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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2013

Open to Public Inspection

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

Name of foundation BLUE MOUNTAIN FOUNDATION		A Employer identification number 23-2586321	
Number and street (or P O box number if mail is not delivered to street address) 1242 MONROE AVENUE		B Telephone number (see instructions) (610) 376-1595	
City or town, state or province, country, and ZIP or foreign postal code WYOMISSING, PA 19610		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		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☐ \$ 829,797		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	5,972	5,972		
	4 Dividends and interest from securities.	12,671	12,671		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	50,721			
	b Gross sales price for all assets on line 6a 194,170				
	7 Capital gain net income (from Part IV , line 2) . . .		50,721		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	69,364	69,364		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	10,325	7,775		2,550
	c Other professional fees (attach schedule)	2,829	2,829		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	135	0		0
	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	13,289	10,604		2,550
	25 Contributions, gifts, grants paid	61,000			61,000
	26 Total expenses and disbursements. Add lines 24 and 25	74,289	10,604		63,550
	27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements		-4,925			
b Net investment income (if negative, enter -0-)			58,760		
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	16,735	17,016	17,016
	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)	106,632	 106,047	108,504
	b	Investments—corporate stock (attach schedule)	407,354	 403,267	619,046
	c	Investments—corporate bonds (attach schedule).	80,678	 80,144	85,231
	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)	611,399	606,474	829,797	
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	0	
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	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	611,399	606,474	
	30	Total net assets or fund balances (see page 17 of the instructions)	611,399	606,474	
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	611,399	606,474		

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	611,399
2	Enter amount from Part I, line 27a	2	-4,925
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	606,474
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	606,474

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	VARIOUS SECURITIES	P		
b	LONG TERM CAPITAL GAIN DISTRIBUTION	P		
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 193,216		143,449	49,767
b 954			954
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			49,767
b			954
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	50,721
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	49,135	762,907	0 064405
2011	38,803	752,084	0 051594
2010	87,127	731,164	0 119162
2009	44,548	682,673	0 065255
2008	41,049	754,128	0 054432

2 Total of line 1, column (d).	2	0 354848
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 070970
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	801,671
5 Multiply line 4 by line 3.	5	56,895
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	588
7 Add lines 5 and 6.	7	57,483
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	63,550

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 ☐ and enter "N/A" on line 1		1	588
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3 Add lines 1 and 2.		3	588
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	588
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	440	
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	440
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	148
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			
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
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?		1b	No
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?.		1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0 (2) On foundation managers \$ 0			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		2	No
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		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?		5	No
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?		6	Yes
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.		7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) PA			
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 .		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)? If "Yes," complete Part XIV		9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		10	No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of REINSEL KUNTZ LESHER LLP Telephone no (610) 376-1595 Located at 1330 BROADCASTING ROAD WYOMISSING PA ZIP+4 19610			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

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

Part VII-B

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

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

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
ANNE O MOLL	PRESIDENT	0	0	0
1330 BROADCASTING ROAD	1 00			
WYOMISSING,PA 19610				
THOMAS MOLL	VICE PRES	0	0	0
1330 BROADCASTING ROAD	1 00			
WYOMISSING,PA 19610				
THOMAS A BEAVER	TREASURER	0	0	0
1330 BROADCASTING ROAD	1 00			
WYOMISSING,PA 19610				
HAL LAVIN	SECRETARY	0	0	0
1330 BROADCASTING ROAD	1 00			
WYOMISSING,PA 19610				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

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

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	783,753
b	Average of monthly cash balances.	1b	30,126
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	813,879
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	813,879
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	12,208
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	801,671
6	Minimum investment return. Enter 5% of line 5.	6	40,084

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	40,084
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	588
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	588
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	39,496
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	39,496
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	39,496

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	63,550
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	63,550
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	588
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	62,962
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				39,496
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				37,274
d From 2011.				905
e From 2012.				11,820
f Total of lines 3a through e.	49,999			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 63,550				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				39,496
e Remaining amount distributed out of corpus	24,054			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	74,053			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	74,053			
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				37,274
c Excess from 2011. . . .				905
d Excess from 2012. . . .				11,820
e Excess from 2013. . . .				24,054

Part XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

1a

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

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

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

a

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

THOMAS A BEAVER CPA
1330 BROADCASTING ROAD
WYOMISSING, PA 19610
(610) 373-1565

b

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

WRITTEN

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

AT MANAGERS' DISCRETION

Form 990-PF (2013)

