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Form 990-PF

Return of Private Foundation

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

- Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.
- Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

2013

Open to Public
Inspection

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

Name of foundation JEFFREY I SIMONS FOUNDATION INC		A Employer identification number 22-3770537							
Number and street (or P O box number if mail is not delivered to street address) 4799 SANCTUARY LANE		B Telephone number (see instructions) (212) 741-3600							
C If exemption application is pending, check here ► <input type="checkbox"/>									
D 1. Foreign organizations, check here ► <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>									
E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>									
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>									
G Check all that apply <table border="0"> <tr> <td><input type="checkbox"/> Initial return</td> <td><input type="checkbox"/> Initial return of a former public charity</td> </tr> <tr> <td><input type="checkbox"/> Final return</td> <td><input type="checkbox"/> Amended return</td> </tr> <tr> <td><input type="checkbox"/> Address change</td> <td><input type="checkbox"/> Name change</td> </tr> </table>		<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity	<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return	<input type="checkbox"/> Address change	<input type="checkbox"/> Name change		
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H Check type of organization <table border="0"> <tr> <td><input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation</td> <td><input type="checkbox"/> Other taxable private foundation</td> </tr> <tr> <td><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust</td> <td><input type="checkbox"/> Other taxable private foundation</td> </tr> </table>				<input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation	<input type="checkbox"/> Other taxable private foundation	<input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust	<input type="checkbox"/> Other taxable private foundation		
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I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ 957,027		J Accounting method <table border="0"> <tr> <td><input checked="" type="checkbox"/> Cash</td> <td><input type="checkbox"/> Accrual</td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Other (specify) _____</td> </tr> </table>		<input checked="" type="checkbox"/> Cash	<input type="checkbox"/> Accrual	<input type="checkbox"/> Other (specify) _____			
<input checked="" type="checkbox"/> Cash	<input type="checkbox"/> Accrual								
<input type="checkbox"/> Other (specify) _____									
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						
1 Contributions, gifts, grants, etc, received (attach schedule)		49,956							
2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B									
3 Interest on savings and temporary cash investments									
4 Dividends and interest from securities.		22,349	22,349						
5a Gross rents									
b Net rental income or (loss) _____									
6a Net gain or (loss) from sale of assets not on line 10									
b Gross sales price for all assets on line 6a									
7 Capital gain net income (from Part IV, line 2) . . .			62,073						
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)		7,348	7,348						
11 Other income (attach schedule)									
12 Total. Add lines 1 through 11		72,305	84,422						
13 Compensation of officers, directors, trustees, etc									
14 Other employee salaries and wages									
15 Pension plans, employee benefits									
16a Legal fees (attach schedule)									
b Accounting fees (attach schedule)									
c Other professional fees (attach schedule)		7,348	7,348						
17 Interest									
18 Taxes (attach schedule) (see instructions)		198	198						
19 Depreciation (attach schedule) and depletion . . .									
20 Occupancy									
21 Travel, conferences, and meetings									
22 Printing and publications									
23 Other expenses (attach schedule)									
24 Total operating and administrative expenses.									
Add lines 13 through 23		7,546	7,546						
25 Contributions, gifts, grants paid		40,100	40,100						
26 Total expenses and disbursements. Add lines 24 and 25		47,646	7,546						
27 Subtract line 26 from line 12									
a Excess of revenue over expenses and disbursements		24,659							
b Net investment income (if negative, enter -0-) . . .			76,876						
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		64,443	119,707	119,707
	3 Accounts receivable ►				
	Less allowance for doubtful accounts ►				
	4 Pledges receivable ►				
	Less allowance for doubtful accounts ►				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7 Other notes and loans receivable (attach schedule) ►				
	Less allowance for doubtful accounts ►				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments—U S and state government obligations (attach schedule)				
	b Investments—corporate stock (attach schedule)		507,449	594,627	753,757
	c Investments—corporate bonds (attach schedule)		138,658	82,948	83,563
	11 Investments—land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach schedule) ►				
	12 Investments—mortgage loans				
	13 Investments—other (attach schedule)				
	14 Land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach schedule) ►				
	15 Other assets (describe ►)				
	16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)		710,550	797,282	957,027
Liabilities	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe ►)				
	23 Total liabilities (add lines 17 through 22)		0		
Net Assets or Fund Balances	24 Foundations that follow SFAS 117, check here ► <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
	25 Unrestricted				
	26 Temporarily restricted				
	27 Permanently restricted				
	28 Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/>				
	and complete lines 27 through 31.				
	29 Capital stock, trust principal, or current funds				
	30 Paid-in or capital surplus, or land, bldg , and equipment fund				
	31 Retained earnings, accumulated income, endowment, or other funds		710,550	797,282	
	30 Total net assets or fund balances (see page 17 of the instructions)		710,550	797,282	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)		710,550	797,282	

