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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 separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2013

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

For calendar year 2013 or tax year beginning

, and ending

Name of foundation

MAXWELL STRAWBRIDGE FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)

C/O COZEN O'CONNOR 1900 MARKET STREET

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

PHILADELPHIA, PA 19103

G Check all that apply:

☐

Initial return

☐

Initial return of a former public charity

☐

Final return

☐

Amended return

☐

Address change

☐

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

I Fair market value of all assets at end of year

(from Part II, col (c), line 16)

J Accounting method:

☒

Cash

☐

Accrual

Other (specify)

\$ 286,996. (Part I, column (d) must be on cash basis)

A Employer identification number

23-2703172

B Telephone number

(215) 665-3723

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐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))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

1 Contributions, gifts, grants, etc., received

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

8,744.

8,744.

STATEMENT 1

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

91,231.

b Gross sales price for all assets on line 6a 140,813.

7 Capital gain net income (from Part IV, line 2)

91,231.

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)

11 Other income

12 Total Add lines 1 through 11

99,975.

99,975.

13 Compensation of officers, directors, trustees, etc

0.

0.

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees STMT 2

5,000.

2,500.

2,500.

b Accounting fees STMT 3

2,985.

1,492.

1,493.

c Other professional fees

17 Interest

18 Taxes STMT 4

587.

0.

0.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses STMT 5

110.

55.

55.

24 Total operating and administrative expenses Add lines 13 through 23

8,682.

4,047.

4,048.

25 Contributions, gifts, grants paid

113,650.

113,650.

26 Total expenses and disbursements Add lines 24 and 25

122,332.

4,047.

117,698.

27 Subtract line 26 from line 12.

-22,357.

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

95,928.

c Adjusted net income (if negative, enter -0-)

N/A

323501
10-10-13

LHA For Paperwork Reduction Act Notice, see instructions

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	6,220.	33,985.	33,985.
	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			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock STMT 6	264,134.	214,552.	252,411.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ ESTIMATED TAXES)	1,140.	600.	600.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	271,494.	249,137.	286,996.	
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			
	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 ▶ <input type="checkbox"/>			
	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 ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	271,494.	249,137.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	0.	0.		
30 Total net assets or fund balances	271,494.	249,137.		
31 Total liabilities and net assets/fund balances	271,494.	249,137.		

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	271,494.
2 Enter amount from Part I, line 27a	2	-22,357.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	249,137.
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	249,137.

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				
b SEE ATTACHED STATEMENT				
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 140,813.		49,582.	91,231.	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e			91,231.	
2 Capital gain net income or (net capital loss)		2		91,231.
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). If (loss), enter -0- in Part I, line 8		3		N/A

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	281,550.	463,516.	.607422
2011	319,844.	647,040.	.494319
2010	365,930.	1,003,179.	.364770
2009	426,035.	1,240,758.	.343367
2008	632,878.	2,117,403.	.298894
2 Total of line 1, column (d)		2	2.108772
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	.421754
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5		4	303,946.
5 Multiply line 4 by line 3		5	128,190.
6 Enter 1% of net investment income (1% of Part I, line 27b)		6	959.
7 Add lines 5 and 6		7	129,149.
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	117,698.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b		1	1,919.
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	1,919.
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	1,919.
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	600.	
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	600.	
8 Enter any penalty for underpayment of estimated tax. Check here <input 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	1,319.	
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 type="checkbox"/> Refunded <input type="checkbox"/>	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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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		X
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. \$ 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? If "Yes," attach a detailed description of the activities		X
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
4a 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? If "Yes," attach the statement required by General Instruction T		X
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	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>PA</u>		
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)			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)			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		X	

Website address **N/A**

14 The books are in care of **THE FOUNDATION** Telephone no **(215) 665-3723**
 Located at **1900 MARKET STREET, PHILADELPHIA, PA** ZIP+4 **19103**

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** **N/A**

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 the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country **16** **X**

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?	<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 instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years N/A		2b
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.)	N/A	
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?	<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.)	N/A	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)?

☐ 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)?

N/A

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?

N/A

☐ 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

X

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?

N/A

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.

(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
EDWARD M. GLICKMAN 1900 MARKET STREET PHILADELPHIA, PA 19103	TRUSTEE 0.00	0.	0.	0.
CHARLES G. KOPP 1900 MARKET STREET PHILADELPHIA, PA 19103	TRUSTEE 0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

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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	278,060.
b	Average of monthly cash balances	1b	30,515.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	308,575.
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	308,575.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	4,629.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	303,946.
6	Minimum investment return Enter 5% of line 5	6	15,197.

