Form 990-PF

Department of the Treasury
Internal Revenue Service

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.

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning , and ending

Name of foundation: THE BARRA FOUNDATION, INC

A Employer identification number: 23-6277885

Number and street (or P O box number if mail is not delivered to street address): 200 W. LANCASTER AVENUE

Room/suite: 202

B Telephone number: 610.964.7601

City or town, state or province, country, and ZIP or foreign postal code: WAYNE, PA 19087

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶$ 96,006,627.

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

			(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	1,059,829.		N/A	
	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	307,155.	1,143,708.		STATEMENT 1
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	3,655,597.			
	b	Gross sales price for all assets on line 6a 9,443,088.				
	7	Capital gain net income (from Part IV, line 2)		687,024.		
	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	19,282.	6,633.		STATEMENT 2
	12	Total Add lines 1 through 11	5,041,863.	1,837,365.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	150,000.	40,500.		109,500.
	14	Other employee salaries and wages	206,927.	0.		206,927.
	15	Pension plans, employee benefits	13,903.	0.		13,903.
	16a	Legal fees STMT 3	200.	0.		200.
	b	Accounting fees STMT 4	23,848.	0.		23,848.
	c	Other professional fees STMT 5	277,002.	144,434.		132,568.
	17	Interest				
	18	Taxes STMT 6		13,740.		
	19	Depreciation and depletion				
	20	Occupancy	28,776.	0.		28,776.
	21	Travel, conferences, and meetings	9,187.	0.		9,187.
	22	Printing and publications				
	23	Other expenses STMT 7	37,502.	0.		33,423.
	24	Total operating and administrative expenses Add lines 13 through 23	747,345.	198,674.		558,332.
	25	Contributions, gifts, grants paid	3,878,289.			3,878,289.
	26	Total expenses and disbursements. Add lines 24 and 25	4,625,634.	198,674.		4,436,621.
	27	Subtract line 26 from line 12				
	a	Excess of revenue over expenses and disbursements	416,229.			
	b	Net investment income (if negative, enter -0-)		1,638,691.		
	c	Adjusted net income (if negative, enter -0-)			N/A	

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of year amounts only

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	98,473.	98,393.	98,393.
	2	Savings and temporary cash investments			
	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			
	c	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation ▶			
	12	Investments - mortgage loans			
	13	Investments - other STMT 9	70,361,486.	75,227,420.	95,908,234.
	14	Land, buildings, and equipment: basis ▶ Less accumulated depreciation ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item 1)	70,459,959.	75,325,813.	96,006,627.
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 ▶ ☐ 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	70,459,959.	75,325,813.	
	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**	70,459,959.	75,325,813.	
	31	**Total liabilities and net assets/fund balances**	70,459,959.	75,325,813.	

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	70,459,959.
2	Enter amount from Part I, line 27a	2	416,229.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	4,449,625.
4	Add lines 1, 2, and 3	4	75,325,813.
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	75,325,813.

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 STATEMENTS			
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	9,443,088.		8,756,064.	687,024.

	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) 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				687,024.

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	687,024.
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	4,684,566.	87,316,257.	.053651
2011	3,106,007.	86,300,471.	.035991
2010	3,618,746.	76,975,196.	.047012
2009	3,078,019.	70,423,310.	.043707
2008	3,640,612.	71,111,662.	.051196

2 **Total** of line 1, column (d)	2	.231557
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	.046311
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	91,135,719.
5 Multiply line 4 by line 3	5	4,220,586.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	16,387.
7 Add lines 5 and 6	7	4,236,973.
8 Enter qualifying distributions from Part XII, line 4	8	4,436,621.

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 instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b		1	16,387.
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	16,387.
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	16,387.
6	Credits/Payments:			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a 83,600.		
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	83,600.
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	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	67,213.
11	Enter the amount of line 10 to be: **Credited to 2014 estimated tax** ▶	67,213. **Refunded** ▶	11	0.

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		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.*	1b		X
c	Did the foundation file **Form 1120-POL** for this year?	1c		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*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	X	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	X	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		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?	6	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*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ DE,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	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*	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ WWW.BARRAFOUNDATION.ORG

14 The books are in care of ▶ KRISTINA L. WAHL GLANZMANN Telephone no ▶610-964-7601

Located at ▶200 W LANCASTER AVENUE, SUITE 202, WAYNE, PA ZIP+4 ▶19087

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

			Yes	No
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		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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

			Yes	No
	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):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☒ No If "Yes," list the years ▶ ______ , ______ , ______ , ______			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ______ , ______ , ______ , ______			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2013 as a result of (**1**) any purchase by the foundation or disqualified persons after May 26, 1969; (**2**) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (**3**) the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.)* 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** No: 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
SEE STATEMENT 10		150,000.	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
KRISTINA WAHL - 200 W. LANCASTER AVENUE, WAYNE, PA 19087	PRESIDENT 40.00	150,000.	0.	0.
KATE HOUSTOUN - 200 W. LANCASTER AVENUE, WAYNE, PA 19087	EMPLOYEE 40.00	76,620.	0.	0.
KRISTI POLING - 200 W. LANCASTER AVENUE, WAYNE, PA 19087	EMPLOYEE 40.00	76,620.	0.	0.

