990-PF** (2013)

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
24,607.		PUBLICLY TRADED SECURITIES 11,181.					VAR 13,426.	VAR
TOTAL GAIN(LOSS)							<u>13,426.</u>	

ATTACHMENT 1

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
DIVIDENDS	5,762.	5,762.
TOTAL	<u>5,762.</u>	<u>5,762.</u>

ATTACHMENT 2FORM 990PF, PART I - OTHER INCOME

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
FEDERAL EXCISE TAX REFUND	887.
TOTALS	<u>887.</u>

ATTACHMENT 3FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
FEDERAL EXCISE TAX	300.	
FOREIGN TAXES PAID	81.	81.
TOTALS	<u>381.</u>	<u>81.</u>

ATTACHMENT 4

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INVESTMENT FEE	2,948.	2,948.
TOTALS	2,948.	2,948.

ATTACHMENT 5

FORM 990PF, PART II - CORPORATE STOCK

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
SEE SCHEDULE ATTACHED	161,657.	278,633.
TOTALS	<u>161,657.</u>	<u>278,633.</u>

ATTACHMENT 6

FORM 990PF, PART II - OTHER INVESTMENTS

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
SEE SCHEDULE ATTACHED	33,996.	42,916.
TOTALS	<u>33,996.</u>	<u>42,916.</u>

ATTACHMENT 7FORM 990PF, PART II - OTHER LIABILITIES

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>
DUE TO BROKER	65.
TOTALS	<u>65.</u>

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEESATTACHMENT 8

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
AMY SHIRVAN 249 CHURCHILL ROAD TENAFLY, NJ 07670	DIRECTOR 1.00	0	0	0
MARK SHIRVAN 249 CHURCHILL ROAD TENAFLY, NJ 07670	DIRECTOR 2.00	0	0	0
GRAND TOTALS		0	0	0

ATTACHMENT 9

FORM 990PF, PART XV - INFORMATION REGARDING FOUNDATION MANAGERS

AMY SHIRVAN
MARK SHIRVAN

ATTACHMENT 10

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

MARK SHIRVAN - DIRECTOR
249 CHURCHILL ROAD
TENAFLY, NJ 07670
201-567-1494

ATTACHMENT 11

990PF, PART XV - FORM AND CONTENTS OF SUBMITTED APPLICATIONS

WRITTEN REQUEST STATING THE PURPOSE AND USE OF FUNDS. REQUEST TO MADE
TO DIRECTORS AT ADDRESS OF THE FOUNDATION.

FORM 990-PF, PART XVI-A - ANALYSIS OF OTHER REVENUE

ATTACHMENT 12				
DESCRIPTION	BUSINESS CODE	AMOUNT	EXCLUSION CODE	RELATED OR EXEMPT FUNCTION INCOME
FEDERAL EXCISE TAX REFUND			14	887.
TOTALS				887.

THE AMY AND MARK SHIRVAN FAMILY FOUNDATION, INC
EIN: 22-3510223
SCHEDULE 1 - CHARITABLE CASH DONATIONS
For The Year Ended December 31, 2013

DESCRIPTION	Foundation Status of Recipients	Relationship	Purpose of Grant	AMOUNT
The Breast Cancer Research Foundation 459 Columbus Avenue – Suite 151 New York, NY 10024	Public Charity	NONE	Charitable	550
JCC on the Palisades 411 East Clinton Avenue Tenaflly, NJ 07670	Public Charity	NONE	Charitable	3,000
The Community Chest 310 Engle Street Hackensack, NJ 07601	Public Charity	NONE	Charitable	250
Center for Food Action 192A West Demarast Avenue Englewood, NJ 07631	Public Charity	NONE	Charitable	300
The Arnold P. Gold Foundation 619 Palisades Avenue – 1st Floor Englewood Cliffs, NJ 07632	Public Charity	NONE	Charitable	250
Tenaflly Volunteer Ambulance PO Box 355 Tenaflly, NJ 07670	Public Charity	NONE	Charitable	100
Tenaflly Fire Association 100 Riveredge Road Teaneck, NJ 07666	Public Charity	NONE	Charitable	100
Tenaflly P B A Local 376 PO Box 376 Tenaflly, NJ 07670	Public Charity	NONE	Charitable	100
Camp Dream Street 411 East Clinton Avenue Tenaflly, NJ 07670	Public Charity	NONE	Charitable	250
Jewish Family Service 1485 Teaneck Road Teaneck, NJ 07666	Public Charity	NONE	Charitable	180
Play for Pink 175 East 74th Street, #17-B New York, NY 10021	Public Charity	NONE	Charitable	825
The Englewood Hospital Medical Center Foundation 350 Engle Street Englewood, NJ	Public Charity	NONE	Charitable	2500
YCS Foundation 235 Main Street, 3rd Floor Hackensack, NJ 07601	Public Charity	NONE	Charitable	150
THON The Penn State IFC/Panhellenic Dance Marathon 210 Hetzel Union Building University Park, PA 16802-6601	Public Charity	NONE	Charitable	200
Foundation for Angelman Syndrome Therapeutics P O Box 608 Downers Grove, IL 60515-0608	Public Charity	NONE	Charitable	200
St Jude Childrens Hospital 262 Danny Thomas Place Memphis, TN 38105	Public Charity	NONE	Charitable	360
TOTAL				9,315



