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

2013

Department of the Treasury  
Internal Revenue Service

- 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](http://www.irs.gov/form990pf).

For calendar year 2013, or tax year beginning

, 2013, and ending

RODSTEIN FOUNDATION  
15695 BOEING COURT  
WELLINGTON, FL 33414-8359

**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, column (c), line 16) **J** Accounting method.  Cash  Accrual  
 Other (specify) (Part I, column (d) must be on cash basis) ► \$ 254,578.

**A** Employer identification number  
23-6697762

**B** Telephone number (see the instructions)  
561-948-1262

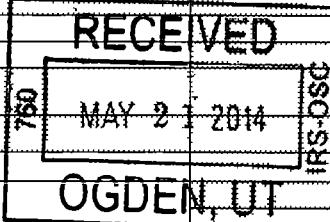
**C** If exemption application is pending, check here ►

**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 ►

<b>Part I</b> Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
REVENUE	1 Contributions, gifts, grants, etc, received (att sch)				
	2 Ck ► <input checked="" type="checkbox"/> If the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	4,462.	4,462.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10	3,440.			
	b Gross sales price for all assets on line 6a	19,817.			
	7 Capital gain net income (from Part IV, line 2)		3,440.		
	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/(loss) (att sch)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	7,902.	7,902.			
ADMINISTRATIVE OPERATING AND EXPENSES	13 Compensation of officers, directors, trustees, etc.	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch)	1,180.	1,062.		118.
	c Other prof fees (attach sch)				
	17 Interest				
	18 Taxes (attach schedule)(see instrs)	SEE STM 1	324.		
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	1,504.	1,062.		118.
25 Contributions, gifts, grants paid PART XV	8,025.			8,025.	
26 Total expenses and disbursements. Add lines 24 and 25	9,529.	1,062.		8,143.	
27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements	-1,627.				
b Net investment income (if negative, enter 0)		6,840.			
c Adjusted net income (if negative, enter 0)					



Part II Balance Sheets		Attached schedules and amounts in the description column should be for end of year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
A S S E T S	1	1 Cash – non-interest-bearing			
	2	2 Savings and temporary cash investments	2,781.	2,684.	2,684.
	3	3 Accounts receivable			
		Less allowance for doubtful accounts			
	4	4 Pledges receivable			
		Less allowance for doubtful accounts			
	5	5 Grants receivable			
	6	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	7 Other notes and loans receivable (attach sch.)			
		Less. allowance for doubtful accounts			
	8	8 Inventories for sale or use			
	9	9 Prepaid expenses and deferred charges			
	10a	10a Investments – U.S. and state government obligations (attach schedule)			
	b	b Investments – corporate stock (attach schedule)			
	c	c Investments – corporate bonds (attach schedule)			
	11	11 Investments – land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)			
	12	12 Investments – mortgage loans			
	13	13 Investments – other (attach schedule)	STATEMENT 3	134,644.	133,121.
	14	14 Land, buildings, and equipment basis			
		Less: accumulated depreciation (attach schedule)			
	15	15 Other assets (describe ▶ )			
	16	16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)		137,425.	135,805.
					254,578.
L I A B I L I T I E S	17	17 Accounts payable and accrued expenses			
	18	18 Grants payable			
	19	19 Deferred revenue			
	20	20 Loans from officers, directors, trustees, & other disqualified persons			
	21	21 Mortgages and other notes payable (attach schedule)			
	22	22 Other liabilities (describe ▶ )			
	23	23 Total liabilities (add lines 17 through 22)		0.	0.
N F E T T O D A Y S B S A E T T A S N C O R E S		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.	▶ <input type="checkbox"/>		
	24	24 Unrestricted			
	25	25 Temporarily restricted			
	26	26 Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.	▶ <input checked="" type="checkbox"/>		
	27	27 Capital stock, trust principal, or current funds		84,771.	84,771.
	28	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29	29 Retained earnings, accumulated income, endowment, or other funds.		52,654.	51,034.
	30	30 Total net assets or fund balances (see instructions)		137,425.	135,805.
	31	31 Total liabilities and net assets/fund balances (see instructions)		137,425.	135,805.

## 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	137,425.
2	Enter amount from Part I, line 27a	2	-1,627.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 4	3	7.
4	Add lines 1, 2, and 3	4	135,805.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	135,805.