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
COLONIAL CONSULTING 750 3RD AVE #20, NEW YORK, NY 10017	INVESTMENT CONSULTING	72,039.

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 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	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	92,523,573.
b	Average of monthly cash balances			1b	
c	Fair market value of all other assets			1c	
d	**Total** (add lines 1a, b, and c)			1d	92,523,573.
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	92,523,573.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)			4	1,387,854.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4			5	91,135,719.
6	**Minimum investment return.** Enter 5% of line 5			6	4,556,786.

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	4,556,786.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	16,387.		
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	16,387.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	4,540,399.
4	Recoveries of amounts treated as qualifying distributions			4	0.
5	Add lines 3 and 4			5	4,540,399.
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	4,540,399.

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	4,436,621.
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	4,436,621.
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	16,387.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	4,420,234.

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				4,540,399.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			636,309.	
b Total for prior years: _____, _____, _____		0.		
3 Excess distributions carryover, if any, to 2013				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f **Total** of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ $ 4,436,621.				
a Applied to 2012, but not more than line 2a			636,309.	
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				3,800,312.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				740,087.
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	0.			
9 **Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

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

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

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

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

1 **Information Regarding Foundation Managers:**

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

NONE

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.

NONE

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:

SEE STATEMENT 11

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 Name and address (home or business)	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
a *Paid during the year*				
SEE ATTACHED SCHEDULE		PUBLIC CHARITY	VARIOUS	3,878,289.
Total			▶ 3a	3,878,289.
b *Approved for future payment*				
NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	307,155.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	3,655,597.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a PUBLICATIONS			15	6,633.	
b OTHER INCOME				12,649.	
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		3,982,034.	0.

13 **Total.** Add line 12, columns (b), (d), and (e) 13 3,982,034.

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
11A	ROYALTIES ARE RECEIVED FOR BOOK RESEARCH AND PUBLICATIONS. THE ROYALTY PAYMENTS ENABLE THE FOUNDATION TO PROVIDE GRANTS FOR ADDITIONAL RESEARCH.

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash	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.

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

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

▶ 11/17/14 ▶ PRESIDENT

Signature of officer or trustee Date Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self- employed	PTIN
JOHN F. KOSTENBAUDER, CPA		11/14/14		P00085631

Firm's name ▶ WEISERMAZARS LLP

Firm's EIN ▶ 13-1459550

Firm's address ▶ 501 OFFICE CENTER DRIVE, SUITE 300
FORT WASHINGTON, PA 19034-9913

Phone no. (215) 259-1000

Form **990-PF** (2013)

323622
10-10-13

THE BARRA FOUNDATION, INC CONTINUATION FOR 990-PF, PART IV
23-6277885 PAGE 1 OF 4

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	816 SHS - BANK NEW YORK MELLON CORP	P	09/17/12	05/03/13
b	1975 SHS - CHECK POINT SOFTWARE TECH COM	P	10/25/12	08/16/13
c	610 SHS - CHECK POINT SOFTWARE TECH COM	P	10/25/12	10/15/13
d	737 SHS - CHECK POINT SOFTWARE TECH COM	P	10/25/12	10/16/13
e	1431 SHS - CISCO SYSTEMS INC	P	09/17/12	06/06/13
f	1731 SHS - CME GROUP INC	P	09/17/12	05/21/13
g	838 SHS - CME GROUP INC	P	09/17/12	06/06/13
h	1719 SHS - CME GROUP INC	P	09/17/12	06/21/13
i	459 SHS - CME GROUP INC	P	05/03/13	12/06/13
j	838 SHS - DISCOVERY COMMUNICATIONS INC - C	P	09/17/12	04/16/13
k	121 SHS - DISCOVERY COMMUNICATIONS INC - C	P	09/17/12	05/03/13
l	1584 SHS - DISNEY WALT CO	P	09/17/12	05/03/13
m	546 SHS - DOVER CORP COMMON	P	09/17/12	08/16/13
n	615 SHS - DOVER CORP COMMON	P	09/17/12	08/16/13
o	149 SHS - EVEREST RE GROUP LTD COM	P	09/17/12	05/03/13

	(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	23,167.		19,330.	3,837.
b	111,661.		87,992.	23,669.
c	35,503.		27,177.	8,326.
d	42,465.		32,758.	9,707.
e	34,888.		27,375.	7,513.
f	111,585.		101,752.	9,833.
g	57,457.		49,260.	8,197.
h	130,626.		101,047.	29,579.
i	36,270.		27,998.	8,272.
j	59,690.		45,607.	14,083.
k	8,710.		6,585.	2,125.
l	101,653.		82,588.	19,065.
m	42,891.		32,928.	9,963.
n	53,716.		37,089.	16,627.
o	19,764.		16,441.	3,323.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(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				3,837.
b				23,669.
c				8,326.
d				9,707.
e				7,513.
f				9,833.
g				8,197.
h				29,579.
i				8,272.
j				14,083.
k				2,125.
l				19,065.
m				9,963.
n				16,627.
o				3,323.

