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Return of Private Foundation

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

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

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation ROBERT SALIGMAN CHARITABLE TRUST		A Employer identification number 23-6875203
Number and street (or P.O. box number if mail is not delivered to street address) C/O ISDANER 3 BALA PLAZA STE 501 WEST	Room/suite	B Telephone number 610-324-5500
City or town, state or province, country, and ZIP or foreign postal code BALA CYNWYD, PA 19004		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☒ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1 Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 16,806,050.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		11.	11.		STATEMENT 1
4 Dividends and interest from securities		272,606.	272,606.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<13,570.>			
b Gross sales price for all assets on line 6a		2,095,053.			
7 Capital gain net income (from Part IV, line 2)			0.		
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		11,824.	11,824.		STATEMENT 3
12 Total. Add lines 1 through 11		270,871.	284,441.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees		5,391.	2,695.		2,696.
c Other professional fees		46,977.	46,977.		0.
17 Interest					
18 Taxes		4,899.	1,106.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses		36.	18.		18.
24 Total operating and administrative expenses. Add lines 13 through 23		57,303.	50,796.		2,714.
25 Contributions, gifts, grants paid		719,588.			719,588.
26 Total expenses and disbursements. Add lines 24 and 25		776,891.	50,796.		722,302.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<506,020.>			
b Net investment income (if negative, enter -0-)			233,645.		
c Adjusted net income (if negative, enter -0-)				N/A	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	10,902.	62,985.	62,985.
	2 Savings and temporary cash investments	416,386.	104,725.	104,725.
	3 Accounts receivable 2,620.			
	Less: allowance for doubtful accounts 2,620.	12,255.	2,620.	2,620.
	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 STMT 8	1,090,499.	1,024,065.	1,042,053.
	b Investments - corporate stock STMT 9	5,808,003.	5,329,270.	8,614,012.
	c Investments - corporate bonds STMT 10	1,259,177.	1,083,645.	1,093,149.
	11 Investments - land, buildings, and equipment basis			
	Less: accumulated depreciation			
	12 Investments - mortgage loans			
	13 Investments - other STMT 11	4,149,313.	4,633,205.	5,886,506.
	14 Land, buildings, and equipment: basis			
	Less: accumulated depreciation			
	15 Other assets (describe STMT 11)			
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	12,746,535.	12,240,515.	16,806,050.
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 STMT 11)			
	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	4,269,538.	4,269,538.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	8,476,997.	7,970,977.	
	30 Total net assets or fund balances	12,746,535.	12,240,515.	
	31 Total liabilities and net assets/fund balances	12,746,535.	12,240,515.	

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 12,746,535.
2 Enter amount from Part I, line 27a	2 <506,020.>
3 Other increases not included in line 2 (itemize) STMT 11	3 0.
4 Add lines 1, 2, and 3	4 12,240,515.
5 Decreases not included in line 2 (itemize) STMT 11	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 12,240,515.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b SEE ATTACHED STATEMENT				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e 2,095,053.		2,139,133.	<13,570.>	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e			<13,570.>	
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 <13,570.>
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	504,609.	14,626,856.	.034499
2011	600,836.	14,534,120.	.041340
2010	787,154.	13,979,863.	.056306
2009	620,428.	12,886,410.	.048146
2008	536,073.	15,512,014.	.034559
2 Total of line 1, column (d)			2 .214850
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 .042970
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			4 15,815,135.
5 Multiply line 4 by line 3			5 679,576.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 2,336.
7 Add lines 5 and 6			7 681,912.
8 Enter qualifying distributions from Part XII, line 4			8 722,302.