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	710,550
2	Enter amount from Part I, line 27a	2	24,659
3	Other increases not included in line 2 (itemize) ►	3	62,073
4	Add lines 1, 2, and 3	4	797,282
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	797,282

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.)
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1a See Additional Data Table

b

c

d

e

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

b

c

d

e

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

(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any
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a See Additional Data Table

b

c

d

e

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	62,073
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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	-16,780
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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	39,677	684,685	0 057949
2011	35,854	710,623	0 050454
2010	40,954	676,205	0 060564
2009	26,480	683,950	0 038716
2008	29,650	646,110	0 045890

2 Total of line 1, column (d).	2 0 253573
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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 050715
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4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4 774,600
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5 Multiply line 4 by line 3.	5 39,284
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6 Enter 1% of net investment income (1% of Part I, line 27b).	6 769
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7 Add lines 5 and 6.	7 40,053
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8 Enter qualifying distributions from Part XII, line 4.	8 40,100
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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 VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input checked="" type="checkbox"/> and enter "N/A" on line 1		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		1	769
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> 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	769
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5	769
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	
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	
8	Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	769
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 <input checked="" type="checkbox"/> 0 Refunded <input checked="" type="checkbox"/> 11	11	

Part VII-A Statements Regarding Activities

		Yes	No
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	No
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b	No
<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>			
c	Did the foundation file Form 1120-POL for this year?	1c	No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input checked="" type="checkbox"/> \$ _____ (2) On foundation managers <input checked="" type="checkbox"/> \$ _____		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ _____		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2	No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5	No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/>		
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	Yes

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).	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> 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)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

Website address ► N/A

14 The books are in care of ► JEFFREY SIMONS Telephone no ► (212) 741-3600
 Located at ► 4799 SANCTUARY LANE BOCA RATON FL ZIP +4 ► 33431

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here ► 15 and enter the amount of tax-exempt interest received or accrued during the year ►

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? 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.

1a	During the year did the foundation (either directly or indirectly)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	1b
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	1c
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	If "Yes," list the years ► 20____, 20____, 20____, 20____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	2b
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	3b
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	4a
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	4b

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JEFFREY SIMONS 4799 SANCTUARY DRIVE BOCA RATO, FL 33431	PRESIDENT 2 00	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.				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		

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

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 786,396
b	Average of monthly cash balances.	1b 0
c	Fair market value of all other assets (see instructions).	1c 0
d	Total (add lines 1a, b, and c).	1d 786,396
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.	3 786,396
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4 11,796
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5 774,600
6	Minimum investment return. Enter 5% of line 5.	6 38,730

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 38,730
2a	Tax on investment income for 2013 from Part VI, line 5.	2a 769
b	Income tax for 2013 (This does not include the tax from Part VI).	2b
c	Add lines 2a and 2b.	2c 769
3	Distributable amount before adjustments Subtract line 2c from line 1.	3 37,961
4	Recoveries of amounts treated as qualifying distributions.	4
5	Add lines 3 and 4.	5 37,961
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 37,961

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 40,100
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 40,100
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).	5 769
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6 39,331

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				37,961
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			34,036	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.	36,480			
c From 2010.	41,170			
d From 2011.	36,200			
e From 2012.	39,875			
f Total of lines 3a through e.	153,725			
4 Qualifying distributions for 2013 from Part XII, line 4 ► \$ _____ 40,100				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2013 distributable amount.				
e Remaining amount distributed out of corpus	40,100			
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	193,825			
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			34,036	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				37,961
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	193,825			
10 Analysis of line 9				
a Excess from 2009.	36,480			
b Excess from 2010.	41,170			
c Excess from 2011.	36,200			
d Excess from 2012.	39,875			
e Excess from 2013.	40,100			