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	
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	

323591
05-01-13

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	170 SHS - FRANKLIN RESOURCES INC	P	09/17/12	05/03/13
b	703 SHS - FRANKLIN RESOURCES INC	P	09/17/12	05/21/13
c	134 SHS - GOOGLE INC CL A	P	09/17/12	04/16/13
d	7 SHS - GOOGLE INC CL A	P	09/17/12	05/03/13
e	50 SHS - GOOGLE INC CL A	P	09/17/12	06/24/13
f	388 SHS - LVMH MOET HENNESSY LOUIS VUI	P	05/03/13	11/20/13
g	2 SHS - MASTERCARD INC CL A	P	09/17/12	05/03/13
h	4274 SHS - MICROSOFT CORP	P	09/17/12	04/16/13
i	525 SHS - MICROSOFT CORP	P	09/17/12	05/03/13
j	4201 SHS - MICROSOFT CORP	P	09/17/12	06/06/13
k	4262 SHS - NASDAQ OMX GROUP INC	P	09/17/12	03/06/13
l	486 SHS - NASDAQ OMX GROUP INC	P	09/17/12	05/03/13
m	202 SHS - ORACLE CORPORATION COM	P	09/17/12	05/03/13
n	1359 SHS - PARKER HANNIFIN CORP	P	09/17/12	05/21/13
o	12075.7710 SHS - PIMCO COMMODITY REAL RTN STRGY C	P	12/12/12	11/26/13

	(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	26,357.		21,499.	4,858.
b	117,090.		88,905.	28,185.
c	106,176.		95,055.	11,121.
d	5,885.		4,966.	919.
e	43,700.		35,468.	8,232.
f	73,177.		67,908.	5,269.
g	1,102.		907.	195.
h	123,490.		133,336.	-9,846.
i	17,445.		16,378.	1,067.
j	145,212.		131,058.	14,154.
k	137,588.		102,711.	34,877.
l	14,743.		11,712.	3,031.
m	6,822.		6,690.	132.
n	136,672.		115,396.	21,276.
o	67,383.		80,967.	-13,584.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(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				4,858.
b				28,185.
c				11,121.
d				919.
e				8,232.
f				5,269.
g				195.
h				-9,846.
i				1,067.
j				14,154.
k				34,877.
l				3,031.
m				132.
n				21,276.
o				-13,584.

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	
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	

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	6108.0160 SHS - PIMCO COMMODITY REAL RTN STRGY CL	P	06/20/13	11/26/13
b	1729 SHS - TIME WARNER INC	P	09/17/12	04/05/13
c	9 SHS - TIME WARNER INC	P	09/17/12	05/03/13
d	1471 SHS - UNILEVER NV NY SHARES	P	09/17/12	01/24/13
e	362 SHS - UNITED TECHNOLOGIES CORP COM	P	09/17/12	06/24/13
f	63 SHS - VISA INC	P	09/17/12	05/03/13
g	807 SHS - CME GROUP INC	P	09/17/12	12/05/13
h	105 SHS - CME GROUP INC	P	09/17/12	12/06/13
i	917 SHS - DISNEY WALT CO	P	09/17/12	10/15/13
j	431 SHS - DOVER CORP COMMON	P	09/17/12	10/15/13
k	447 SHS - DOVER CORP COMMON	P	09/17/12	10/18/13
l	159 SHS - GOOGLE INC CL A	P	09/17/12	12/05/13
m	656 SHS - NASDAQ OMX GROUP INC	P	09/17/12	12/05/13
n	1447 SHS - NASDAQ OMX GROUP INC	P	09/17/12	12/06/13
o	481 SHS - NASDAQ OMX GROUP INC	P	09/17/12	12/09/13

	(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	34,083.		35,079.	-996.
b	99,597.		77,403.	22,194.
c	542.		403.	139.
d	58,303.		52,779.	5,524.
e	33,321.		29,719.	3,602.
f	11,177.		8,431.	2,746.
g	63,676.		47,437.	16,239.
h	8,297.		6,172.	2,125.
i	60,710.		47,811.	12,899.
j	38,673.		25,992.	12,681.
k	39,777.		26,957.	12,820.
l	167,710.		112,789.	54,921.
m	25,636.		15,809.	9,827.
n	56,016.		34,872.	21,144.
o	18,745.		11,592.	7,153.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(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				-996.
b				22,194.
c				139.
d				5,524.
e				3,602.
f				2,746.
g				16,239.
h				2,125.
i				12,899.
j				12,681.
k				12,820.
l				54,921.
m				9,827.
n				21,144.
o				7,153.

