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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ **Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.**

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

OMB No 1545-0052

2013

Open to Public Inspection

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

Name of foundation
WALDMAN FAMILY CHARITABLE TRUST

A Employer identification number
23-6869549

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

Room/suite

B Telephone number (see instructions)

City or town, state or province, country, and ZIP or foreign postal code
STOCKERTOWN, PA 18083

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)*▶$ 4,900,513

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) (see instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	107,268	107,268	107,268	
	5a	Gross rents				
	b	Net rental income or (loss) ________				
	6a	Net gain or (loss) from sale of assets not on line 10	28,653			
	b	Gross sales price for all assets on line 6a 798,884				
	7	Capital gain net income (from Part IV, line 2)		2,907		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	455		455	
	12	**Total.** Add lines 1 through 11	136,376	110,175	107,723	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	3,500	1,750		1,750
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	1,078	539		539
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	1,232	616		616
	24	**Total operating and administrative expenses.** Add lines 13 through 23	5,810	2,905		2,905
	25	Contributions, gifts, grants paid	128,100			128,100
	26	**Total expenses and disbursements.** Add lines 24 and 25	133,910	2,905		131,005
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	2,466			
	b	**Net investment income** (if negative, enter -0-)		107,270		
	c	**Adjusted net income** (if negative, enter -0-)			107,723	

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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	23,313	21,948	21,948
	2	Savings and temporary cash investments	786,282	845,050	845,050
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	2,745,121	3,036,824	3,637,634
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	712,916	366,276	395,881
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	4,267,632	4,270,098	4,900,513
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)		0	
Net Assets or Fund Balances		**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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	4,267,632	4,270,098	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	4,267,632	4,270,098	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	4,267,632	4,270,098	

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	4,267,632
2	Enter amount from Part I, line 27a	2	2,466
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	4,270,098
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	4,270,098

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				

	(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			(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				

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	2,907
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	140,184	4,171,822	0 033603
2011	130,125	4,254,444	0 030586
2010	178,525	4,335,648	0 041176
2009	130,581	3,332,169	0 039188
2008	103,800	2,127,922	0 048780

2	**Total** of line 1, column (d).	2	0 193333
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 038667
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	4,561,237
5	Multiply line 4 by line 3.	5	176,369
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,073
7	Add lines 5 and 6.	7	177,442
8	Enter qualifying distributions from Part XII, line 4.	8	131,005

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI **Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ 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	2,145
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	
3	Add lines 1 and 2	3	2,145
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	2,145
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013 — 6a: 2,259		
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	2,259
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	114
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ 114 **Refunded** ▶	11	

Part VII-A **Statements Regarding Activities**

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ________ **(2)** On foundation managers ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
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		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ ________			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

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

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

Website address ▶N/A

14 The books are in care of ▶TRUSTEES Telephone no ▶(610) 759-9550

Located at ▶110 COMMERCE WAY 110 COMMERCE WAY STOCKERTOWN PA ZIP+4 ▶18083

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 |

			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		No
	See instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶			

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

			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 page 20 of the instructions)?	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		
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 ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ 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.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	5b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
BRUCE WALDMAN 1646 COUNTRY ROAD 1646 COUNTRY ROAD BETHLEHEM, PA 180155717	TRUSTEE 0 75	0	0	0
JESSICA WALDMAN 380 HOPI PLACE 380 HOPI PLACE BOULDER, CO 80303	TRUSTEE 0 50	0	0	0
MARK WALDMAN 6415 MEETINGHOUSE ROAD 6415 MEETINGHOUSE ROAD NEW HOPE, PA 18938	TRUSTEE 0 75	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 ▶

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

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

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		
Total number of others receiving over $50,000 for professional services. . . . . ▶		

Part IX-A Summary of Direct Charitable Activities

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

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

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

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	3,620,831
b	Average of monthly cash balances	1b	1,009,866
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	4,630,697
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	4,630,697
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	69,460
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,561,237
6	**Minimum investment return.** Enter 5% of line 5	6	228,062

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	228,062
2a	Tax on investment income for 2013 from Part VI, line 5	2a	2,145		
b	Income tax for 2013 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	2,145
3	Distributable amount before adjustments Subtract line 2c from line 1			3	225,917
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	225,917
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	225,917