Account Detail

Portfolio Management Basic Securities Account
944-107487-042

AMY & MARK SHIRVAN FAMILY
FOUNDATION INC

Investment Objectives †: Capital Appreciation, Income

Investment Advisory Account

† See the Expanded Disclosures for more information about investment objectives. Please review for accuracy and inform us if your investment objectives change.

HOLDINGS

This section reflects positions purchased/sold on a trade date basis, and will include positions purchased and omit positions sold in the current month. "Market Value" and "Unrealized Gain/(Loss)" are representative values as of the last business day of the statement period indicated, may not reflect the value that could be obtained in the market. See "Pricing of Securities" in the Expanded Disclosures. Fixed Income securities are sorted by maturity or pre-refunding date, and alphabetically within date. Estimated annual income and estimated yield for certain securities may include return of principal or capital gains which could overstate such estimates. Actual income or yield may be lower or higher than the estimates. Estimated yield reflects only the income generated by an investment and, it does not reflect changes in its price, which may fluctuate. Structured products appear in various statement product categories and are identified as "Structured Products" in the Security Description column. Estimated accrued interest, estimated annual income and estimated yield for structured products with a contingent income feature (such as Range Accrual Notes or Contingent Income Notes) assume specified accrual conditions are met during the relevant observation period and payment in full of all contingent interest. If you hold structured products, see "Special Considerations Regarding Structured Products" in the Disclosures. New Treasury regulations require that we report on Form 1099-B after the close of the tax year your adjusted cost basis and classify the gain or loss as either long-term or short-term on the sale of covered securities acquired on or after January 1, 2011. These regulations also require that we make basis adjustments on covered securities due to wash sales, certain corporate actions and transfers by gift or inheritance, which will be reflected on your Form 1099-B. Cost basis is reflected on monthly statements for informational purposes only and should not be used in the preparation of your income tax returns. Refer to the Expanded Disclosures for additional information.

CASH, BANK DEPOSIT PROGRAM AND MONEY MARKET FUNDS

Cash, Bank Deposit Program, and Money Market Funds are generally displayed on a settlement date basis. Estimated Annual Income, Accrued Interest, and APY% will only be displayed for fully settled positions

Description	Value	Estimated Annual Income	7-Day Current Yield %	Annual Percentage Yield %
CASH	\$35.33			
MS LIQUID ASSET FUND	5,485.88	0.55	0.010	—
Percentage of Assets %				1.7%
CASH, BDP, AND MMFS				Estimated Annual Income Accrued Interest \$0.55 \$0.00

Money market funds seek to maintain a share price of \$1.00, therefore the dollar amounts listed equal the number of shares. Additional information concerning these transactions is available upon request. For more information about the pricing of Money Market Funds, please see the Expanded Disclosures. The money market funds reflected above include the balances in your automatic sweep feature, if any, and may include other money market funds that have been purchased in your account.