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	61,000
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

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				
ALBRIGHT COLLEGE 13TH BERN STREETS READING,PA 196125234	NONE	PUBLIC	FILM DEPARTMENT PROJECTS	1,500
AMERICAN RED CROSS 701 CENTRE AVENUE READING,PA 19601	NONE	PUBLIC	GENERAL FUNDGENERAL FUND	1,500
BERKS CATHOLIC HIGH SCHOOL 955 E WYOMISSING BOULEVARD READING,PA 19611	NONE	PUBLIC	GENERAL FUND	7,400
BERKS COUNTY ASSOCIATION FOR THE BLIND 2020 HAMPDEN BLVD READING,PA 19604	NONE	PUBLIC	GENERAL FUND	1,000
BERKS DEAF AND HARD OF HEARING SERVICES 2045 CENTRE AVENUE READING,PA 19601	NONE	PUBLIC	GENERAL FUND	1,000
BERKS ENCORE 40 NORTH NINTH STREET READING,PA 19601	NONE	PUBLIC	GENERAL FUND	1,000
BERKS TALKLINE PO BOX 13234 READING,PA 196123234	NONE	PUBLIC	GENERAL FUND	2,000
BERKS WOMEN IN CRISIS 50 N 4TH STREET READING,PA 19601	NONE	PUBLIC	GENERAL FUND	1,000
CO COUNTY WELLNESS SERVICES 429 WALNUT STREET READING,PA 196038626	NONE	PUBLIC	GENERAL FUNDGENERAL FUND	9,400
EASY DOES IT INC 1300 HILLTOP ROAD LEESPORT,PA 19533	NONE	PUBLIC	GENERAL FUND	1,000
HAWK MOUNTAIN COUNCIL BSA 5027 POTTSVILLE PIKE READING,PA 19605	NONE	PUBLIC	GENERAL FUND	1,000
JOHN PAUL II CENTER FOR SPECIAL LEARNING 1092 WELSH ROAD READING,PA 19607	NONE	PUBLIC	GENERAL FUND	1,500
LITERACY COUNCIL OF READING-BERKS 35 S DWIGHT STREET READING,PA 19609	NONE	PUBLIC	GENERAL FUND	500
OLIVET BOYS AND GIRLS CLUB OF READING & BERKS COUNTY 1161 PERSHING BLVD READING,PA 19611	NONE	PUBLIC	GENERAL FUND	1,500
OPPORTUNITY HOUSE 430 N 2ND STREET READING,PA 19601	NONE	PUBLIC	GENERAL FUND	1,000
Total  3a				61,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
PLANNED PARENTHOOD OF THE NORTHEAST AND MID-PENN 48 S 4TH STREET READING,PA 19602	NONE	PUBLIC	GENERAL FUND	1,000
POP CORN PARK REFUGE PO BOX 43 FORKED RIVER,NJ 087310043	NONE	PUBLIC	GENERAL FUND	2,000
READING MUSICAL FOUNDATION PO BOX 14835 READING,PA 196124835	NONE	PUBLIC	GENERAL FUND	700
RED CREEK WILDLIFE CENTER 30 MOONHILL DRIVE SCHUYLKILL HAVEN,PA 17972	NONE	PUBLIC	OPERATING EXPENSES	2,000
SALVATION ARMY 301 S 5TH STREET READING,PA 19602	NONE	PUBLIC	GENERAL FUND	3,000
SOUTH MOUNTAIN YMCA PO BOX 147 WERNERSVILLE,PA 19565	NONE	PUBLIC	GENERAL FUND	1,000
ST JOSEPH'S MEDICAL CENTER FOUNDATION PO BOX 316 READING,PA 196030316	NONE	PUBLIC	GENERAL FUND	1,500
TEEN CHALLENGE TRAINING CENTER INC PO BOX 98 REHRERSBURG,PA 19550	NONE	PUBLIC	GENERAL FUND	1,500
THE GREATER BERKS FOOD BANK 1011 TUCKERTON COURT READING,PA 19605	NONE	PUBLIC	GENERAL FUND	2,000
UNITED WAY OF BERKS COUNTY 501 WASHINGTON STREET READING,PA 196030702	NONE	PUBLIC	GENERAL FUND	1,000
WYOMISSING PUBLIC LIBRARY 9 READING BOULEVARD WYOMISSING,PA 19610	NONE	PUBLIC	GENERAL FUND	1,000
THE GREATER BERKS FOOD BANK 1011 TUCKERTON COURT READING,PA 19605	NONE	PUBLIC	CAPITAL CAMPAIGN	5,000
READING PUBLIC MUSEUM 500 MUSEUM ROAD READING,PA 19611	NONE	PUBLIC	OPERATING EXPENSES	1,000
CARON TREATMENT CENTER 243 N GALLEN ROAD WERNERSVILLE,PA 19565	NONE	PUBLIC	CAPITAL CAMPAIGN	5,000
GOGGLEWORKS CENTER FOR THE ARTS 201 WASHINGTON STREET READING,PA 19601	NONE	PUBLIC	OPERATING ACCOUNT	1,000
Total  3a				61,000