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	131,005
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	131,005
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	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	131,005

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				225,917
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			98,788	
b Total for prior years 20___, 20___, 20___				
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.				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 131,005				
a Applied to 2012, but not more than line 2a			98,788	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2013 distributable amount.				32,217
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 *(If an amount appears in column (d), the same amount must be shown in column (a).)*				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount —see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				193,700
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . .				
9 **Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a				
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)

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2013	**(b)** 2012	**(c)** 2011	**(d)** 2010	
2a 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 organization had $5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

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

HERMAN B WALDMAN DECEASED

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

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

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

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

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

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

Recipient 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 Additional Data Table				
Total . . . . ▶ **3a**				128,100
b *Approved for future payment*				
Total . . . . ▶ **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)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions)
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	107,268	
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			14	2,907	25,746
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a MISCELLANEOUS INCOME			14	455	
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				110,630	25,746

13 Total. Add line 12, columns (b), (d), and (e). **13** 136,376

(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) (See instructions)

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)**		No
(2) Other assets	**1a(2)**		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	**1b(1)**		No
(2) Purchases of assets from a noncharitable exempt organization	**1b(2)**		No
(3) Rental of facilities, equipment, or other assets	**1b(3)**		No
(4) Reimbursement arrangements	**1b(4)**		No
(5) Loans or loan guarantees	**1b(5)**		No
(6) Performance of services or membership or fundraising solicitations	**1b(6)**		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	**1c**		No

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

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

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 or fiduciary) is based on all information of which preparer has any knowledge

****** | 2014-05-01 | ******

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
MATTHEW B SEARLES CPA		2014-05-01		P00371853

Firm's name ▶ MILLER SEARLES BAHR & WILLSLLC		Firm's EIN ▶
Firm's address ▶ 5235 OAKVIEW DRIVE ALLENTOWN, PA 181049205		Phone no (610) 366-1400

Form 990PF Part XV Line 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*				
ALLIANCE EXCHANGE ALLIANCE EXCHANGE 31 KIDDER AVENUE 31 KIDDER AVENUE SOMERVILLE,MA 02144	NONE		UNRESTRICTED USE BY DONEE	1,600
AMERICAN FEDERATN FOR AIDS RESEARCH AMERICAN FEDERATION FOR AIDS RESEARCH 120 WALL STREET 120 WALL STREET NEW YORK,NY 10005	NONE		UNRESTRICTED USE BY DONEE	1,000
BIXBY SCHOOL BIXBY SCHOOL 4760 TABLE MESA DRIVE 4760 TABLE MESA DRIVE BOULDER,CO 80305	NONE		UNRESTRICTED USE BY DONEE	5,000
BUCKINGHAM FRIENDS SCHOOL BUCKINGHAM FRIENDS SCHOOL PO BOX 159 PO BOX 159 LAHASKA,PA 18931	NONE		UNRESTRICTED USE BY DONEE	2,500
CATALYST HIGH SCHOOL CATALYST HIGH SCHOOL 1376 MINERS DRIVE 1376 MINERS DRIVE LAFAYETTE,CO 80026	NONE		UNRESTRICTED USE BY DONEE	30,000
CHILDREN'S HOME OF EASTON CHILDREN'S HOME OF EASTON 2000 SOUTH 25TH STREET 2000 SOUTH 25TH STREET EASTON,PA 18042	NONE		UNRESTRICTED USE BY DONEE	3,000
CHILDREN'S HOSPITAL CO FOUNDATION CHILDREN'S HOSPITAL COLORADO FOUNDATION 13123 EAST 16TH AVENUE 13123 EAST 16TH AVENUE AURORA,CO 80045	NONE		UNRESTRICTED USE BY DONEE	1,500
CHILDREN'T HOSPITAL PA FOUNDATION CHILDREN'S HOSPITAL PHILADELPHIA FOUNDATION PO BOX 8500 PO BOX 8500 PHILADELPHIA,PA 191781352	NONE		UNRESTRICTED USE BY DONEE	1,000
COMMUNITY FOODBANK OF NEW JERSEY COMMUNITY FOODBANK OF NEW JERSEY 31 EVANS TERMINAL 31 EVANS TERMINAL HILLSIDE,NJ 07205	NONE		UNRESTRICTED USE BY DONEE	5,000
CONCORDIA UNIVERSITY CONCORDIA UNIVERSITY 2811 NE HOLMAN STREET 2811 NE HOLMAN STREET PORTLAND,OR 97211	NONE		UNRESTRICTED USE BY DONEE	2,000
COPPERBRIDGE FOUNDATION COPPERBRIDGE FOUNDATION 13149 WEST DIXIE HIGHWAY 13149 WEST DIXIE HIGHWAY NORTH MIAMI,FL 33161	NONE		UNRESTRICTED USE BY DONEE	2,500
CURE CITIZENS UNITED FOR RESEARCH IN EPILEPSY 223 WEST ERIE 223 WEST ERIE CHICAGO,IL 60654	NONE		UNRESTRICTED USE BY DONEE	3,000
THE GEORGE SCHOOL THE GEORGE SCHOOL PO BOX 4438 PO BOX 4438 NEWTOWN,PA 18940	NONE		UNRESTRICTED USE BY DONEE	1,000
HILLSIDE SCHOOL HILLSIDE SCHOOL 2697 BROOKSIDE ROAD 2697 BROOKSIDE ROAD MACUNGIE,PA 18062	NONE		UNRESTRICTED USE BY DONEE	2,000
JAZZ FOUNDATION OF AMERICA JAZZ FOUNDATION OF AMERICA 322 WEST 48TH STREET 322 WEST 48TH STREET NEW YORK,NY 10036	NONE		UNRESTRICTED USE BY DONEE	2,000
Total . . . . ▶ **3a**				128,100