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.			
1b	Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 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.			
2b	85% of line 2a.			
2c	Qualifying distributions from Part XII, line 4 for each year listed.			
2d	Amounts included in line 2c not used directly for active conduct of exempt activities.			
2e	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))

JEFFREY SIMONS

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

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

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

a The name, address, and telephone number of the person to whom applications should be addressed

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

c Any submission deadlines

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			► 3a	40,100
b Approved for future payment				
Total			► 3b	

Part XVI-A Analysis of Income-Producing Activities

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.					
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					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory.					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e).					
13 Total. Add line 12, columns (b), (d), and (e).					13 _____
(See worksheet in line 13 instructions to verify calculations)					

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

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

(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.)
70SH ASTRA ZENECA	P	2013-04-16	2013-06-13
25SH AGRIM INC	P	2013-01-03	2013-05-10
10SH AGRIM INC	P	2013-01-02	2013-06-13
85SH AGRIM INC	P	2013-01-03	2013-06-13
40SH AGRIM INC	P	2013-06-27	2013-08-01
90SH AGRIM INC	P	2013-01-02	2013-08-01
190SH AGRIM INC	P	2013-04-16	2013-08-01
60SH BUNGE LTD	P	2013-04-16	2013-05-10
80SH BCE INC	P	2013-04-22	2013-05-10
315SH CONAGRA FOODS	P	2013-11-15	2013-12-02
735SH CONAGRA FOODS	P	2013-08-02	2013-12-02
400SH EL PASO ELECTRIC	P	2012-07-11	2013-02-21
200SH EL PASO ELECTRIC	P	2012-07-11	2013-02-22
100SH EL PASO ELECTRIC	P	2012-07-11	2013-02-25
100SH GOLDCORP	P	2013-06-28	2013-12-02
115SH GOLDCORP	P	2013-10-30	2013-12-02
285SH GOLDCORP	P	2013-11-14	2013-12-02
290SH GOLDCORP	P	2013-10-22	2013-12-02
330SH GOLDCORP	P	2013-06-13	2013-12-02
560SH GOLDCORP	P	2013-05-10	2013-12-02
980SH GANNETT CO	P	2012-06-26	2013-06-13
95SH GANNETT CO	P	2013-10-30	2013-11-08
1280SH ISHARES GOLD	P	2012-09-04	2013-04-15
180SH MICROSOFT	P	2012-10-16	2013-04-26
20SH MIRCROSOFT	P	2012-10-16	2013-05-10
40SH NEWMONT MINING CORP	P	2012-11-06	2013-04-15
560SH NEWMONT MINING CORP	P	2012-05-24	2013-04-15
95SH PFIZER	P	2013-11-12	2013-12-30
225SH PFIZER	P	2013-10-30	2013-12-30
100SH PINNACLE WEST	P	2012-09-14	2013-06-21

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

(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.)
110SH PINNACLE WEST	P	2012-09-17	2013-06-21
200SH PINNACLE WEST	P	2012-09-13	2013-06-21
220SH PINNACLE WEST	P	2013-04-16	2013-06-21
150SH POTASH CORP	P	2013-04-18	2013-06-25
190SH POTACH CORP	P	2012-11-06	2013-06-25
70SH WALGREEN CO	P	2012-10-16	2013-05-10
90SH WALGREEN CO	P	2012-06-25	2013-05-10
50SH WALGREEN CO	P	2012-06-25	2013-06-13
135SH WALGREEN CO	P	2013-07-02	2013-09-25
15SH WALGREEN CO	P	2013-10-30	2013-12-04
10000 WASTE MANAGEMENT INC	P	2013-04-22	2013-10-29
15000 GOLDMAN SACHS	P	2012-11-29	2013-10-29
5000 CITGROUP INC	P	2013-10-28	2013-10-29
1000 REGENCY ENERGY PARTNERS	P	2012-09-27	2013-07-30
95SH CANADIAN PACIFIC	P	2012-01-03	2013-04-30
40SH CANADIAN PACIFIC	P	2012-01-03	2013-11-05
105SH CANADIAN PACIFIC	P	2012-01-03	2013-11-08
20SH EOG RES	P	2012-02-21	2013-04-17
40SH EOG RES	P	2011-07-13	2013-04-17
60SH EOG RES	P	2011-03-01	2013-04-17
140SH EOG RES	P	2011-10-14	2013-04-17
16SH GOOGLE INC	P	2012-09-21	2013-10-21
5SH GOOGLE INC	P	2012-11-06	2013-11-12
9SH GOOGLE INC	P	2012-09-21	2013-11-12
660SH GANNETT CO	P	2012-06-26	2013-11-08
250SH HOME DEPOT	P	2012-11-07	2013-11-08
10SH MEDTRONIC INC	P	2011-06-01	2013-05-10
140SH MEDTRONIC INC	P	2012-02-21	2013-05-10
60SH MEDTRONIC INC	P	2012-02-21	2013-06-13
80SH MICROSOFT INC	P	2011-10-14	2013-05-10

