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Form **990-PF**

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.

OMB No 1545-0052

Department of the Treasury Internal Revenue Service

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

For	cale	ndar year 2013 or tax year l	beginning			, and e	nding		
		f foundation				-		A Employer identification	n number
		LIAM E. & TH		BF	RT MEMORIA	.		23-695699	4
_		OLARSHIP TRU					Room/suite		<u> </u>
		JEAN MACFAD			•		Hoom/suite	B Telephone number 610-363-03	245
_		own, state or province, cour							
	-	T CHESTER, P.		JUSIA	i code			C If exemption application is	pending, check here
			Initial return	Γ	Initial return of a fo	ormer nublic c	harity	D 1. Foreign organization	ns check here
•	01100		Final return	Ĭ	Amended return	onnoi paono o	···u····y	1. Torongin organization	10, 0110011 11010
			Address change	Ī	Name change			Foreign organizations or check here and attach of	neeting the 85% test,
H	Chec		X Section 501(c)(3) ex	xemp				E If private foundation st	
	_	ection 4947(a)(1) nonexemp			er taxable private found:	ation		under section 507(b)(1	_
I F	air m	arket value of all assets at er	nd of year J Account	ıng n	nethod X Cash	Accr	ual	F If the foundation is in a	60-month termination
(from	Part II, col (c), line 16)			(specify)			under section 507(b)(
1	▶\$,820 . (Part I, colu	ımn	(d) must be on cash	basis)			· · · · · · · · · · · · · · · · · · ·
P	art	Analysis of Revenue and (The total of amounts in column	Expenses		(a) Revenue and	(b) Net in		(c) Adjusted net	(d) Disbursements for chantable purposes
	 -	necessarily equal the amounts	s in column (a))	1_	expenses per books	inco	me 	income	(cash basis only)
	1				······································			N/A	
	2	Check X If the foundation		-	073		872.		Criamananan 1
	3	Interest on savings and tempor cash investments		<u> </u>	872. 37,420.		7,420.		STATEMENT 1 STATEMENT 2
	4	Dividends and interest from	n securities		37,420.	3	7,420.		SIAIEMENI Z
		Gross rents		-					-
	_ [Net rental income or (loss) Net gain or (loss) from sale of as			<2,375.	>			
ءِ ہ⊱َ۔	3 3	Gross sales price for all	57,878.				······································		
2014 Revenue	7	assets on line 6a Capital gain net income (from P					0.	,	
% 2014 Revenu	8	Net short-term capital gain	I						
N	9	Income modifications							,
≥:	108	Gross sales less returns and allowances							
	t	Less Cost of goods sold		ļ			,,,,		
<u> </u>	1	Gross profit or (loss)							
	11	Other income		<u> </u>	25 017	2.	8,292.		
<u></u>	12	Total. Add lines 1 through			35,917. 12,625.		2,525.		10,100.
	13	Other employee salaries on		片	12,023.	•	2,323.		10,100.
TC .	15	Other employee-salaries-an Pension plans, employee b	CENTE IVED	H					-
S	162	Legal fees	STMT 3	婛	575.		375.	-	200.
S L		_ [W]	10/ 10/ 2010	IRS-OS	-				
Exp	1	Other professional Gees	MAY 1 9 2014	S					
<u>8</u>	17	Interest							
and Administrative Expens	18	Taxes	GDSTMT LAT	<u> </u>	126.		126.		0.
Sign	19	Depreciation and depletion	ı	<u> </u>					
Ē	20	Occupancy		<u> </u>					-
Ą	21	Travel, conferences, and m	reetings				- 		
Ę	22	Printing and publications	STMT 5		904.		105.		105.
ţ	23	Other expenses Total operating and admir			704.		103.		103.
Operating	24	expenses. Add lines 13 th			14,230.	:	3,131.		10,405.
Ö	25	Contributions, gifts, grants	•	 	29,500.				29,500.
	26	Total expenses and disbu							
	1	Add lines 24 and 25			43,730.	<u> </u>	3,131.		39,905.
	27	Subtract line 26 from line 1	12						
	8	Excess of revenue over expense	es and disbursements		<7,813.			,	
		Net investment income (if		ļ		3!	5,161.	77.7	
200		Adjusted net income (if nec	gative, enter -0-)	<u> </u>				N/A	1

323501 10-10-13 LHA For Paperwork Reduction Act Notice, see instructions.