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)		1	2,336.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b).		3	2,336.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	2,336.
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:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a 6,520.		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c 3,480.		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d		7	10,000.
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	7,664.
11 Enter the amount of line 10 to be Credited to 2014 estimated tax	7,664. 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) 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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	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 ► N/A

14 The books are in care of ► ISDANER & COMPANY, LLC Telephone no. ► 610-668-4200
 Located at ► 3 BALA PLAZA, SUITE 501 WEST, BALA CYNWYD, PA ZIP+4 ► 19004

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A

16 At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? ☐ Yes ☒ No
 See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	<u>N/A</u>	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?		1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?	☐ 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.)	<u>N/A</u>	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)	<u>N/A</u>	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?		4b X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ALICE SALIGMAN	TRUSTEE			
ISDANER & CO 3 BALA PLAZA STE 501 W				
BALA CYNWYD, PA 19004	0.00	0.	0.	0.
CAROLYN SALIGMAN	TRUSTEE			
ISDANER & CO 3 BALA PLAZA STE 501 W				
BALA CYNWYD, PA 19004	0.00	0.	0.	0.
IRA SALIGMAN	TRUSTEE			
ISDANER & CO 3 BALA PLAZA STE 501 W				
BALA CYNWYD, PA 19004	0.00	0.	0.	0.
LAURY SALIGMAN	TRUSTEE			
ISDANER & CO 3 BALA PLAZA STE 501 W				
BALA CYNWYD, PA 19004	0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

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

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

0

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Part 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
NONE		

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 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	10,440,088.
b	Average of monthly cash balances	1b	312,795.
c	Fair market value of all other assets	1c	5,303,092.
d	Total (add lines 1a, b, and c)	1d	16,055,975.
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	16,055,975.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	240,840.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	15,815,135.
6	Minimum investment return. Enter 5% of line 5	6	790,757.

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	790,757.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	2,336.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,336.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	788,421.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	788,421.
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	788,421.

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	722,302.
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	722,302.
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	2,336.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	719,966.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				788,421.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			697,487.	
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: ▶ \$ 722,302.				
a Applied to 2012, but not more than line 2a			697,487.	
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				24,815.
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				763,606.
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 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				
SCHEDULE ATTACHED		PUBLIC CHARITY	GENERAL FUND	719,588.
Total			▶ 3a	719,588.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

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 | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here	Under penalties of perjury, I declare that I 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.				May the IRS discuss this return with the preparer shown below (see instr.)? ☒ Yes ☐ No	
	Signature of officer or trustee <i>[Signature]</i>		Date <i>11/6/14</i>	Title <i>TRUSTEE</i>		
Paid Preparer Use Only	Print/Type preparer's name JONATHAN HOFFMAN, CPA		Preparer's signature <i>[Signature]</i>	Date <i>10/31/14</i>	Check ☐ if self-employed	PTIN P00236442
	Firm's name ▶ ISDANER & COMPANY, LLC				Firm's EIN ▶ 23-6410283	
	Firm's address ▶ THREE BALA PLAZA, SUITE 501 WEST BALA CYNWYD, PA 19004-3484				Phone no. (610) 668-4200	

Form **990-PF** (2013)

ROBERT SALIGMAN CHARITABLE TRUST

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 SEE SCHEDULE ATTACHED	P		
b SEE SCHEDULE ATTACHED	P		
c 2,124 SHS. ISHARES RUSSELL 1000 INDEX FUND	P		10/01/13
d WARBURG PINCUS: LITIGATION PROCEEDS	P		
e CLASS ACTION PROCEEDS	P		
f PLEIADES OFFSHORE LTD	P		06/28/13
g VERITABLE GLOBALE EVENT DRIVEN STRATEGY LP	P		
h VERITABLE AV PARTNERS LP			
i VERITABLE LONG BIASED DOMESTIC FUND LP			
j POWERSHARES DB COMMODITY INDEX TRACKING FUND			
k CAPITAL GAINS DIVIDENDS			
l			
m			
n			
o			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 108,221.		109,505.	<1,284.>
b 1,070,061.		1,324,438.	<254,377.>
c 201,073.		123,907.	77,166.
d 163.			163.
e 356.			356.
f 700,000.		573,159.	126,841.
g 8,147.		8,124.	23.
h			13,295.
i			15,388.
j			1,827.
k 7,032.			7,032.
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<1,284.>
b			<254,377.>
c			77,166.
d			163.
e			356.
f			126,841.
g			23.
h			13,295.
i			15,388.
j			1,827.
k			7,032.
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	<13,570.>
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