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

(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)
80SH MICROSOFT INC	P	2011-10-14	2013-06-13
170SH PFIZER INC	P	2012-05-10	2013-06-13
40SH POTASH CORP	P	2011-04-15	2013-05-10
110SH POTASH CORP	P	2011-10-14	2013-05-10
100SH POTASH CORP	P	2011-12-05	2013-06-25
140SH POTASH CORP	P	2011-10-14	2013-06-25
140SH POTASH CORP	P	2012-02-21	2013-06-25
90SH SANDISK CORP	P	2012-04-20	2013-05-10
115SH SANDISK CORP	P	2012-04-20	2013-09-25
110SH SEMPRA ENERGY	P	2011-10-14	2013-11-08
220SH SEMPRA ENERGY	P	2011-01-10	2013-11-08
210SH WALGREEN CORP	P	2012-06-25	2013-09-25
215SH WALGREEN CORP	P	2012-06-25	2013-10-21
245SH WALGREEN CORP	P	2012-06-25	2013-12-04
10000 BANK OF AMERICA SECURED NOTES	P	2011-06-21	2013-08-19
15000 JP MORGAN SECURED NOTES	P	2011-06-29	2013-10-29
5000 CATERPILLAR INC	P	2008-12-02	2013-10-29
5000 BALL CORP	P	2010-06-03	2013-06-21
10000 EQUINOX SENIOR NOTES	P	2010-07-14	2013-04-04
3000 HANES BRANDS SENIOR NOTES	P	2010-06-03	2013-12-16
4000 HUNTSMAN SENIOR NOTES	P	2011-06-02	2013-03-04
4000 REGENCY PARTNERS SENIOR NOTES	P	2012-09-27	2013-10-29
5000 SIMON PROPERTY GROUP	P	2010-06-08	2013-03-15

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
3,570	0	3,569	1
2,300	0	2,586	-286
891	0	1,026	-135
7,573	0	8,792	-1,219
3,338	0	3,462	-124
7,511	0	9,231	-1,720
15,857	0	17,621	-1,764
4,334	0	3,986	348
3,775	0	3,672	103
10,355	0	10,334	21
24,162	0	27,046	-2,884
13,242	0	13,551	-309
6,631	0	6,775	-144
3,306	0	3,388	-82
2,140	0	2,294	-154
2,462	0	3,062	-600
6,100	0	6,951	-851
6,207	0	7,496	-1,289
7,064	0	9,211	-2,147
11,987	0	16,316	-4,329
24,079	0	13,577	10,502
2,601	0	2,634	-33
17,381	0	21,129	-3,748
5,713	0	5,318	395
652	0	591	61
1,374	0	1,933	-559
19,237	0	27,585	-8,348
2,914	0	2,992	-78
6,901	0	6,955	-54
5,239	0	5,347	-108

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
5,763	0	5,841	-78
10,478	0	10,654	-176
11,526	0	12,950	-1,424
5,722	0	5,766	-44
7,248	0	7,700	-452
3,394	0	2,549	845
4,363	0	2,609	1,754
2,477	0	1,449	1,028
7,433	0	5,990	1,443
869	0	892	-23
10,362	0	10,489	-127
14,993	0	15,000	-7
5,282	0	5,285	-3
1,018	0	1,000	18
11,728	0	6,512	5,216
5,819	0	2,742	3,077
15,267	0	7,198	8,069
2,281	0	2,305	-24
4,562	0	3,984	578
6,844	0	6,640	204
15,969	0	11,535	4,434
16,071	0	11,739	4,332
5,048	0	3,395	1,653
9,086	0	6,603	2,483
18,070	0	9,144	8,926
18,831	0	15,544	3,287
489	0	405	84
6,852	0	5,468	1,384
3,132	0	2,343	789
2,608	0	2,184	424