Form 990PF Part XV Line 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*				
K S & A KLINEFELTER SYNDROME & ASSOCIATES PO BOX 872 PO BOX 872 PINE,CO 80470	NONE		UNRESTRICTED USE BY DONEE	1,500
LEHIGH VALLEY HOSPITAL LEHIGH VALLEY HOSPITAL 1247 S CEDAR CREST BLVD 1247 S CEDAR CREST BLVD ALLENTOWN,PA 18103	NONE		UNRESTRICTED USE BY DONEE	10,000
LEHIGH VALLEY SUMMERBRIDGE LEHIGH VALLEY SUMMERBRIDGE 4313 GREEN POND ROAD 4313 GREEN POND ROAD BETHLEHEM,PA 18017	NONE		UNRESTRICTED USE BY DONEE	1,500
MCEP MAASAI CULTURAL EXCHANGE PROJECT PO BOX 222 PO BOX 222 POINT PLEASANT,PA 18950	NONE		UNRESTRICTED USE BY DONEE	1,000
MAYO CLINIC JACKSONVILLE DEV OFFICE MAYO CLINIC JACKSONVILLE DEVELOPMENT OFFICE 4500 SAN PABLO ROAD 4500 SAN PABLO ROAD JACKSONVILLE,FL 32224	NONE		UNRESTRICTED USE BY DONEE	2,500
MEALS ON WHEELS MEALS ON WHEELS 4240 FRITCH DRIVE 4240 FRITCH DRIVE BETHLEHEM,PA 18020	NONE		UNRESTRICTED USE BY DONEE	1,000
MORAVIAN ACADEMY MORAVIAN ACADEMY 4313 GREEN POND ROAD 4313 GREEN POND ROAD BETHLEHEM,PA 18017	NONE		UNRESTRICTED USE BY DONEE	5,000
NEW HOPE LIBRARY NEW HOPE LIBRARY 93 WEST FERRY STREET 93 WEST FERRY STREET NEW HOPE,PA 18938	NONE		UNRESTRICTED USE BY DONEE	2,500
NEW JERSEY SEEDS NEW JERSEY SEEDS 494 BROAD STREET 494 BROAD STREET NEWARK,NJ 07102	NONE		UNRESTRICTED USE BY DONEE	1,000
NORWESCAP NORWESCAP 350 MARSHALL STREET 350 MARSHALL STREET PHILLIPSBURG,NJ 08865	NONE		UNRESTRICTED USE BY DONEE	5,000
NORTHAMPTON COMM COLL FDN NORTHAMPTON COMMUNITY COLLEGE FOUNDATION 3835 GREEN POND ROAD 3835 GREEN POND ROAD BETHLEHEM,PA 18020	NONE		UNRESTRICTED USE BY DONEE	12,500
NORTHWESTERN UNIVERSITY NORTHWESTERN UNIVERSITY WEINBERG COLLEGE OF ARTS 1922 SHERIDAN ROAD 1922 SHERIDAN ROAD EVANSTON,IL 60208	NONE		UNRESTRICTED USE BY DONEE	1,000
NYUMBANI CHILDREN OF GOD RELIEF FD NYUMBANI CHILDREN OF GOD RELIEF FUND INC 1001 PENNSYLVANIA AVENUE 1000 PENNSYLVANIA AVENUE WASHINGTON,DC 20004	NONE		UNRESTRICTED USE BY DONEE	2,000
PLANNED PARENTHOOD OF NE PA PLANNED PARENTHOOD OF NE PENNSYLVANIA PO BOX 813 PO BOX 813 TREXLERTOWN,PA 18087	NONE		UNRESTRICTED USE BY DONEE	1,000
PROJECT OF EASTON PROJECT OF EASTON 320 FERRY STREET 320 FERRY STREET EASTON,PA 18042	NONE		UNRESTRICTED USE BY DONEE	1,000
Total . . . . ▶ **3a**				128,100