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	15,197.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	1,919.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,919.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	13,278.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	13,278.
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	13,278.

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	117,698.
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	117,698.
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	5	0.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	117,698.

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.

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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				13,278.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013.				
a From 2008	531,908.			
b From 2009	364,757.			
c From 2010	316,233.			
d From 2011	289,744.			
e From 2012	259,548.			
f Total of lines 3a through e	1,762,190.			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$	117,698.			
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				13,278.
e Remaining amount distributed out of corpus	104,420.			
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	1,866,610.			
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 instr.			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)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	531,908.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	1,334,702.			
10 Analysis of line 9:				
a Excess from 2009	364,757.			
b Excess from 2010	316,233.			
c Excess from 2011	289,744.			
d Excess from 2012	259,548.			
e Excess from 2013	104,420.			

N/A

- b**
- Check box to indicate whether the foundation is a private operating foundation described in section
- ☐
- 4942(i)(3) or
- ☐
- 4942(i)(5)

- (4) Gross investment income

[illegible]

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 SCHEDULE ATTACHED	NONE	NONE		113,650.
Total				113,650.
b Approved for future payment				
NONE				
Total				0.



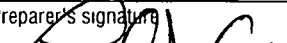
Part XVII	Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations
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		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 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	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	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
N/A		

Sign Here	Under penalties of perjury, I declare that I prepared 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.				May the IRS discuss this return with the preparer shown below (see instr.)? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	<div style="display: flex; justify-content: space-between;"> <div style="width: 40%;">  Signature of officer or trustee </div> <div style="width: 15%; text-align: center;"> Date 2/21/14 </div> <div style="width: 40%; text-align: center;">  Title </div> </div>					
Paid Preparer Use Only	Print/Type preparer's name Leonel J. Cozen		Preparer's signature 	Date 2/21/14	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶ COZEN O'CONNOR					Firm's EIN ▶ 23-1732832
	Firm's address ▶ 1900 MARKET STREET PHILADELPHIA, PA 19103-3508					Phone no 215-665-2000

MAXWELL STRAWBRIDGE FOUNDATION

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	225 SHS. PFIZER, INC.	P	03/12/92	01/23/13
b	250 SHS. UNITED TECHNOLOGIES CORP.	P	03/12/92	01/23/13
c	200 SHS. VERIZON INC	P	03/12/92	01/23/13
d	600 SHS. GENERAL ELECTRIC CO.	P	03/12/92	05/30/13
e	100 SHS. PEPSICO, INC.	P	08/03/94	05/30/13
f	300 SHS. PFIZER, INC.	P	03/12/92	05/30/13
g	200 SHS. VERIZON INC	P	03/12/92	05/30/13
h	250 SHS. SCHLUMBERGER, LTD.	P	03/12/92	10/23/13
i	350 SHS. INTEL CORP.	P	08/24/99	03/18/13
j	250 SHS. MICROSOFT CORP.	P	08/24/99	03/18/13
k	100 SHS. SCHLUMBERGER, LTD.	P	03/12/92	03/18/13
l	200 SHS. SCHLUMBERGER, LTD.	P	03/12/92	10/23/13
m				
n				
o				

(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 5,934.		866.	5,068.
b 21,856.		1,605.	20,251.
c 8,541.		3,787.	4,754.
d 14,154.		3,820.	10,334.
e 8,077.		1,423.	6,654.
f 8,443.		1,155.	7,288.
g 9,954.		3,786.	6,168.
h 23,194.		3,118.	20,076.
i 7,442.		14,774.	-7,332.
j 7,010.		11,506.	-4,496.
k 7,653.		1,247.	6,406.
l 18,555.		2,495.	16,060.
m			
n			
o			

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			5,068.
b			20,251.
c			4,754.
d			10,334.
e			6,654.
f			7,288.
g			6,168.
h			20,076.
i			-7,332.
j			-4,496.
k			6,406.
l			16,060.
m			
n			
o			

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	91,231.
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). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