STOCKS

COMMON STOCKS

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
ABBOTT LABORATORIES (ABT)	1/6/00	140,000	\$15.705	\$2,198.68	\$5,366.20	\$3,167.52 LT		
	2/15/07	25,000	25.334	633.34	958.25	324.91 LT		
	Total	165,000		2,832.02	6,324.45	3,492.43 LT	145.20	2.29
Share Price: \$38.330, Next Dividend Payable 02/2014								

Morgan Stanley

Portfolio Management Basic Securities Account
944-107487-042AMY & MARK SHIRVAN FAMILY
FOUNDATION INC

Account Detail

STOCKS

COMMON STOCKS (CONTINUED)

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
ABBVIE INC COM (ABBV)	1/6/00	140,000	17.031	2,384.29	7,393.40	5,009.11 LT		
	2/15/07	25,000	27.472	686.80	1,320.25	633.45 LT		
Total		165,000		3,071.09	8,713.65	5,642.56 LT	264.00	3.02
Share Price: \$52.810; Next Dividend Payable 02/2014								
ACCENTURE PLC IRELAND CL A (ACN)	6/7/06	154,000	27.364	4,214.04	12,661.88	8,447.84 LT	286.44	2.26
Share Price: \$82.220; Next Dividend Payable 05/2014								
ANHEUSER BUSCH INBEV SA SPON (BUD)	7/31/13	60,000	95.803	5,748.20	6,387.60	639.40 ST	150.24	2.35
Share Price: \$106.460								
APPLE INC (AAPL)	9/29/11	13,000	397.580	5,168.54	7,293.26	2,124.72 LT	158.60	2.17
Share Price: \$561.020; Next Dividend Payable 02/2014								
AUTOMATIC DATA PROCESSING INC (ADP)	9/13/04	146,000	37.487	5,473.10	11,796.65	6,323.55 LT	280.32	2.37
Share Price: \$80.799; Next Dividend Payable 01/01/14								
BB & T CORP (BBT)	7/19/01	170,000	36.700	6,239.00	6,344.40	105.40 LT		
	2/15/07	40,000	43.838	1,753.50	1,492.80	(260.70) LT		
Total		210,000		7,992.50	7,837.20	(155.30) LT	193.20	2.46
Share Price: \$37.320; Next Dividend Payable 03/2014								
BERKSHIRE HATHAWAY CL-B NEW (BRKB)	12/17/99	100,000	35.000	3,500.00	11,856.00	8,356.00 LT	—	—
Share Price: \$118.560								
CARNIVAL CP NEW PAIRED COM (CCL)	3/23/00	220,000	24.813	5,458.76	8,837.40	3,378.64 LT	220.00	2.48
Share Price: \$40.170; Next Dividend Payable 03/2014								
CISCO SYS INC (CSCO)	3/6/01	140,000	24.202	3,388.29	3,140.20	(248.09) LT		
	10/15/04	250,000	18.659	4,664.75	5,607.50	942.75 LT		
Total		390,000		8,053.04	8,747.70	694.66 LT	265.20	3.03
Share Price: \$22.430; Next Dividend Payable 01/2014								
COCA COLA CO (KO)	10/16/08	160,000	22.190	3,550.40	6,609.60	3,059.20 LT	179.20	2.71
Share Price: \$41.310; Next Dividend Payable 03/2014								
CORPORATE EXEC BOARD CO (CEB)	10/19/07	47,000	76.010	3,572.47	3,639.21	66.74 LT		
	3/20/08	110,000	40.076	4,408.36	8,517.30	4,108.94 LT		
Total		157,000		7,980.83	12,156.51	4,175.68 LT	141.30	1.16
Share Price: \$77.430; Next Dividend Payable 03/2014								
EBAY INC (EBAY)	10/19/07	150,000	36.918	5,537.63	8,229.75	2,692.12 LT	—	—
Share Price: \$54.865								
FASTENAL CO (FAST)	10/16/08	192,000	18.168	3,488.34	9,121.92	5,633.58 LT	192.00	2.10
Share Price: \$47.510; Next Dividend Payable 02/2014								



Morgan Stanley

AMY & MARK SHIRVAN FAMILY
FOUNDATION INC

Portfolio Management Basic Securities Account
944-107487-042

Account Detail

STOCKS

COMMON STOCKS (CONTINUED)