**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 shares MLC Company)			(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
<b>1 a SEE STATEMENT 5</b>					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Column (h)) gain minus column (k), but not less than 0- or Losses (from column (h))	
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2	3,440.	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6).			3	-18.	
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8					

**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 (column (b) divided by column (c))
2012	6,905.	204,669.	0.033737
2011	6,705.	203,679.	0.032919
2010	8,154.	190,676.	0.042764
2009	13,896.	163,755.	0.084858
2008	1,411.	201,083.	0.007017

2 Total of line 1, column (d)	2	0.201295
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.040259
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	233,189.
5 Multiply line 4 by line 3	5	9,388.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	68.
7 Add lines 5 and 6	7	9,456.
8 Enter qualifying distributions from Part XII, line 4	8	8,143.

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)**

1 a Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter 'N/A' on line 1	(attach copy of letter if necessary – see instrs)	1	137.													
Date of ruling or determination letter _____																
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																
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2 Add lines 1 and 2	3	4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	6 Credits/Payments.	6a 2013 estimated tax pmts and 2012 overpayment credited to 2013	6b Exempt foreign organizations – tax withheld at source	6c Tax paid with application for extension of time to file (Form 8868)	6d Backup withholding erroneously withheld	7 Total credits and payments. Add lines 6a through 6d	8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	11 Enter the amount of line 10 to be Credited to 2014 estimated tax ► 25. Refunded	
1																0.
3																137.
4																0.
5																137.
7	162.															
8																
9	0.															
10	25.															
11	0.															

**Part VII-A Statements Regarding Activities**

1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

	Yes	No
1 a	X	

1 b	X
-----	---

1 c	X
-----	---

2	X
---	---

3	X
---	---

4 a	X
-----	---

4 b	N/A
-----	-----

5	X
---	---

6	X
---	---

7	X
---	---

8 b	X
-----	---

9	X
---	---

10	X
----	---

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

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

4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

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*

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?

7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV

8 a Enter the states to which the foundation reports or with which it is registered (see instructions) ►

N/A

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

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

10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses

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

11		X
12		X
13	X	
Website address ► <u>N/A</u>		
14	Telephone no. ► <u>561-948-1262</u>	
Located at ► <u>15695 BOEING COURT WELLINGTON FL</u> ZIP + 4 ► <u>33414-8359</u>		
15	<u>N/A</u> ► <u>15</u>	N/A
16	Yes	No
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**

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.		
	Yes	No
1 a 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
1 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
Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>		
1 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?		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 ► <u>20 ___, 20 ___, 20 ___, 20 ___,</u>		
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 ► <u>20 ___, 20 ___, 20 ___, 20 ___,</u>		
3 a 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
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?  Yes  No

(3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No

(4) Provide a grant to an organization other than a charitable, etc, organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)  Yes  No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  Yes  No

b If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

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?

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d)

N/A  Yes  No

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 (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
MARC RODSTEIN 15695 BOEING COURT WELLINGTON, FL 33414-8359	TRUSTEE 10.00	0.	0.	0.
-----				
-----				
-----				
-----				
-----				
-----				

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

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

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

►

0

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

**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

## Part IX-A Summary of Direct Charitable Activities

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

## Expenses

1 ACTIVITIES CONSIST OF GRANT MAKING TO RECOGNIZED SECTION 501(C)(3) ORGANIZATIONS AS DETAILED IN PART XV OF THIS RETURN.

8, 143.

2

6

2

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

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

Amount

1

**N/A**

1

All other program-related investments See instructions

3

Total Add lines 1 through 3

100

Form 890 BE (2013)

**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 234,476.
b	Average of monthly cash balances	1b 2,264.
c	Fair market value of all other assets (see instructions)	1c
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b> 236,740.
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	3 236,740.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4 3,551.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5 233,189.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6 11,659.

**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 11,659.
2a	Tax on investment income for 2013 from Part VI, line 5	2a 137.
b	Income tax for 2013 (This does not include the tax from Part VI )	2b
c	Add lines 2a and 2b	2c 137.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 11,522.
4	Recoveries of amounts treated as qualifying distributions	4
5	Add lines 3 and 4	5 11,522.
6	Deduction from distributable amount (see instructions)	6
7	<b>Distributable amount as adjusted</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7 11,522.

**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 8,143.
b	Program-related investments – total from Part IX-B	1b
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2
3	Amounts set aside for specific charitable projects that satisfy the	
a	Suitability test (prior IRS approval required)	3a
b	Cash distribution test (attach the required schedule)	3b
4	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4 8,143.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6 8,143.