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	
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	

323591
05-01-13

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	405 SHS - NASDAQ OMX GROUP INC	P	09/17/12	12/10/13
b	172 SHS - NASDAQ OMX GROUP INC	P	09/17/12	12/12/13
c	491 SHS - PARKER HANNIFIN CORP	P	09/17/12	10/15/13
d	108 SHS - PARKER HANNIFIN CORP	P	09/17/12	10/16/13
e	150 SHS - PARKER HANNIFIN CORP	P	09/17/12	10/17/13
f	15535.4910 SHS - PIMCO COMMODITY REAL RTN STRGY C	P	03/22/12	11/26/13
g	838 SHS - UNITED TECHNOLOGIES CORP COM	P	09/17/12	10/15/13
h	25993.8840 SHS - CENTURY SMALL CAP SELECT-INS	P	08/16/05	09/10/13
i	653502.0850 SHS - PIMCO COMMODITY REAL RTN STRGY	P	02/08/10	11/26/13
j	33807.8290 SHS - PIMCO TOTAL RETURN CL I	P	04/30/20	01/18/13
k	17857.1430 SHS - PIMCO TOTAL RETURN CL I	P	10/31/08	01/28/13
l	PASS-THROUGH CAPITAL GAINS	P	01/01/13	12/31/13
m	PASS-THROUGH CAPITAL GAINS	P	12/31/12	12/31/13
n	CAPITAL GAINS DIVIDENDS			
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	15,780.		9,760.	6,020.
b	6,703.		4,145.	2,558.
c	52,112.		41,692.	10,420.
d	11,449.		9,171.	2,278.
e	15,903.		12,737.	3,166.
f	86,689.		103,010.	-16,321.
g	89,134.		68,797.	20,337.
h	850,000.		641,009.	208,991.
i	3,646,542.		5,191,737.	-1,545,195.
j	380,000.		353,535.	26,465.
k	200,000.		178,343.	21,657.
l	26,319.			26,319.
m	298,311.			298,311.
n	1,154,995.			1,154,995.
o				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(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				6,020.
b				2,558.
c				10,420.
d				2,278.
e				3,166.
f				-16,321.
g				20,337.
h				208,991.
i				-1,545,195.
j				26,465.
k				21,657.
l				26,319.
m				298,311.
n				1,154,995.
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	687,024.
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

THE BARRA FOUNDATION
23-6277885
990-PF, 2013
PART XV, LINE 3A

Grants & Contributions paid during the year

Recipient Name	Recipient Address	Relation	FDN Status	Purpose	Amount
Academy of Natural Sciences		N/A	Public	Director's Grants	5,000 00
ACHIEVEability		N/A	Public	Planning Grants	50,000 00
Arise Academy Charter High School		N/A	Public	Project Grants	37,912 00
Art Sanctuary		N/A	Public	Arts & Culture	15,000 00
Art-Reach		N/A	Public	Project Grants	20,000 00
ArtWell Collaborative		N/A	Public	Education	20,000 00
Asian Arts Initiative		N/A	Public	Arts & Culture	15,000.00
BalletX		N/A	Public	Arts & Culture	15,000 00
Boys' Latin of Phila Charter School		N/A	Public	Director's Grants	7,500 00
Brandywine Health Foundation		N/A	Public	Human Services	20,000 00
Brandywine Health Foundation		N/A	Public	Planning Grants	32,000 00
Breadboard		N/A	Public	Project Grants	20,000 00
Broad Street Ministry		N/A	Public	Human Services	20,000.00
Bryn Mawr Film Institute		N/A	Public	Arts & Culture	15,000 00
Bucknell University		N/A	Public	Director's Grants	2,500.00
Cambodian Association of Greater Phila		N/A	Public	Human Services	20,000 00
Center for Literacy		N/A	Public	Education	20,000 00
Central Montgomery MH/MR Center		N/A	Public	Health	20,000 00
Chester County Community Dental Center		N/A	Public	Health	20,000 00
Chester County Historical Society		N/A	Public	Planning Grants	38,000 00
Chester Higher Education Council		N/A	Public	Education	20,000.00
Children's Crisis Treatment Center		N/A	Public	Health	20,000 00
Children's Literacy Initiative		N/A	Public	Education	20,000.00
Church Farm School		N/A	Public	Director's Grants	5,000 00
College of Physicians		N/A	Public	Project Grants	20,000 00
College Possible		N/A	Public	Project Grants	50,000 00
Common Market Philadelphia		N/A	Public	Planning Grants	20,000 00