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
2,776	0	2,184	592
4,902	0	3,867	1,035
1,724	0	2,234	-510
4,741	0	5,467	-726
3,815	0	4,258	-443
5,341	0	6,958	-1,617
5,341	0	6,596	-1,255
5,186	0	3,175	2,011
6,963	0	4,057	2,906
9,775	0	5,722	4,053
19,550	0	11,304	8,246
11,562	0	6,087	5,475
12,556	0	6,232	6,324
14,191	0	7,102	7,089
10,074	0	10,027	47
15,050	0	15,005	45
5,038	0	4,999	39
5,242	0	5,070	172
11,079	0	10,350	729
3,120	0	3,059	61
4,000	0	3,990	10
3,982	0	4,000	-18
5,000	0	5,328	-328

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

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	
0	0	0	1
0	0	0	-286
0	0	0	-135
0	0	0	-1,219
0	0	0	-124
0	0	0	-1,720
0	0	0	-1,764
0	0	0	348
0	0	0	103
0	0	0	21
0	0	0	-2,884
0	0	0	-309
0	0	0	-144
0	0	0	-82
0	0	0	-154
0	0	0	-600
0	0	0	-851
0	0	0	-1,289
0	0	0	-2,147
0	0	0	-4,329
0	0	0	10,502
0	0	0	-33
0	0	0	-3,748
0	0	0	395
0	0	0	61
0	0	0	-559
0	0	0	-8,348
0	0	0	-78
0	0	0	-54
0	0	0	-108

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

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	
0	0	0	-78
0	0	0	-176
0	0	0	-1,424
0	0	0	-44
0	0	0	-452
0	0	0	845
0	0	0	1,754
0	0	0	1,028
0	0	0	1,443
0	0	0	-23
0	0	0	-127
0	0	0	-7
0	0	0	-3
0	0	0	18
0	0	0	5,216
0	0	0	3,077
0	0	0	8,069
0	0	0	-24
0	0	0	578
0	0	0	204
0	0	0	4,434
0	0	0	4,332
0	0	0	1,653
0	0	0	2,483
0	0	0	8,926
0	0	0	3,287
0	0	0	84
0	0	0	1,384
0	0	0	789
0	0	0	424

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
0	0	0	592
0	0	0	1,035
0	0	0	-510
0	0	0	-726
0	0	0	-443
0	0	0	-1,617
0	0	0	-1,255
0	0	0	2,011
0	0	0	2,906
0	0	0	4,053
0	0	0	8,246
0	0	0	5,475
0	0	0	6,324
0	0	0	7,089
0	0	0	47
0	0	0	45
0	0	0	39
0	0	0	172
0	0	0	729
0	0	0	61
0	0	0	10
0	0	0	-18
0	0	0	-328

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				
UNIVERSITY OF SCRANTON 800 LINDEN ST SCRANTON, PA 18510		-	EDUCATION	5,000
BECKER COLLEGE 61 SEVER ST WORCESTER, MA 01609		-	EDUCATION	5,000
GRAMEEN FOUNDATION 110 15TH ST NW WASHINGTON, DC 20005		-	HUMANITARIAN	500
WPBT 2 PO BOX 610002 MIAMI, FL 33261		-	PUBLIC	500
WNYC NY PUBLIC RADIO PO BOX 1550 NEW YORK, NY 10116		-	PUBLIC	200
WILLIAM PATERSON UNIVERSITY 300 POMPTON ROAD WAYNE, NJ 07470		-	EDUCATION	500
CHILDREN AID SOCIETY 105 EAST 22ND STREET NEW YORK, NY 10010		-	HUMANITARIAN	500
IN CRUISE WE TRUST 1701 NE 2ND AVE DELRAY BEACH, FL 33444		-	MEDICAL	200
CENTER FOR FOOD ACTION 192 WEST DEMAREST AVE ENGLEWOOD, NJ 07631		-	HUMANITARIAN	2,000
SAVE THE CHILDREN 54 WILTON ROAD WESTPORT, CT 06880		-	HUMANITARIAN	5,000
CHILDRENS AID FAMILY SERVICES 200 ROBIN ROAD PARAMUS, NJ 07652		-	HUMANITARIAN	500
CENTRAL ROTARY CLUB OF BOCA DISTRICT 6930 BOCA RATON, FL 33431		-	HUMANITARIAN	1,000
PANCREATIC CANCER ACTION 1500 ROSECRANS AVE MANHATTAN BEACH, CA 90266		-	MEDICAL RESEARCH	1,000
THIRTEEN 825 EIGHTH AVE NEW YORK, NY 10019		-	PUBLIC	1,100
DIRECT RELIEF 27 S LAPATERA LANE SANTA BARBARA, CA 93117		-	MEDICAL HUMANITARIAN	1,000
Total			► 3a	40,100