Maxwell Strawbridge Foundation
EIN: 23-2703172
990-PF, Part XV, Line 3a

Grants & Contributions Paid

Name	Address	Relationship	Purpose	Amount
Alzheimer's Association	Philadelphia, PA	NONE	General Fund	\$ 500 00
American Associates Ben-Gurion University	Jenkintown, PA	NONE	General Fund	\$ 1,000 00
American Cancer Society	Philadelphia, PA	NONE	General Fund	\$ 10,000 00
American Friends of the Jaffa Institute	Flushing, NY	NONE	General Fund	\$ 1,000 00
American Friends of Magen David Adom	New York, NY	NONE	General Fund	\$ 500 00
American Jewish Committee	Philadelphia, PA	NONE	General Fund	\$ 1,000 00
American Society for Yad Vashem	New York, NY	NONE	General Fund	\$ 500 00
Anti-Defamation League	Philadelphia, PA	NONE	General Fund	\$ 250 00
Autism Speaks	Princeton, NJ	NONE	General Fund	\$ 500 00
Birthright Israel Foundation	Needham, MA	NONE	General Fund	\$ 6,000 00
Camera	Boston, MA	NONE	General Fund	\$ 500 00
Coalition to Salute America's Heroes	Washington, DC	NONE	General Fund	\$ 2,000 00
Cristo Rey	Philadelphia, PA	NONE	General Fund	\$ 250 00
Cumberland College	Williamsburg, KY	NONE	General Fund	\$ 500 00
Disabled Veterans National Foundation	Washington, DC	NONE	General Fund	\$ 250 00
Feed the Children	Oklahoma City, OK	NONE	General Fund	\$ 500 00
Federation Early Learning Services	Philadelphia, PA	NONE	General Fund	\$ 750 00
Flame	San Francisco, CA	NONE	General Fund	\$ 500 00
Fleisher Art Memorial	Philadelphia, PA	NONE	General Fund	\$ 250 00
Friends of Ofanim	Wynnewood, PA	NONE	General Fund	\$ 1,000 00
Gershman Y	Philadelphia, PA	NONE	General Fund	\$ 500 00
Golden Slipper Club	Bala Cynwyd, PA	NONE	General Fund	\$ 1,000 00
Holocaust Oral History Archive of Gratz College	Melrose Park, PA	NONE	General Fund	\$ 500 00
Honest Reporting	Skokie, IL	NONE	General Fund	\$ 1,000 00
Israel Guide Dog Center for the Blind	Warrington, PA	NONE	General Fund	\$ 1,000 00
JBI International	New York, NY	NONE	General Fund	\$ 500 00
JCHAI Federation Hall	Bryn Mawr, PA	NONE	General Fund	\$ 6,800 00
Jewish Learning Venture	Melrose Park, PA	NONE	General Fund	\$ 500 00
Jewish National Fund	Philadelphia, PA	NONE	General Fund	\$ 2,000 00
Joel H. Levitt Memorial Charitable Fund	Philadelphia, PA	NONE	General Fund	\$ 500 00
Juvenile Diabetes Research Foundation	Philadelphia, PA	NONE	General Fund	\$ 500 00
Lancaster Cleft Palate Clinic	Lancaster, PA	NONE	General Fund	\$ 500 00
Larc School Inc	Bellmawr, NJ	NONE	General Fund	\$ 1,000 00
Living Beyond Breast Cancer	Haverford, PA	NONE	General Fund	\$ 500 00
Macula Vision Research Foundation	Philadelphia, PA	NONE	General Fund	\$ 2,500 00
Middle East Forum	Media, PA	NONE	General Fund	\$ 5,000 00