THE BARRA FOUNDATION
23-6277885
990-PF, 2013
PART XV, LINE 3A

Grants & Contributions paid during the year

Recipient Name	Recipient Address	Relation	FDN Status	Purpose	Amount
Community Partnership School		N/A	Public	Director's Grants	5,000 00
Community Partnership School		N/A	Public	Special Grants	75,000 00
Congreso de Latinos Unidos		N/A	Public	Project Grants	50,000 00
Cons Ctr for Arts & Artifacts		N/A	Public	Planning Grants	24,000 00
Cradles to Crayons		N/A	Public	Director's Grants	2,500 00
Cristo Rey Philadelphia		N/A	Public	Project Grants	75,000 00
Drexel University		N/A	Public	Project Grants	20,000 00
EducationWorks		N/A	Public	Project Grants	75,000.00
Episcopal Academy		N/A	Public	Director's Grants	15,000 00
Esperanza Immigration Legal Services		N/A	Public	Human Services	20,000 00
Face to Face Germantown		N/A	Public	Human Services	20,000 00
First Person Arts		N/A	Public	Arts & Culture	15,000 00
Fleisher Art Memorial		N/A	Public	Planning Grants	37,500.00
Franklin's Paine Skatepark Fund		N/A	Public	Planning Grants	30,000 00
Free Library of Philadelphia Foundation		N/A	Public	Planning Grants	37,500.00
Friends of St Martin de Porres School		N/A	Public	Director's Grants	5,000 00
Gearing Up		N/A	Public	Human Services	20,000 00
Germantown Friends School		N/A	Public	Director's Grants	8,000 00
Gesu School		N/A	Public	Director's Grants	7,500 00
Grants Managers Network		N/A	Public	Special Grants	1,000 00
GreenLight Fund		N/A	Public	Project Grants	60,000 00
Greensgrow Philadelphia Project		N/A	Public	Project Grants	42,500 00
Habitat for Humanity- Philadelphia		N/A	Public	Director's Grants	3,750 00
Hearing Loss Assoc of America		N/A	Public	Director's Grants	5,000 00
Hidden City Philadelphia		N/A	Public	Project Grants	20,000 00
Historic Germantown Preserved		N/A	Public	Project Grants	75,000 00
Historical Society of PA		N/A	Public	Project Grants	35,750 00

THE BARRA FOUNDATION
23-6277885
990-PF, 2013
PART XV, LINE 3A

Grants & Contributions paid during the year

Recipient Name	Recipient Address	Relation	FDN Status	Purpose	Amount
Homeless Advocacy Project		N/A	Public	Project Grants	50,000 00
Hope Springs Equestrian Therapy, Inc		N/A	Public	Health	20,000 00
Hurricane Island-Outward Bound School		N/A	Public	Director's Grants	2,500 00
Independence Seaport Museum		N/A	Public	Project Grants	30,000 00
International Myeloma Foundation		N/A	Public	Director's Grants	2,000 00
Investigative News Network		N/A	Public	Education	20,000 00
John Bartram Association		N/A	Public	Arts & Culture	15,000 00
Kelly Anne Dolan Memorial Fund		N/A	Public	Director's Grants	1,000 00
KIPP Philadelphia Schools		N/A	Public	Project Grants	75,000 00
Kulu Mele Dance Ensemble		N/A	Public	Arts & Culture	15,000 00
Kun-Yang Lin/Dancers		N/A	Public	Arts & Culture	15,000 00
La Comunidad Hispana		N/A	Public	Health	20,000 00
LaSalle Academy		N/A	Public	Director's Grants	2,000 00
Legal Clinic for the Disabled		N/A	Public	Health	20,000 00
Lehigh University Athletics		N/A	Public	Director's Grants	2,500 00
Local Initiatives Support Corporation		N/A	Public	Human Services	20,000 00
Lutheran Settlement House		N/A	Public	Human Services	20,000 00
MANNA		N/A	Public	Health	20,000.00
Maternal & Child Health Consortium		N/A	Public	Health	20,000 00
McNeil Center for Early American Studies		N/A	Public	Special Grants	10,000 00
Methodist Family Services of Philadelphia		N/A	Public	Planning Grants	17,000.00
Mighty Writers		N/A	Public	Education	20,000 00
Mighty Writers		N/A	Public	Project Grants	38,000 00
Morris Arboretum		N/A	Public	Director's Grants	2,500 00
Morris Arboretum		N/A	Public	Planning Grants	30,000.00
Musicopia, Inc		N/A	Public	Arts & Culture	15,000 00
Nationalities Service Center		N/A	Public	Human Services	20,000 00