**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				11,522.
2 Undistributed income, if any, as of the end of 2013			0.	
a Enter amount for 2012 only		0.		
b Total for prior years 20 ___, 20 ___, 20 ___,				
3 Excess distributions carryover, if any, to 2013				
a From 2008				
b From 2009 3,530.				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	3,530.			
4 Qualifying distributions for 2013 from Part XII, line 4 ► \$ 8,143.			0.	
a Applied to 2012, but not more than line 2a				
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				8,143.
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).)	3,379.			3,379.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	151.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount – see instructions		0.		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount – see instructions			0.	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	151.			
10 Analysis of line 9.				
a Excess from 2009 151.				
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

**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) )

MARC RODSTEIN

**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 of the person to whom applications should be addressed

SEE STATEMENT 6

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

SEE STATEMENT FOR LINE 2A

### c Any submission deadlines

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

**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
<i>a Paid during the year</i> SEE STATEMENT 7				
<b>Total</b>			► 3a	8,025.
<i>b Approved for future payment</i>				
<b>Total</b>			► 3b	

## 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 (See instructions.)
	(a) Business code	(b) Amount	(c) Exclu- sion 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			14		
4 Dividends and interest from securities			14	4,462.	
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	3,440.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue.					
a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				7,902.	
13 Total. Add line 12, columns (b), (d), and (e)					7,902.

**Relationship of  $A$  without the  $A$  constant to  $\sigma$  and  $\tau$**

**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	1 a (1)	X
(2)	Other assets	1 a (2)	X
b	Other transactions		
(1)	Sales of assets to a noncharitable exempt organization	1 b (1)	X
(2)	Purchases of assets from a noncharitable exempt organization	1 b (2)	X
(3)	Rental of facilities, equipment, or other assets	1 b (3)	X
(4)	Reimbursement arrangements	1 b (4)	X
(5)	Loans or loan guarantees	1 b (5)	X
(6)	Performance of services or membership or fundraising solicitations	1 b (6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1 c	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

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

~~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.~~

Sign  
Here

 X 5/10/14 ► TRUSTEE  
Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below (see instructions)?

Signature of preparer or trustee		Preparer's name	Date	Check <input type="checkbox"/> if self employed	PTIN
<b>Paid Preparer Use Only</b>	Print/Type preparer's name		Preparer's signature		
	CHARLES WILENSKY, CPA		CHARLES WILENSKY, CPA	5/5/14	P00075669
	Firm's name	► CLAIRMONT, PACIELLO & CO, P.C.			Firm's EIN ► 23-2324509
Firm's address	► 250 TANGLEWOOD LANE			Phone no	610-265-4122
	KING OF PRUSSIA, PA 19406-2365				

BAA

## Form 990-PF (2013)

## RODSTEIN FOUNDATION

23-6697762

**STATEMENT 1**  
**FORM 990-PF, PART I, LINE 16B**  
**ACCOUNTING FEES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CLAIRMONT, PACIELLO & CO., P.C.	\$ 1,180.	\$ 1,062.		\$ 118.
TOTAL	<u>\$ 1,180.</u>	<u>\$ 1,062.</u>		<u>\$ 118.</u>

**STATEMENT 2**  
**FORM 990-PF, PART I, LINE 18**  
**TAXES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
2011 FEDERAL EXCISE TAX PAID IN 2012	\$ 324.			
TOTAL	<u>\$ 324.</u>	<u>\$ 0.</u>		<u>\$ 0.</u>

**STATEMENT 3**  
**FORM 990-PF, PART II, LINE 13**  
**INVESTMENTS - OTHER**

	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
<u>OTHER SECURITIES</u>			
HARBOR INTERNATIONAL FUND	COST	\$ 36,805.	\$ 71,018.
VANGUARD TOTAL BOND MARKET INDEX FUND	COST	\$ 0.	\$ 0.
VANGUARD ENERGY FUND	COST	\$ 18,785.	\$ 38,283.
VANGUARD EXTENDED MARKET INDEX FUND	COST	\$ 21,388.	\$ 41,082.
VANGUARD 500 INDEX FUND	COST	\$ 15,899.	\$ 37,326.
DREYFUS MID CAP INDEX FUND	COST	\$ 40,244.	\$ 64,185.
TOTAL		<u>\$ 133,121.</u>	<u>\$ 251,894.</u>

**STATEMENT 4**  
**FORM 990-PF, PART III, LINE 3**  
**OTHER INCREASES**

PRIOR PERIOD ADJUSTMENTS

TOTAL	\$	<u>7.</u>
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## STATEMENT 5