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
FRANKLIN ELECTRIC CO (FELE)								
Share Price: \$44.640; Next Dividend Payable 02/20/14	7/30/97	275.000	6.406	1,761.72	12,276.00	10,514.28 LT	85.25	0.69
GENERAL ELECTRIC CO (GE)								
3/14/01		95.000	42.020	3,991.90	2,662.85	(1,329.05) LT		
12/23/03		65.000	30.950	2,011.75	1,821.95	(189.80) LT		
10/15/04		75.000	33.460	2,509.50	2,102.25	(407.25) LT		
2/15/07		90.000	36.145	3,253.08	2,522.70	(730.38) LT		
Total		325.000		11,766.23	9,109.75	(2,656.48) LT	286.00	3.13
Share Price: \$28.030; Next Dividend Payable 01/27/14								
HARLEY DAVIDSON INC (HOG)								
12/22/03		130.000	46.844	6,089.71	9,001.20	2,911.49 LT		
2/15/07		20.000	68.826	1,376.52	1,384.80	8.28 LT		
Total		150.000		7,466.23	10,386.00	2,919.77 LT	126.00	1.21
Share Price: \$69.240; Next Dividend Payable 03/20/14								
HOME DEPOT INC (HD)								
10/16/00		89.000	37.293	3,319.10	7,328.26	4,009.16 LT		
12/23/03		57.000	34.550	1,969.35	4,693.38	2,724.03 LT		
Total		146.000		5,288.45	12,021.64	6,733.19 LT	227.76	1.89
Share Price: \$82.340; Next Dividend Payable 03/20/14								
INTL BUSINESS MACHINES CORP (IBM)								
10/21/99		41.000	91.688	3,759.19	7,690.37	3,931.18 LT		
12/8/04		14.000	97.040	1,358.56	2,625.98	1,267.42 LT		
Total		55.000		5,117.75	10,316.35	5,198.60 LT	209.00	2.02
Share Price: \$187.570; Next Dividend Payable 03/20/14								
JOHNSON & JOHNSON (JNJ)								
3/14/01		100.000	46.935	4,693.50	9,159.00	4,465.50 LT		
2/15/07		50.000	65.781	3,289.04	4,579.50	1,290.46 LT		
Total		150.000		7,982.54	13,738.50	5,755.96 LT	396.00	2.88
Share Price: \$91.590; Next Dividend Payable 03/20/14								
PFIZER INC (PFE)								
2/8/02		186.000	39.900	7,421.40	5,697.18	(1,724.22) LT		
12/23/03		59.000	34.310	2,024.29	1,807.17	(217.12) LT		
2/15/07		150.000	26.522	3,978.23	4,594.50	616.27 LT		
Total		395.000		13,423.92	12,098.85	(1,325.07) LT	410.80	3.39
Share Price: \$30.630; Next Dividend Payable 03/20/14								
SCHLUMBERGER LTD (SLB)								
12/19/12		29.000	70.964	2,057.97	2,613.19	555.22 LT		
12/9/13		46.000	88.340	4,063.64	4,145.06	81.42 ST		
Total		75.000		6,121.61	6,758.25	555.22 LT	93.75	1.38
Share Price: \$90.110; Next Dividend Payable 01/10/14								
STRYKER CORP (SYK)								
10/19/07		75.000	73.340	5,500.50	5,635.50	135.00 LT	91.50	1.62
Share Price: \$75.140; Next Dividend Payable 01/31/14								
Total						81.42 ST		

Portfolio Management Basic Securities Account
944-107487-042

AMY & MARK SHIRVAN FAMILY
FOUNDATION INC

Account Detail

STOCKS

COMMON STOCKS (CONTINUED)

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
TARGET CORPORATION (TGT)	2/15/07	165,000	62.696	10,344.86	10,439.55	94.69 LT	283.80	2.71
Share Price: \$63.270; Next Dividend Payable 03/20/14								
TELEFLEX INC (TFX)	9/8/97	120,000	31.313	3,757.50	11,263.20	7,505.70 LT 1	163.20	1.44
Share Price: \$93.860; Next Dividend Payable 03/20/14								
TJX COS INC NEW (TJX)	7/8/02	260,000	9.890	2,571.40	16,569.80	13,998.40 LT	150.80	0.91
Share Price: \$63.730; Next Dividend Payable 03/20/14								
VALSPAR CORP (VAL)	10/20/99	184,000	16.156	2,972.75	13,117.36	10,144.61 LT	191.36	1.45
Share Price: \$71.290; Next Dividend Payable 03/20/14								
WALGREEN CO (WAG)	10/19/07	145,000	38.020	5,512.90	8,328.80	2,815.90 LT	182.70	2.19
Share Price: \$57.440; Next Dividend Payable 03/20/14								
TOTAL				\$161,656.85	\$278,633.12	\$116,255.45 LT	\$5,373.62	1.93%
						\$720.82 ST	\$0.00	