THE BARRA FOUNDATION
23-6277885
990-PF, 2013
PART XV, LINE 3A

Grants & Contributions paid during the year

Recipient Name	Recipient Address	Relation	FDN Status	Purpose	Amount
Need in Deed		N/A	Public	Education	20,000 00
New Directions for Women		N/A	Public	Project Grants	42,687.00
New Leash on Life		N/A	Public	Planning Grants	45,000 00
Opera Company of Philadelphia		N/A	Public	Planning Grants	37,500 00
Partners for Sacred Places		N/A	Public	Project Grants	62,500 00
Pathways to Housing PA		N/A	Public	Human Services	20,000 00
Pathways to Housing PA		N/A	Public	Planning Grants	20,000 00
Penn Asian Senior Services		N/A	Public	Health	20,000 00
Penn Asian Senior Services		N/A	Public	Planning Grants	21,000 00
Penn Memory Center		N/A	Public	Project Grants	50,000 00
Pennsylvania Academy of Fine Arts		N/A	Public	Project Grants	25,000 00
Pennsylvania Bible Society		N/A	Public	Director's Grants	2,500 00
Pennsylvania Health Law Project		N/A	Public	Health	20,000 00
People's Light & Theatre Company		N/A	Public	Project Grants	40,000 00
Philabundance		N/A	Public	Director's Grants	2,500 00
Philadelphia Education Fund		N/A	Public	Planning Grants	60,000 00
Philadelphia Folklore Project		N/A	Public	Arts & Culture	15,000 00
Philadelphia Futures		N/A	Public	Education	20,000 00
Philadelphia Live Arts Festival		N/A	Public	Arts & Culture	15,000 00
Philadelphia Mural Arts Advocates		N/A	Public	Project Grants	50,000 00
Philadelphia Museum of Art		N/A	Public	Planning Grants	24,000 00
Philadelphia School Partnership		N/A	Public	Project Grants	100,000 00
Philly Youth Poetry Movement		N/A	Public	Arts & Culture	15,000.00
Playworks Philadelphia		N/A	Public	Education	20,000 00
Preservation Alliance for Greater Phila		N/A	Public	Planning Grants	75,000 00
Project Based Learning, Inc		N/A	Public	Project Grants	41,000 00
Project H O M E		N/A	Public	Project Grants	120,000 00

THE BARRA FOUNDATION
23-6277885
990-PF, 2013
PART XV, LINE 3A

Grants & Contributions paid during the year

Recipient Name	Recipient Address	Relation	FDN Status	Purpose	Amount
Public Citizens for Children & Youth		N/A	Public	Planning Grants	36,000 00
Public Health Management Corporation		N/A	Public	Project Grants	25,500 00
Puentes de Salud		N/A	Public	Health	20,000 00
Radnor Educational Foundation		N/A	Public	Director's Grants	5,000 00
Ready,Willing & Able- The Doe Fund, Inc		N/A	Public	Director's Grants	2,500 00
Rebuilding Together Philadelphia		N/A	Public	Director's Grants	3,750 00
Rock to the Future		N/A	Public	Director's Grants	2,500.00
Scribe Video Center		N/A	Public	Arts & Culture	15,000 00
SEAMAAC, Inc.		N/A	Public	Human Services	20,000 00
Settlement Music School		N/A	Public	Arts & Culture	15,000 00
Single Stop USA		N/A	Public	Project Grants	50,000.00
Smith Memorial Playground		N/A	Public	Health	20,000 00
Spark Program		N/A	Public	Project Grants	50,000 00
Spiral Q Puppet Theater		N/A	Public	Education	20,000 00
Springboard Collaborative		N/A	Public	Project Grants	25,000 00
Starfinder Foundation		N/A	Public	Planning Grants	22,000 00
Summer Search		N/A	Public	Education	20,000 00
Taller Puertorriqueno		N/A	Public	Arts & Culture	15,000 00
Temple Univ /The Intergenerational Ctr		N/A	Public	Project Grants	50,000 00
The Byerschool Foundation		N/A	Public	Planning Grants	25,000 00
The Chester Fund for Edu & the Arts, Inc		N/A	Public	Project Grants	76,000 00
The College Settlement of Philadelphia		N/A	Public	Planning Grants	45,000 00
The Doe Fund, Inc		N/A	Public	Human Services	20,000 00
The Open Line		N/A	Public	Planning Grants	25,000 00
The Pennington School		N/A	Public	Director's Grants	12,500 00
The Pennsbury Society		N/A	Public	Arts & Culture	15,000 00
The Philadelphia Dance Company		N/A	Public	Planning Grants	20,000 00

THE BARRA FOUNDATION
23-6277885
990-PF, 2013
PART XV, LINE 3A

Grants & Contributions paid during the year

Recipient Name	Recipient Address	Relation	FDN Status	Purpose	Amount
The Reinvestment Fund		N/A	Public	Planning Grants	50,000 00
The Wistar Institute		N/A	Public	Director's Grants	5,000 00
Theatre Horizon		N/A	Public	Arts & Culture	15,000 00
Trustees of Univ of PA		N/A	Public	Education	20,000 00
University City District		N/A	Public	Human Services	20,000 00
University City District		N/A	Public	Project Grants	41,000 00
University City Science Center		N/A	Public	Project Grants	60,000 00
University of PA - Abramson Cancer Center		N/A	Public	Director's Grants	2,000 00
Wells Fargo		N/A	Public	Special Grants	7,940 00
Woodlynde School		N/A	Public	Director's Grants	15,000 00
Youth Empowerment Services		N/A	Public	Education	20,000 00
Youth Empowerment Services		N/A	Public	Director's Grants	2,500.00
Youth Empowerment Services		N/A	Public	Project Grants	90,000 00
Zoological Society of Philadelphia		N/A	Public	Director's Grants	15,000.00
					3,878,289 00

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDENDS AND INTEREST	1,462,150.	1,154,995.	307,155.	1,143,708.	
TO PART I, LINE 4	1,462,150.	1,154,995.	307,155.	1,143,708.	