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Fo	rm 99	OO-PF (2013) SCHOLARSHIP TRUST		23-6	5956994 Page 2
		Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	year
	art	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	625.	24.	24.
	2	Savings and temporary cash investments	175,951.	198,392.	198,392.
	3	Accounts receivable		· · · · · · · · · · · · · · · · · · ·	
		Less allowance for doubtful accounts		İ	
	4	Pledges receivable			
	•	Less allowance for doubtful accounts		j	
	5	Grants receivable			
	٦	Receivables due from officers, directors, trustees, and other			
	"	disqualified persons			
	,	· · · ·			······································
	'	Other notes and loans receivable		1	
		Less allowance for doubtful accounts			
Assets	8	Inventories for sale or use			
Ass	9	Prepaid expenses and deferred charges			
•	1	Investments - U.S. and state government obligations	707 255	766 200	1 214 605
		Investments - corporate stock STMT 6	787,355.	766,389.	1,214,695.
	C	Investments - corporate bonds			
	11	Investments - land, buildings and equipment basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 7	152,196.	141,573.	146,709.
	14	Land, buildings, and equipment basis			
		Less accumulated depreciation			
	15	Other assets (describe)			
	16	Total assets (to be completed by all filers - see the			
		instructions Also, see page 1, item 1)	1,116,127.	1,106,378.	1,559,820.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
s	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
abil	21	Mortgages and other notes payable			
Ë	22	Other liabilities (describe			
		- Chief Habilities (2000) 100			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
	-0-	Foundations that follow SFAS 117, check here			
		and complete lines 24 through 26 and lines 30 and 31.			
es	24	Unrestricted			
Net Assets or Fund Balances	24				,
Sala	25	Temporarily restricted			
Ā	26	Permanently restricted Foundations that do not follow SFAS 117, check here			
٦					
<u>-</u> 0	l	and complete lines 27 through 31.	1,094,899.	1,087,086.	
ts	27	Capital stock, trust principal, or current funds	0.	0.	
SS	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
Ϋ́	29	Retained earnings, accumulated income, endowment, or other funds			
ž	30	Total net assets or fund balances	1,094,899.	1,087,086.	
			1 004 000	1 007 006	
_	31	Total liabilities and net assets/fund balances	1,094,899.	1,087,086.	
F	art	Analysis of Changes in Net Assets or Fund Ba	lances		
1	Total	net assets or fund balances at beginning of year - Part II, column (a), line 3	0		
		st agree with end-of-year figure reported on prior year's return)		1	1,094,899.
2	•	r amount from Part I, line 27a		2	1,094,899. <7,813.>
		r increases not included in line 2 (itemize)		3	0.
		lines 1, 2, and 3		4	1,087,086.
		eases not included in line 2 (itemize)		5	0.
		I net assets or fund balances at end of year (line 4 minus line 5) - Part II. col	umn (b), line 30	6	1,087,086.

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——————————————————————————————————————	and Losses for lax on in		t income	T (EX LITE			
(a) List and desc 2-story brick wa	ribe the kind(s) of property sold (e g arehouse, or common stock, 200 shs	, real estate, s MLC Co)		(D) H0	w acquired Purchase Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a \$40,000 AURORA	BANK CD			╁	P	03/02/11	03/11/13
b 1,000 SHS DE M					P	02/03/05	02/26/13
c 200 SHS HILLSH	IRE BRANDS COMPA	NY			P	02/03/05	02/26/13
d			- -				
<u>e</u>				<u> </u>			<u> </u>
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale			(h) Gain or (los: (e) plus (f) minus	
a 40,000.			40,00				0.
b 11,581.			14,01				<2,432.
c 6,297.			6,24	10.			57.
d				_			
<u>e</u>			10101100				
Complete only for assets showing	ng gain in column (h) and owned by	 				(I) Gains (Col. (h) gair of (k), but not less tha	
(I) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col (i) col (j), if any		. <u>. </u>	Losses (from col	
<u>a</u>				_			0.
<u>b</u>							<2,432.
С							57.
d					·		
е		L					
2 Capital gain net income or (net ca	If gain, also enter Ipital loss) { If (loss), enter -0:	n Part I, line In Part I, line	7 7	}	2		<2,375.
3 Net short-term capital gain or (los	ss) as defined in sections 1222(5) an	ıd (6)					
If gain, also enter in Part I, line 8,		, ,			ļ	/-	
If (loss), enter -0- in Part I, line 8			· 		3	N/A	<u> </u>
<u> </u>	nder Section 4940(e) for			-	stment in	come	
(For optional use by domestic private	e foundations subject to the section 4	1940(a) tax on	net investment in	icome)			
If section 4940(d)(2) applies, leave the	nis part blank						
							X Yes No
Was the foundation liable for the sect			•	LIOQ >			X Yes No
1 Enter the appropriate amount in 6	each column for each year, see the in			ntries			
(a)	(b)	iotractiono bo	toro making any c	(c)			(d)
Base periód years Calendar year (or tax year beginnii		tributions	Net value of no		ible-use asset		bution ratio vided by col. (c))
2012						· · · · · · · · · · · · · · · ·	
2011							
2010					•		
2009				-			
2008							
2 Total of line 1, column (d)						2	
3 Average distribution ratio for the	5-year base period - divide the total o	on line 2 by 5,	or by the number	of years	3		
the foundation has been in exister	nce if less than 5 years					3	
4 Enter the net value of noncharitab	le-use assets for 2013 from Part X, I	ine 5				4	
5 Multiply line 4 by line 3						5	
6 Enter 1% of net investment incom	ne (1% of Part I, line 27b)					6	
7 Add lines 5 and 6						7	
9 Enter qualifying distributions for	a Part VII. lina 4						
8 Enter qualifying distributions from If line 8 is equal to or greater than	i Part XII, line 4 line 7, check the box in Part VI, line	1b, and comp	lete that part using	g a 1% t	tax rate	8	
See the Part VI instructions							