Form 990PF Part XV Line 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*				
ROLLING HARVEST ROLLING HARVEST 3920 RIVER ROAD 3920 RIVER ROAD LUMBERVILLE,PA 18933	NONE		UNRESTRICTED USE BY DONEE	2,500
SAFE HARBOR EASTON INC SAFE HARBOR EASTON INC 536 BUSHKILL DRIVE 536 BUSHKILL DRIVE EASTON,PA 18042	NONE		UNRESTRICTED USE BY DONEE	500
STATE THEATRE STATE THEATRE 453 NORTHAMPTON STREET 453 NORTHAMPTON STREET EASTON,PA 18042	NONE		UNRESTRICTED USE BY DONEE	1,000
THIRD STREET ALLIANCE THIRD STREET ALLIANCE FOR WOMEN & CHILDREN 41 NORTH THIRD STREET 41 NORTH THIRD STREET EASTON,PA 18042	NONE		UNRESTRICTED USE BY DONEE	1,000
THOMAS SCATTERGOOD FOUNDATION THOMAS SCATTERGOOD FOUNDATION 1501 CHERRY STREET 1501 CHERRY STREET PHILADELPHIA,PA 19102	NONE		UNRESTRICTED USE BY DONEE	1,000
TRINITY CHURCH TRINITY CHURCH PO BOX 377 PO BOX 377 SOLEBURY,PA 18963	NONE		UNRESTRICTED USE BY DONEE	4,000
TRUSTEES OF THE UNIVERSITY OF PA TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA 3733 SPRUCE STREET 3733 SPRUCE STREET PHILADELPHIA,PA 191046360	NONE		UNRESTRICTED USE BY DONEE	1,000
UNITED FRIENDS SCHOOL UNITED FRIENDS SCHOOL 1018 WEST BROAD STREET 1018 WEST BROAD STREET QUAKERTOWN,PA 18951	NONE		UNRESTRICTED USE BY DONEE	500
UNITED NEGRO COLLEGE FUND UNITED NEGRO COLLEGE FUND 718 ARCH STREET 718 ARCH STREET PHILADELPHIA,PA 19106	NONE		UNRESTRICTED USE BY DONEE	1,000
VISITING NURSES ASSOC OF ST LUKES VISITING NURSES ASSOC OF ST LUKES 1510 VALLEY CTER PARKWAY 1510 VALLEY CENTR PARKWAY BETHLEHEM,PA 18017	NONE		UNRESTRICTED USE BY DONEE	1,000
WELLER CENTER FOR HEALTH EDUCATION WELLER CENTER FOR HEALTH EDUCATION 325 NORTHAMPTON STREET 325 NORTHAMPTON STREET EASTON,PA 18042	NONE		UNRESTRICTED USE BY DONEE	1,000
WORD UP COMMUNITY BOOKSHOP WORD UP COMMUNITY BOOKSHOP 2113 AMSTERDAM AVE 2113 AMSTERDAM AVE NEW YORK,NY 10032	NONE		UNRESTRICTED USE BY DONEE	2,000
Total . . . . ▶ **3a**				128,100