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
PUBLICATIONS	6,633.	6,633.	
OTHER INCOME	12,649.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	19,282.	6,633.	

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	200.	0.		200.
TO FM 990-PF, PG 1, LN 16A	200.	0.		200.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	23,848.	0.		23,848.
TO FORM 990-PF, PG 1, LN 16B	23,848.	0.		23,848.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
RESEARCH AND CONSULTING	132,568.	0.		132,568.
INVESTMENT FEES	72,039.	72,039.		0.
CUSTODIAL FEES	72,395.	72,395.		0.
TO FORM 990-PF, PG 1, LN 16C	277,002.	144,434.		132,568.

FORM 990-PF TAXES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAXES	0.	13,740.		0.
TO FORM 990-PF, PG 1, LN 18	0.	13,740.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES	14,784.	0.		14,784.
TELEPHONE	2,653.	0.		2,653.
INSURANCE	3,835.	0.		3,835.
OFFICE SUPPLIES	3,475.	0.		3,475.
UTILITIES	1,243.	0.		1,243.
RENOVATIONS & EQUIPMENT	-622.	0.		-622.
OTHER FEES	3,770.	0.		0.
IT CONSULTING	8,055.	0.		8,055.
GIFTS	309.	0.		0.
TO FORM 990-PF, PG 1, LN 23	37,502.	0.		33,423.

FORM 990-PF OTHER INCREASES IN NET ASSETS OR FUND BALANCES STATEMENT 8

DESCRIPTION	AMOUNT
FOREIGN TAX NOT DEDUCTED FOR BOOK	13,740.
GAIN ON SALE OF ASSETS NOT REFLECTED ON RETURN	4,435,852.
BEGINNING BALANCE ADJUSTMENT	33.
TOTAL TO FORM 990-PF, PART III, LINE 3	4,449,625.

FORM 990-PF OTHER INVESTMENTS STATEMENT 9

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
WILMINGTON TRUST CO	COST	75,227,420.	95,908,234.
TOTAL TO FORM 990-PF, PART II, LINE 13		75,227,420.	95,908,234.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 10

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
KRISTINA L. WAHL 200 W. LANCASTER AVENUE, SUITE 2010 WAYNE, PA 19087	PRESIDENT, TREASURER, DIRECTOR 40.00	150,000.	0.	0.
WILLIAM HARRAL 200 W. LANCASTER AVENUE, SUITE 2010 WAYNE, PA 19087	DIRECTOR, BOARD MEMBER 1.00	0.	0.	0.
SEYMOUR S PRESTON III 200 W. LANCASTER AVENUE, SUITE 2010 WAYNE, PA 19087	CHAIRMAN, DIRECTOR, BOARD 5.00	0.	0.	0.
ROBERT L MCNEIL III 200 W. LANCASTER AVENUE, SUITE 2010 WAYNE, PA 19087	ASST TREAS, DIRECTOR, BOAR 1.00	0.	0.	0.
COLLIN F MCNEIL 200 W. LANCASTER AVENUE, SUITE 2010 WAYNE, PA 19087	DIRECTOR, BOARD MEMBER 1.00	0.	0.	0.
JOANNA MCNEIL LEWIS 200 W. LANCASTER AVENUE, SUITE 2010 WAYNE, PA 19087	DIRECTOR, BOARD MEMBER 1.00	0.	0.	0.
VICTORIA MCNEIL LE VINE 200 W. LANCASTER AVENUE, SUITE 2010 WAYNE, PA 19087	SECRETARY, DIRECTOR, BOARD 1.00	0.	0.	0.
A. LOUIS DENTON 200 W. LANCASTER AVENUE, SUITE 2010 WAYNE, PA 19087	VICE PRESIDENT, DIRECTOR, 1.00	0.	0.	0.
ERIC C. ANDERSON 200 W. LANCASTER AVENUE, SUITE 2010 WAYNE, PA 19087	DIRECTOR, BOARD MEMBER 1.00	0.	0.	0.