ROBERT SALIGMAN CHAR FDN CUST
Schedule D Detail of Short-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
100000. FEDERAL HOME LOAN BANK					
STRUCT NTS CALL 12/05/13 @	08/07/2013	12/05/2013	100,000.00	100,000.00	NONE
500.274 PIMCO COMMODITY					
REALRETURN STRATEGY FUND	06/20/2013	11/13/2013	2,761.51	2,873.15	-111.64
989.061 PIMCO COMMODITY					
REALRETURN STRATEGY FUND	12/12/2012	11/13/2013	5,459.62	6,631.55	-1,171.93
Totals			108,221.00	109,505.00	-1,284.00

ROBERT SALIGMAN CHAR FDN CUST

Totals

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
JP MORGAN CHASE & CO	3.	3.	
PNC BANK, N.A.	8.	8.	
TOTAL TO PART I, LINE 3	11.	11.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CYNWYD INVESTMENTS	1.	0.	1.	1.	
ISRAEL BONDS	62.	0.	62.	62.	
J.P. MORGAN CHASE	100,612.	0.	100,612.	100,612.	
PNC BANK N.A.	162,400.	7,032.	155,368.	155,368.	
POWERSHARES DB COMMODITY INDEX TRACKING FUND	9.	0.	9.	9.	
VERITABLE AV PARTNERS	11,333.	0.	11,333.	11,333.	
VERITABLE LONG BIASED DOMESTIC FUND LP	5,221.	0.	5,221.	5,221.	
TO PART I, LINE 4	279,638.	7,032.	272,606.	272,606.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CYNWYD INVESTMENTS	23,661.	23,661.	
VERITABLE AV PARTNERS	<6,405.>	<6,405.>	
VERITABLE LONG BIASED DOMESTIC FUND, LP	<5,209.>	<5,209.>	
POWERSHARES DB COMMODITY INDEX TRACKING FUND	<223.>	<223.>	
TOTAL TO FORM 990-PF, PART I, LINE 11	11,824.	11,824.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ISDANER & CO, LLC	5,391.	2,695.		2,696.
TO FORM 990-PF, PG 1, LN 16B	5,391.	2,695.		2,696.

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
INVESTMENT FEES	46,977.	46,977.		0.
TO FORM 990-PF, PG 1, LN 16C	46,977.	46,977.		0.

FORM 990-PF	TAXES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	1,106.	1,106.		0.
FEDERAL EXCISE TAX	3,793.	0.		0.
TO FORM 990-PF, PG 1, LN 18	4,899.	1,106.		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
BANK FEES	36.	18.		18.
TO FORM 990-PF, PG 1, LN 23	36.	18.		18.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
MUNICIPAL BONDS-SEE SCHEDULE ATTACHED		X	1,024,065.	1,042,053.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			1,024,065.	1,042,053.
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,024,065.	1,042,053.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITY INVESTMENTS-SCHEDULE ATTACHED	5,329,270.	8,614,012.
TOTAL TO FORM 990-PF, PART II, LINE 10B	5,329,270.	8,614,012.

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
STATE OF ISRAEL BONDS	202,000.	201,674.
CORPORATE BONDS- SEE SCHEDULE ATTACHED	881,645.	891,475.
TOTAL TO FORM 990-PF, PART II, LINE 10C	1,083,645.	1,093,149.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CYNWYD INVESTMENTS	COST	<112,815.>	79,524.
PLEIADES OFFSHORE LTD	COST	426,841.	576,044.
VITTORIA OFFSHORE LTD	COST	3,100,000.	3,907,480.
VERITABLE AV PARTNERS LP	COST	190,558.	206,332.
POWERSHARES DB COMMODITY INDEX TRACKING FUND	COST	313,232.	316,259.