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				
MATHEW 25 MINISTRIES 11060 KENWOOD RD BLUE ASH, OH 45242		-	HUMANITARIAN	1,000
MAHWAH FIRE DEPARTMENT 475 CORPORATE DRIVE MAHWAH, NJ 07430		-	PUBLIC SAFETY	100
UNIVERSITY OF MASSACHUSETTS 37 MATHER DRIVE AMHERST, MA 01003		-	EDUCATION	5,000
WAUBONSEE COMMUNITY COLLEGE 47 WAUBONSEE DRIVE SUGAR GROVE, IL 60554		-	EDUCATION	5,000
MERCY COLLEGE 555 BROADWAY DOBBS FERRY, NY 10522		-	EDUCATION	5,000
Total			► 3a	40,100

TY 2013 Investments Corporate Bonds Schedule

Name: JEFFREY I SIMONS FOUNDATION INC

EIN: 22-3770537

Name of Bond	End of Year Book Value	End of Year Fair Market Value
ALCOA INC	5,463	5,327
BALL CORP	5,335	5,438
BUNGE LTD	5,361	5,280
CITIGROUP	5,285	5,261
ENBRIDGE INC	5,364	5,228
EQUINIX INC	5,263	4,975
GOLDMAN SACHS GROUP INC	9,913	10,007
HESS CORP	4,986	5,035
KINDER MORGAN	4,868	5,371
TIME WARNER CABLE INC	4,977	5,083
UNITED RENTALS NORTH AMERICA	5,460	5,344
VULCAN MATERIALS	5,022	5,600
WASTE MANAGEMENT	5,245	5,161
WESTERN UNION	5,099	5,117
WILLIS GROUP NA	5,307	5,336

TY 2013 Investments Corporate Stock Schedule

Name: JEFFREY I SIMONS FOUNDATION INC

EIN: 22-3770537

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AMEREN CORP	48,154	48,093
ASTRAZENECA	45,764	56,698
BCE INC	26,989	30,900
BUNGLE LTD	27,315	36,128
CABOT OIL AND GAS	20,867	40,504
GENERAL DYNAMICS	46,257	55,419
GREAT PLAINS ENERGY	36,542	41,814
HERTZ GLOBAL	44,731	52,947
MCDERMOTT INTL	43,865	53,036
MEDTRONIC	43,628	55,840
MICROSOFT	30,226	38,532
NEXTERA ENERGY	38,268	48,375
PFIZER	33,285	44,107
PITNEY BOWES	62,748	87,281
RANGE RESOURCES	36,287	44,684
SANDISK CORP	9,701	19,399

TY 2013 Other Increases Schedule

Name: JEFFREY I SIMONS FOUNDATION INC**EIN:** 22-3770537

Description	Amount
CAPITAL GAINS	62,073

TY 2013 Taxes Schedule

Name: JEFFREY I SIMONS FOUNDATION INC**EIN:** 22-3770537

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
990PF	198	198		

TY 2013 IRS Payment

Name: JEFFREY I SIMONS FOUNDATION INC

EIN: 22-3770537

Routing Transit Number:

Bank Account Number:

Type of Account: Checking

Payment Amount in Dollars and 769

Cents:

Requested Payment Date: 2014-05-02

Taxpayer's Daytime Phone Number: (212) 741-3600