FRAZIERITA D. KLASEN 200 W. LANCASTER AVENUE, SUITE 2010 WAYNE, PA 19087	DIRECTOR, BOARD MEMBER 1.00	0.	0.	0.
PATRICK P. COYNE 200 W. LANCASTER AVENUE, SUITE 2010 WAYNE, PA 19087	DIRECTOR, BOARD MEMBER 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		150,000.	0.	0.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 11
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

KRISTINA WAHL
200 W. LANCASTER AVENUE
WAYNE, PA 19087

TELEPHONE NUMBER

610-964-7601

FORM AND CONTENT OF APPLICATIONS

ALL LETTERS OF INQUIRY MUST BE SUBMITTED THROUGH AN ONLINE SYSTEM AT WWW.BARRAFOUNDATION.ORG. THE LOI MUST INCLUDE INFORMATION ABOUT THE TYPE OF THE REQUEST, TIMEFRAME, TARGETED AUDIENCE, ETC.

ANY SUBMISSION DEADLINES

NO FORMAL SUBMISSION DEADLINES.

RESTRICTIONS AND LIMITATIONS ON AWARDS

MOST GRANTS ARE RESTRICTED TO THE GREATER PHILADELPHIA COMMUNITY. PRIMARY FIELDS OF INTEREST ARE 1) HUMAN SERVICES 2) ART AND CULTURE 3)HEALTH 4)EDUCATION. IN GENERAL, THE FOUNDATION DOES NOT PROVIDE SUPPORT FOR BUDGET DEFICITS, ENDOWMENT OR CAPITAL CAMPAIGNS (INCLUDING CONSTRUCTION, EQUIPMENT, RENOVATIONS OR REPAIRS), PUBLICATIONS, EXHIBITIONS OR CATALOGUES, INTERNATIONAL PROGRAMS AND INSTITUTIONS, OR INDIVIDUAL SCHOLARSHIPS OR FELLOWSHIPS.

Form **8868**
(Rev January 2014)

Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ **File a separate application for each return.**

▶ **Information about Form 8868 and its instructions is at** *www irs gov/form8868* ·

OMB No. 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box ▶ ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing *(e-file)*. You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions) For more details on the electronic filing of this form, visit *www irs gov/efile* and click on *e-file for Charities & Nonprofits*

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ▶ ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Enter filer's identifying number

Type or print

File by the due date for filing your return See instructions

Name of exempt organization or other filer, see instructions.
THE BARRA FOUNDATION, INC

Employer identification number (EIN) or
23-6277885

Number, street, and room or suite no If a P.O. box, see instructions
200 W. LANCASTER AVENUE, NO. 202

Social security number (SSN)

City, town or post office, state, and ZIP code For a foreign address, see instructions.
WAYNE, PA 19087

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	**Return Code**	**Application Is For**	**Return Code**
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ KRISTINA L. WAHL GLANZMANN
  200 W LANCASTER AVENUE, SUITE 202 - WAYNE, PA 19087
  Telephone No ▶ 610-964-7601 Fax No ▶
- If the organization does not have an office or place of business in the United States, check this box ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ If this is for the whole group, check this box ▶ ☐ If it is for part of the group, check this box ▶ ☐ and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2014 , to file the exempt organization return for the organization named above The extension is for the organization's return for:

▶ ☒ calendar year 2013 or

▶ ☐ tax year beginning ______________ , and ending ______________ .

2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a	If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	$ 0.
b	If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit	3b	$ 83,600.
c	**Balance due.** Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	$ 0.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453 EO and Form 8879-EO for payment instructions.

LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.** Form **8868** (Rev 1-2014)

323841
12-31-13

- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** and check this box ▶ ☒

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Enter filer's identifying number, see instructions

Type or print

File by the due date for filing your return See instructions

Name of exempt organization or other filer, see instructions.
THE BARRA FOUNDATION, INC

Employer identification number (EIN) or
23-6277885

Number, street, and room or suite no. If a P.O. box, see instructions.
200 W. LANCASTER AVENUE, NO. 202

Social security number (SSN)

City, town or post office, state, and ZIP code For a foreign address, see instructions.
WAYNE, PA 19087

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	**Return Code**	**Application Is For**	**Return Code**
Form 990 or Form 990-EZ	01	[illegible]	[illegible]
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

- The books are in the care of ▶ KRISTINA L. WAHL GLANZMANN 200 W LANCASTER AVENUE, SUITE 202 - WAYNE, PA 19087

Telephone No. ▶ 610-964-7601 Fax No. ▶

- If the organization does not have an office or place of business in the United States, check this box ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ . If this is for the whole group, check this box ▶ ☐ . If it is for part of the group, check this box ▶ ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until NOVEMBER 15, 2014.

5 For calendar year 2013 , or other tax year beginning ______ , and ending ______ .

6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension
ADDITIONAL TIME IS NEEDED TO PREPARE A COMPLETE AND ACCURATE RETURN.

8a	If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	$ 0.
b	If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	$ 83,600.
c	**Balance due.** Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c	$ 0.

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ▶ Title ▶ CPA Date ▶ 8/13/2014

Form 8868 (Rev 1-2014)