Robert Saligman Charitable Trust
 EIN: 23-6875203
 Form 990-PF, Part II, Line 10a

Municipal Bonds

Valuation Method for Book Value	Description of Investment	Ending Book Balance	FMV at Year-End
cost	\$100,000 Alamo TX 1 538% 11/1/16	100,000 00	99,641 00
cost	\$100,000 Baltimore County MD GO NC 3 125% Due 11/1/14	100,182 99	102,460 00
cost	\$125,000 Berks County PA GO NC 4 64% Due 11/15/18	125,000.00	135,182 50
cost	\$100,000 Camdenton MO Reorg Sch Dist 3 35% Due 3/1/22	100,000 00	99,456 00
cost	\$50,000 La Joya TX Indep Sch Dist 0% Due 2/15/18	44,621 50	45,007 00
cost	\$25,000 Maine St Muni Bond Bank Liquor 1 708% Due 6/1/2016	25,000 00	25,115 75
cost	\$75,000 Metro Wastewtr Reclamation Build America 4 718% Due 4/1/2019	83,813 46	82,187 25
cost	\$50,000 Nassau Cnty Ny Interim Fin Aut 2 822% Due 11/15/23	45,873 00	44,686 50
cost	\$100,000 New Hampshire ST GO NC 4.5% Due 3/1/19	101,003 73	108,476 00
cost	\$50,000 New York City NY Transitional Future 4 85% Due 5/1/19	54,885 93	54,218 50
cost	\$100,000 Norwood Mass Taxable Mun 4% Due 8/15/15	102,441 32	104,072 00
cost	\$70,000 Snohomish Cnty WA Recovery Z GO 4 062% Due 12/1/20	72,639 04	72,006 20
cost	\$75,000 Washington ST Cops St Agy Per 1 45% Due 7/1/2019	68,604 00	69,544 50
Total		1,024,064.97	1,042,053.20

Robert Saligman Charitable Trust
 EIN: 23-6875203
 Form 990-PF, Part II, Line 10b

Mutual Funds

Valuation Method for Book Value	Description of Investment	Ending Book Balance	FMV at Year-End
cost	1,290 Shs Ishares Iboxx Investment Grade Corp Bond Fund	150,215.97	147,302.52
cost	10,152.059 Shs Blackrock Fund Floating Rate Income Portfolio	105,217.89	106,698.14
cost	1,285 Shs. Ishares Global Telecom	75,668.92	87,779.64
cost	8,140 Shs. Ishares Russell 2000 Index	496,947.00	939,030.40
cost	1,425 Shs. SPDR S&P Dividend	75,385.54	103,483.50
cost	2,375 Shs. Sector SPDR Tr	75,027.85	90,178.75
cost	1,733 Shs. Vanguard High Dividend Yield	75,295.23	108,000.56
cost	1,240 Shs. Vanguard FTSE Emerging Markets ETF	50,023.00	51,013.60
cost	968 Shs. Wisdomtree Emerging Markets Equity Inc Fund	49,959.88	49,397.04
cost	25,101.722 Shs Cohen & Steers Intern Rlty	270,612.45	286,159.63
cost	2,687.708 Shs. DFA Emerg Mkts Core Equity	50,649.62	52,302.80
cost	19,736.35 Shs. ING Realty Shares Portfolio-Class I	205,954.66	342,228.31
cost	3,219.254 Shs. Vanguard Energy Fund-Admiral	344,060.58	406,784.94
cost	56,641 Shs Ishares Russell 1000 Index	3,304,250.98	5,843,651.97
Total		5,329,269.57	8,614,011.80

Robert Saligman Charitable Trust
 EIN: 23-6875203
 Form 990-PF, Part II, Line 10c