## FORM 990-PF, PART IV, LINE 1

## CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	49.673 SHARES VANGUARD TOTAL BOND MKT INDEX FUND	PURCHASED	VARIOUS	12/16/2013
2	39.334 SHARES VANGUARD TOTAL BOND MKT INDEX FUND	PURCHASED	VARIOUS	12/16/2013
3	370.934 SHARES VANGUARD TOTAL BOND MKT INDEX FUND	PURCHASED	VARIOUS	12/16/2013
4	354.806 SHARES VANGUARD TOTAL BOND MKT INDEX FUND	PURCHASED	VARIOUS	12/16/2013
5	798.008 SHARES VANGUARD TOTAL BOND MKT INDEX FUND	PURCHASED	VARIOUS	12/16/2013
6	CAPITAL GAIN DIVIDENDS	PURCHASED	VARIOUS	12/16/2013

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	527.		545.	-18.				\$ -18.
2	417.		432.	-15.				-15.
3	3,936.		3,749.	187.				187.
4	3,764.		3,586.	178.				178.
5	8,467.		8,065.	402.				402.
6								2,706.
							TOTAL \$	<u>3,440.</u>

## STATEMENT 6

## FORM 990-PF, PART XV, LINE 2A-D

## APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM: RODSTEIN FOUNDATION  
 NAME: MARC RODSTEIN  
 CARE OF:  
 STREET ADDRESS: 15695 BOEING COURT  
 CITY, STATE, ZIP CODE: WELLINGTON, FL 33414-8359  
 TELEPHONE: (561) 948-1262  
 E-MAIL ADDRESS:  
 FORM AND CONTENT: REQUESTS WITH A WRITTEN STATEMENT AS TO THE INTENDED USE OF THE GRANT, A WRITTEN STATEMENT AS TO THE DEDUCTIBILITY OF CONTRIBUTIONS TO THE REQUESTING ORGANIZATION AND THE EXEMPT STATUS OF THE REQUESTING ORGANIZATION.

SUBMISSION DEADLINES: DECEMBER 1 ANNUALLY  
 RESTRICTIONS ON AWARDS: NONE

**STATEMENT 7**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
LAKES ENVIRONMENTAL ASSN. 230 MAIN STREET BRIDGTON, ME 04009	NONE	EXEMPT	CHARITABLE PURPOSES	\$ 250.
DEERTREES THEATRE FOUNDATION PO BOX 577 DEERTREES ROAD HARRISON, ME 04040	NONE	EXEMPT	CHARITABLE PURPOSES	200.
TRUSTEES OF UNIVERSITY OF PENNSYLVANIA 3451 WALNUT STREET PHILADELPHIA, PA 19104	NONE	EXEMPT	CHARITABLE PURPOSE	200.
AMERICANS UNITED FOR SEP OF CHURCH & ST 518 C STREET, NE WASHINGTON, DC 20002	NONE	EXEMPT	CHARITABLE PURPOSE	100.
ANTI-DEFAMATION LEAGUE-BNAI BRITH 2020 K STREET, NW, 7TH FLOOR WASHINGTON, DC 20006	NONE	EXEMPT	CHARITABLE PURPOSE	200.
ALZHEIMER'S ASSOCIATION 225 N. MICHIGAN AVENUE, FL. 17 CHICAGO, IL 60601	NONE	EXEMPT	CHARITABLE PURPOSE	50.
WPNT-TV 2, NATIONAL PUBLIC TELEVISION P.O. BOX 610002 MIAMI, FL 33261	NONE	EXEMPT	CHARITABLE PURPOSE	50.
AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVENUE DALLAS, TX 75231	NONE	EXEMPT	CHARITABLE PURPOSE	100.
JEWISH FEDERATION OF PALM BEACH COUNTY 4601 COMMUNITY DRIVE WEST PALM BEACH, FL 33417	NONE	EXEMPT	CHARITABLE PURPOSE	6,000.
THE AOPA FOUNDATION, INC 421 AVIATION WAY FREDERICK, MD 21701	NONE	EXEMPT	CHARITABLE PURPOSE	500.
HOSPICE BY THE SEA 1531 W. PALMETTO PARK ROAD BOCA RATON, FL 33486	NONE	EXEMPT	CHARITABLE PURPOSE	100.

## RODSTEIN FOUNDATION

23-6697762

**STATEMENT 7 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
CHABAD-LUBAVITCH 770 EASTERN PARKWAY, SUITE 405 BROOKLYN, NY 11213	NONE	EXEMPT	CHARITABLE	\$ 100.
BRANDEIS UNIVERSITY 415 SOUTH STREET WALTHAM, MA 02453	NONE	EXEMPT	CHARITABLE	75.
PARALYZED VETERANS OF AMERICA 3799 N ANDREWS AVENUE FT LAUDERDALE, FL 33309	NONE	EXEMPT	CHARITABLE	100.
TOTAL				\$ <u>8,025.</u>