TY 2013 Accounting Fees Schedule

Name: WALDMAN FAMILY CHARITABLE TRUST

EIN: 23-6869549

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	3,500	1,750		1,750

TY 2013 Compensation Explanation

Name: WALDMAN FAMILY CHARITABLE TRUST

EIN: 23-6869549

Person Name	Explanation
BRUCE WALDMAN	
JESSICA WALDMAN	
MARK WALDMAN	

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2013 Gain/Loss from Sale of Other Assets Schedule

Name: WALDMAN FAMILY CHARITABLE TRUST

EIN: 23-6869549

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
1,153 355 SHS PIMCO MOD DURATION INS	2012-07	PURCHASE	2013-06		12,145	12,630			-485	
18 595 SHS UIL HLDGS CORP	2013-04	PURCHASE	2013-06		688	688				
1,986 378 VANGUARD HI YLD CORP INV	2012-07	PURCHASE	2013-06		11,680	12,033			-353	
7 677 SHS WELLS FARGO ADV FD LG GR	2012-12	PURCHASE	2013-08		312	260			52	
ISHARES SILVER TRUST	2013-12	PURCHASE	2013-12		207	207				
SPARTAN STORES INC	2013-11	PURCHASE	2013-11		21				21	
289 375 SHS PIMCO MOD DURATION INST	2012-01	PURCHASE	2013-06		3,047	3,116			-69	
1,700 00 SHS UIL HLDGS CORP	2011-03	PURCHASE	2013-06		62,922	50,050			12,872	
1,048 121 SHS VANGUARD HI YLD CORP I	2012-01	PURCHASE	2013-06		6,163	6,094			69	
4 686 SHS WELLS FARGO ADV FD LG GR	2012-06	PURCHASE	2013-08		190	153			37	
1,000 00 SHS BCE INC NEW	2010-04	PURCHASE	2013-06		38,565	30,447			8,118	
9,956 00 SHS EVER GLORY INTL NEW	2010-08	PURCHASE	2013-07		27,814	25,381			2,433	
1,016 00 SHS NUCOR CORPORATION	1997-01	PURCHASE	2013-06		43,821	13,424			30,397	
21,392 378 SHS PIMCO MOD DURATION IN	2011-10	PURCHASE	2013-06		225,262	217,061			8,201	
31,252 812 SHS VANGUARD HI YLD CORP	2010-12	PURCHASE	2013-06		183,767	228,345			-44,578	
2,735 00 SHS WEINGARTEN REALTY INV S	1997-06	PURCHASE	2013-06		81,078	53,047			28,031	
2,420 623 SHS WELLS FARGO ADV FD LG	2003-06	PURCHASE	2013-08		98,295	117,295			-19,000	

TY 2013 Investments Corporate Stock Schedule

Name: WALDMAN FAMILY CHARITABLE TRUST

EIN: 23-6869549

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	3,036,824	3,637,634

TY 2013 Investments - Other Schedule

Name: WALDMAN FAMILY CHARITABLE TRUST

EIN: 23-6869549

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BOND MUTUAL FUND	FMV	239,784	263,308
COMMON TRUST FUNDS	FMV		
INVESTMENT	AT COST	75,000	75,853
MUTUAL FUNDS	FMV	51,492	56,720

TY 2013 Other Expenses Schedule

Name: WALDMAN FAMILY CHARITABLE TRUST

EIN: 23-6869549

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
MISCELLANEOUS EXPENSES	1,232	616		616

TY 2013 Other Income Schedule

Name: WALDMAN FAMILY CHARITABLE TRUST

EIN: 23-6869549

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS INCOME	455		455

TY 2013 Taxes Schedule

Name: WALDMAN FAMILY CHARITABLE TRUST

EIN: 23-6869549

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	1,078	539		539