Corporate Bonds

Valuation Method for Book Value	Description of Investment	Ending Book Balance	FMV at Year-End
cost	\$85,000 Coca Cola Co 3 3% 9/1/21	88,700.90	85,136.00
cost	\$50,000 GlaxoSmithKline Cap Inc 5.65% Due 5/15/18	54,275 00	57,557 00
cost	\$50,000 JP Morgan Chase & Co 6% Due 1/15/18	55,463.00	57,574 00
cost	\$50,000 Johnson & Johnson 5.15% Due 7/15/18	54,743 00	56,895 00
cost	\$50,000 Pepsico Inc 4.5% 1/15/20	57,614.50	54,382.00
cost	\$125,000 Procter & Gamble Inc 4.85% Due 12/15/15	138,503.75	135,197.50
cost	\$75,000 Stanford Univerasity Bnds 4.75% Due 5/1/19	80,635.50	84,292.50
cost	\$75,000 Target Corp Sr unsecured 4 875% Due 5/15/18	78,791.25	83,552.25
cost	\$50,000 United Technologies Corp 5.375% Due 12/15/17	56,125.50	56,978 00
cost	\$50,000 Vanderbilt University 5.25% Due 4/1/19	53,958 00	56,489 00
cost	\$100,000 Wal-Mart Stores 4 5% Due 7/1/15	108,021.00	106,112.00
cost	\$50,000 Wells Fargo Company 5 625% Due 12/11/17	54,813 50	57,310.00
Total		881,644.90	891,475.25

ROBERT SALIGMAN CHARITABLE TRUST

23-6875203

VERITABLE LONG BIASED DOMESTIC FUND

COST

715,389.

800,867.

TOTAL TO FORM 990-PF, PART II, LINE 13

4,633,205.

5,886,506.

Robert Saligman Charitable Foundation
990-PF, Part V, Line 3a
Grants & Contributions Paid

Name & Address	Relationship	Status	Purpose	Amount
Abramson Center for Jewish Life North Wales PA	NONE		General Fund	\$ 12 500
ALS of Greater Philadelphia Ambler PA	NONE		General Fund	\$ 2 000
Anti Defamation League Philadelphia PA	NONE		General Fund	\$ 5 000
Beth Jacob Synagogue Montpelier VT	NONE		General Fund	\$ 10 000
Camp Gan Israel Wynnewood, PA	NONE		General Fund	\$ 9 500
Carnegie Hall Patrons New York NY	NONE		General Fund	\$ 2 500
Chabad Lubavitch of Idaho Boise, ID	NONE		General Fund	\$ 1 800
Concern Worldwide USA New York, NY	NONE		General Fund	\$ 2 500
Federation Housing Philadelphia PA	NONE		General Fund	\$ 25 000
Golden Slipper of the Main Line Wynnewood, PA	NONE		General Fund	\$ 5 000
Jack M Barrack Hebrew Academy Bryn Mawr PA	NONE		General Fund	\$ 100 000
Jewish Learning Venture Melrose Park PA	NONE		General Fund	\$ 10 000
JEVS Human Services Philadelphia PA	NONE		General Fund	\$ 2 500
Jefferson Hospital Foundation Philadelphia, PA	NONE		General Fund	\$ 25 000
Jewish Federation of Greater Philadelphia Philadelphia, PA	NONE		General Fund	\$ 192 500
Jewish Relief Agency Bala Cynwyd, PA	NONE		General Fund	\$ 2 000
Lubavitch of Bucks County Newtown PA	NONE		General Fund	\$ 3 000
Metropolitan Museum of Art New York NY	NONE		General Fund	\$ 3 838
Mural Arts Advocates Philadelphia PA	NONE		General Fund	\$ 5 000
National Museum of Jewish History Philadelphia, PA	NONE		General Fund	\$ 15 000
North Branch Nature Center Montpelier, VT	NONE		General Fund	\$ 30 000
Nurturing Minds Inc Valley Forge PA	NONE		General Fund	\$ 45 000
OROT Melrose Park PA	NONE		General Fund	\$ 1 800
Philadelphia Museum of Art Philadelphia, PA	NONE		General Fund	\$ 1,000
Robert Saligman Middle School Melrose Park, PA	NONE		General Fund	\$ 100 000
University of Pennsylvania School of Nursing Philadelphia, PA	NONE		General Fund	\$ 45 150
Society Hill Synagogue Philadelphia PA	NONE		General Fund	\$ 50 000
Temple Beth Achim Philadelphia, PA	NONE		General Fund	\$ 6 000
The Jewish Museum New York, NY	NONE		General Fund	\$ 1 000
Yearning For Learning for Jewish Studies Montpelier VT	NONE		General Fund	\$ 5 000
Total				\$ 719,588