MUTUAL FUNDS

OTHER MUTUAL FUNDS

"Total Purchases vs Market Value" is provided to assist you in comparing your "Total Purchases," excluding reinvested distributions, with the current value of the mutual fund positions in your account

"Cumulative Cash Distributions" when shown, may reflect distributions on shares no longer held in the account. It may not reflect all distributions received in cash, due to but not limited to the following investments made prior to addition of this information on statements, securities transfers, timing of recent distributions, and certain adjustments made in your account

"Net Value Increase/ (Decrease)" reflects the difference between your total purchases, and the sum of the current value of the fund's shares, and cash distributions shown. This calculation is for informational purposes only and does not reflect your total unrealized gain or loss nor should it be used for tax purposes

Consulting Group Investment Advisor Research (CG IAR) status codes (FL, AL or NL) may be shown for certain mutual funds. Please refer to "CG IAR Statuses in Investment Advisory Programs" in the quarter-end statement (or your first statement, if you have not yet received a statement at the quarter-end) for a description of these status codes. All status codes represent the opinions of CG IAR and are not representations or guarantees of performance

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
AMERICAN EUROPACIFIC GRW F2 (AEPFX)	11/6/09	289.013	\$38.061	\$11,000.00	\$14,155.86	\$3,155.86 LT		
Purchases		289.013		11,000.00	14,155.86	3,155.86 LT		
Long Term Reinvestments		19.865		772.61	972.99	200.38 LT		
Short Term Reinvestments		3.673		177.45	179.90	2.45 ST		
Total		312.551		11,950.06	15,308.75	3,356.24 LT	179.00	1.16
						2.45 ST		



Morgan Stanley

CLIENT STATEMENT | For the Period December 1-31, 2013

Portfolio Management Basic Securities Account
944-107487-042

AMY & MARK SHIRVAN FAMILY
FOUNDATION INC

Account Detail

MUTUAL FUNDS

OTHER MUTUAL FUNDS (CONTINUED)

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
Total Purchases vs Market Value								
Net Value Increase/(Decrease)				11,000.00	15,308.75			
Share Price: \$48.980; Enrolled In MS Dividend Reinvestment; Capital Gains Reinvest								
HENDERSON INTL OPPORT I (HFOIX)								
	11/6/09	251.636	19.870	5,000.00	6,791.65	1,791.65 LT		
	12/19/12	271.244	21.520	5,837.18	7,320.87	1,483.69 LT		
Purchases		522.880		10,837.18	14,112.52	3,275.34 LT		
		11.429		231.50	308.46	76.96 LT		
		3.000		80.63	80.97	0.34 ST		
Long Term Reinvestments								
Short Term Reinvestments								
Total		537.309		11,149.31	14,501.97	3,352.30 LT	81.00	0.55
						0.34 ST		
Total Purchases vs Market Value								
Net Value Increase/(Decrease)				10,837.18	14,501.97			
Share Price: \$26.990; CG IAR Status: FL; Enrolled In MS Dividend Reinvestment; Capital Gains Reinvest								
THORNBURG INTL VALUE I (TGVIX)								
	11/6/09	199.362	25.080	5,000.00	6,391.54	1,391.54 LT		
	12/19/12	195.679	28.230	5,524.03	6,273.46	749.43 LT		
Purchases		395.041		10,524.03	12,665.00	2,140.97 LT		
		7.937		206.92	254.46	47.54 LT		
		5.795		166.16	185.78	19.62 ST		
Long Term Reinvestments								
Short Term Reinvestments								
Total		408.773		10,897.11	13,105.26	2,188.51 LT	168.00	1.28
						19.62 ST		
Total Purchases vs Market Value								
Net Value Increase/(Decrease)				10,524.03	13,105.26			
Share Price: \$32.060; CG IAR Status: FL; Enrolled In MS Dividend Reinvestment; Capital Gains Reinvest								
MUTUAL FUNDS								
		Percentage of Assets %		Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Yield %
		13.1%		\$33,996.48	\$42,915.98	\$8,897.05 LT	\$428.00	1.00%
						\$22.41 ST	\$0.00	

Transactions in mutual fund positions held directly at the Fund Company are not included in the total above and are not reflected on the Summary Page.
For more information about the pricing of Money Market Funds, please see the Expanded Disclosures.