TY 2013 Accounting Fees Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REINSEL KUNTZ LESHER -TAX SERVICE	10,325	7,775		2,550

**TY 2013 Investments Corporate
Bonds Schedule****Name:** BLUE MOUNTAIN FOUNDATION**EIN:** 23-2586321

Name of Bond	End of Year Book Value	End of Year Fair Market Value
5,000 UNITS IBM DTD 9/14/07	5,173	5,741
15,000 UNITS SBC COMMUNICATIONS DTD 8/18/04	14,164	16,554
5,000 UNITS GLAXOSMITH CAP DTD 5/13/08	5,124	5,756
5,000 UNITS CONSOLIDATED EDISON DTD 4/1/08	5,167	5,782
5,000 UNITS COSTCO DTD 2/20/07	5,168	5,616
5,000 UNITS PEPSICO INC DTD 10/26/10 3.125% 11/01/2020	4,904	5,006
5,000 UNITS US BANCORP DTD 07/27/2010 2.45% 7/27/2015	5,033	5,141
5,000 SHS BANK OF NY MELLON BK DTD 9/23/11	5,064	5,116
5,000 SHS GENERAL ELECTRIC CAP CORP DTD 1/7/11 4.625%	5,221	5,452
5,000 UNITS MERCK & CO INC DTD 12/10/10 3.875%	4,909	5,274
5,000 UNITS OCCIDENTAL PETROLEUM CORP DTD 12/16/10	5,018	5,249
5,000 WELLS FARGO CO DTD 12/12/11 2.625% 12/15/2016	5,147	5,236
5,000 JP MORGAN CHASE & CO DTD 01/25/2013	5,007	4,740
5,000 WALMART STORES DTD 4/11/13	5,045	4,568

TY 2013 Investments Corporate
Stock Schedule

Name: BLUE MOUNTAIN FOUNDATION
EIN: 23-2586321

Name of Stock	End of Year Book Value	End of Year Fair Market Value
95 SHS A T & T	1,906	3,340
85 SHS EXXON MOBIL CORP	1,179	8,602
110 SHS JOHNSON & JOHNSON	5,133	10,075
334 SHS MICROSOFT CORP COM	8,382	12,495
180 SHS VF CORPORATION	1,727	11,221
1297.506 SHS CONESTOGA SMALL CAP	26,794	47,554
90 SHS AMGEN INC	4,950	10,267
65 SHS CHEVRON	4,897	8,119
290 SHS ORACLE CORP	5,189	11,095
120 SHS PEPSICO INC	7,237	9,953
95 SHS QUALCOMM INC	3,664	7,054
85 SHS UNITED TECHNOLOGIES	4,435	9,673
22 SHS APPLE	2,648	12,342
115 SHS MCCORMICK & COMPANY INC	4,018	7,926
92 SHS AMETEK INC	1,423	4,846
20 SHS FACTSET RESEARCH	1,120	2,172
40 SHS HARRIS CORP	1,818	2,792
45 SHS HORMEL FOODS	763	2,033
25 SHS L-3 COMMUNICATIONS HOLDINGS COM	1,697	2,671
40 SHS ROSS STORES	631	2,997
50 SHS TORO CO	928	3,180
25 SHS TUPPERWARE	560	2,363
210 SHS WALGREEN CO	4,981	12,062
55 SHS BROADRIDGE FINL SOL	674	2,174
95 SHS LABORATORY CRP	7,197	8,680
20 SHS HUBBELL INC	642	2,178
50 SHS INTERNATIONAL BUSINESS MACHINES	5,123	9,378
90 SHS C H ROBINSON WORLDWIDE	4,931	5,252
80 SHS MCKESSON HBOC INC COM	4,657	12,912
15 SHS PANERA BREAD COMPANY	1,102	2,650