Maxwell Strawbridge Foundation
EIN: 23-2703172
990-PF, Part XV, Line 3a

Grants & Contributions Paid

Name	Address	Relationship	Purpose	Amount
Muscular Dystrophy Association	Tucson, AZ	NONE	General Fund	\$ 500 00
Museum of Jewish Heritage	Philadelphia, PA	NONE	General Fund	\$ 500 00
National Foundation for Celiac Awareness	New York, NY	NONE	General Fund	\$ 1,000 00
National Museum of American Jewish History	Ambler, PA	NONE	General Fund	\$ 1,000 00
New Horizons Senior Center	Philadelphia, PA	NONE	General Fund	\$ 500 00
Pennsylvania School for the Deaf	Narberth, PA	NONE	General Fund	\$ 500 00
Perelman Jewish Day School	Wynnewood, PA	NONE	General Fund	\$ 1,500 00
Philadelphia Theatre Company	Philadelphia, PA	NONE	General Fund	\$ 2,000 00
Regional Performing Arts Center, Inc	Philadelphia, PA	NONE	General Fund	\$ 20,000 00
RSVP of Montgomery County	Philadelphia, PA	NONE	General Fund	\$ 500 00
Southern Poverty Law Center	West Conshohocken, PA	NONE	General Fund	\$ 5,000 00
Support Center for Child Advocates	Montgomery, AL	NONE	General Fund	\$ 1,000 00
Terri Lynne Lokoff Child Care Foundation	Philadelphia, PA	NONE	General Fund	\$ 7,000 00
The Barnes Foundation	Philadelphia, PA	NONE	General Fund	\$ 500 00
The Friendship Circle	Camden, NJ	NONE	General Fund	\$ 1,800 00
The Jewish Foundation of Greater New Haven	Woodbridge, CT	NONE	General Fund	\$ 1,000 00
The Lam Foundation	Cincinnati, OH	NONE	General Fund	\$ 250 00
The Survivor Mitzvah Project	Los Angeles, CA	NONE	General Fund	\$ 1,800 00
Thomas Jefferson University	Philadelphia, PA	NONE	General Fund	\$ 1,000 00
United Way of Greater Philadelphia and Southern New Jersey	Philadelphia, PA	NONE	General Fund	\$ 5,000 00
University of Pennsylvania	Philadelphia, PA	NONE	General Fund	\$ 3,000 00
US Holocaust Memorial Museum	Los Angeles, CA	NONE	General Fund	\$ 1,000 00
Water for Africa Through Everyday Responsiveness	Dells, WI	NONE	General Fund	\$ 1,000 00
WhyHunger	Washington, DC	NONE	General Fund	\$ 500 00
Why, Inc	Philadelphia, PA	NONE	General Fund	\$ 250 00
World Jewish Congress Foundation	Narberth, PA	NONE	General Fund	\$ 1,500 00
Yiddish Book Center	Amherst, MA	NONE	General Fund	\$ 1,500 00
Zionist Organization of America	New York, NY	NONE	General Fund	\$ 500 00
Total				\$ 113,650.00

FORM 990-PF		DIVIDENDS AND INTEREST FROM SECURITIES		STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT		
CUSTODIAL ACCOUNT-COZEN O'CONNOR	8,744.	0.	8,744.		
TOTAL TO FM 990-PF, PART I, LN 4	8,744.	0.	8,744.		

FORM 990-PF		LEGAL FEES		STATEMENT	2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
COZEN O'CONNOR	5,000.	2,500.		2,500.	
TO FM 990-PF, PG 1, LN 16A	5,000.	2,500.		2,500.	

FORM 990-PF		ACCOUNTING FEES		STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
COZEN O'CONNOR	2,985.	1,492.		1,493.	
TO FORM 990-PF, PG 1, LN 16B	2,985.	1,492.		1,493.	

FORM 990-PF		TAXES		STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL EXCISE TAX	587.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	587.	0.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BANK CHARGES	110.	55.		55.	
TO FORM 990-PF, PG 1, LN 23	110.	55.		55.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	6
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
SEE SCHEDULE ATTACHED	214,552.		252,411.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	214,552.		252,411.	

Maxwell Strawbridge Foundation
EIN: 23-2703172
990-PF, Part II, Line 10b

Corporate Stock

Valuation Method for Book Value	Description of Investment	Ending Book Balance	FMV at Year-End
cost	AT&T Inc.- 500 shs	25,399.06	17,580.00
cost	Abbott Laboratories- 400 shs	7,907.87	15,332.00
cost	Abbvie Inc.- 400 shs	8,575.40	21,124.00
cost	Bank of America Corp (New)- 1200 shs	40,191.50	18,684.00
cost	General Electric Co.- 700 shs	4,457.22	19,621.00
cost	Hewlett-Packard Co.- 600 shs	9,743.89	16,788.00
cost	Intel Corp - 1350 shs	32,914.33	35,039.25
cost	Merck & Co., Inc - 400 shs	26,298.82	20,020.00
cost	Microsoft Corp.- 1050 shs	48,326.25	39,280.50
cost	Pepsico, Inc.- 200 shs	2,845.19	16,588.00
cost	Pfizer, Inc - 575 shs	2,212.88	17,612.25
cost	Verizon Communications Inc- 300 shs	5,679.55	14,742.00
Total		214,551.96	252,411.00