Name of Stock	End of Year Book Value	End of Year Fair Market Value
38 SHS JOHN WILEY & SONS INC	1,667	2,098
35 SHS WORLD FUEL SERVICES CORP	1,003	1,511
50 SHS AMERICAN FINCL GROUP INC COM	1,299	2,886
1469.67 SHS ARTISAN INTERNATIONAL FD	32,336	44,796
6234.097 SHS GOLDMAN SACHS SATELLITE STRATEGIES	49,000	50,808
25 SHS ADVANCE AUTO PARTS INC	1,576	2,767
220 SHS TJX COMPANIES INC	5,586	14,021
35 SHS CHURCH & DWIGHT CO INC	1,441	2,320
175 SHS COLGATE PALMOLIVE CO INC	8,183	11,412
65 SHS COMMERCE BANCSHARES INC COM	2,350	2,924
225 SHS DISCOVER FINANCIAL SERVICES COM	6,040	12,589
50 SHS ARTHUR J GALLAGHER & CO	1,734	2,346
85 SHS BAXTER INTL INC COM	5,114	5,912
20 SHS WATSCO INC COM	1,456	1,921
40 SHS J2 GLOBAL INC	977	2,000
1743.119 SHS HENDERSON INTERNATIONAL OPPORTUNITIES FUND	33,181	47,047
35 SHS APTARGROUP INC.COM	1,812	2,373
180 SHS BALL CORP	6,448	9,299
40 SHS VALSPAR CORP	1,530	2,852
40 SHS VECTREN CORPORATION COM	1,124	1,420
80 SHS WISCONSIN ENERGY CORP COM	2,404	3,307
30 SHS CARTER'S INC	1,701	2,154
20 SHS OCEANEERING INTL INC	1,041	1,578
95 SHS RAYTHEON CO COM	5,371	8,616
255 SHS MARSH & MCLENNAN CO COM	8,753	12,332
305 SHS U S BANCORP COM	9,726	12,322
40 SHS WADDELL & REED FIN INC	1,757	2,605
45 SHS CHARLES RIVER LABS INTL IN	1,583	2,387
35 SHS OMNICARE INC COM	1,196	2,113
130 SHS CADENCE DESIGN SYSTEMS INC	1,678	1,823

Name of Stock	End of Year Book Value	End of Year Fair Market Value
65 SHS CORELOGIC INC COM	1,665	2,309
360 SHS INTEL CORP COM	9,292	9,344
20 SHS MINERALS TECHNOLOGIES INC	689	1,201
25 SHS BIG LOTS INC	966	807
30 SHS HANESBRANDS INC COM	1,519	2,108
210 SHS MACYS INC	8,905	11,214
200 SHS MATTEL INC COM	8,413	9,516
35 SHS REINSURANCE GROUP OF AMERICA	2,317	2,709
155 SHS TORCHMARK CORP COM	9,338	12,113
35 SHS UNITED THERAPEUTICS COPR	2,693	3,958
25 SHS PERRIGO CO PLC	3,805	3,836
65 SHS DELUXE CORPORATION COM	2,627	3,392
85 SHS DOVER CORP COM	7,651	8,206
50 SHS UNION PACIFIC CORP COM	6,864	8,400
415 SHS CISCO SYSTEMS INC	8,711	9,308
30 SHS ZEBRA TECHNOLOGIES CORP	1,347	1,622
130 SHS TE CONNECTIVITY LTD COM	5,845	7,164
30 SHS UGI CORP COM	1,147	1,244

TY 2013 Investments Government Obligations Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

US Government Securities - End of

Year Book Value:

106,047

US Government Securities - End of

Year Fair Market Value:

108,504

**State & Local Government
Securities - End of Year Book**

Value:

0

**State & Local Government
Securities - End of Year Fair**

Market Value:

0

TY 2013 Other Professional Fees Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK MANAGEMENT FEES	2,829	2,829		0

TY 2013 Taxes Schedule

Name: BLUE MOUNTAIN FOUNDATION

EIN: 23-2586321

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	135	0		0