WILLIAM E. & THERESA M. RUBERT MEMORIAL 23-6956994 SCHOLARSHIP TRUST Form 990-PF (2013) Page 4 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 land enter "N/A" on line 1 (attach copy of letter if necessary-see instructions) Date of ruling or determination letter 703. b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕒 📖 and enter 1% 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, col (b) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 2 3 3 Add lines 1 and 2 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 -0-6 Credits/Payments 1,280. a 2013 estimated tax payments and 2012 overpayment credited to 2013 ба b Exempt foreign organizations - tax withheld at source 6b c Tax paid with application for extension of time to file (Form 8868) 6с d Backup withholding erroneously withheld 6d 1,280. 7 Total credits and payments Add lines 6a through 6d 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 9 577 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 577. Refunded ▶ 11 Enter the amount of line 10 to be Credited to 2014 estimated tax 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 Х any political campaign? 1a Х b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 1b If the answer is "Yes" to 1aor 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. Х c Did the foundation file Form 1120-POL for this year? 10 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 ▶ \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers > \$ X 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 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 3 X 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a N/A b If "Yes," has it filed a tax return on Form 990-T for this year? 4b X 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 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 Х 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

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Х

Х

8b

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

of each state as required by General Instruction G? If "No," attach explanation

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)

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

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

P	art 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				
	Located at ▶ P.O. BOX 1308, WEST CHESTER, PA ZIP+4 ▶1	9380		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		. / ₃ ▶	• 📖
_	and enter the amount of tax-exempt interest received or accrued during the year	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,	1	Yes	1
	securities, or other financial account in a foreign country?	16	l	X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1. If "Yes," enter the name of the foreign			
D	country ► art VII-B Statements Regarding Activities for Which Form 4720 May Be Required			<u> </u>
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	<u></u>	Voc	No
1	a During the year did the foundation (either directly or indirectly)		162	140
•	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No	ľ		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? X 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)?			
	(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)			
í	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)?	1b		Х
	Organizations relying on a current notice regarding disaster assistance check here			
(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?	10		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? X Yes No			
	If "Yes," list the years ▶2012			
ı	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	X	
(If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
_	<u> </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?			
	of "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	2.	1	
л.	Form 4720, to determine if the foundation had excess business holdings in 2013.) 1 Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	3b	\dashv	Х
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes of Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	_4a		- 12
٠	had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	1	Х
	The state of the s		DE	

WILLIAM E. & THERESA M. RUBERT MEMORIAL 23-6956994 SCHOLARSHIP TRUST Fortin 990-PF (2013) Page 6 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 Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 509(a)(1), (2), or (3), or section 4940(d)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations N/A 5b 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 N/A expenditure responsibility for the grant? Yes 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 Yes X No a personal benefit contract? Х b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b If "Yes" to 6b, file Form 8870. Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 7b b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors List all officers, directors, trustees, foundation managers and their compensation. (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average hours per week devoted to position (e) Expense account, other (c) Compensation (If not paid, enter -0-) (a) Name and address allowances SEE STATEMENT 8 12,625 0. 0. 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred (b) Title, and average (e) Expense hours per week devoted to position (a) Name and address of each employee paid more than \$50,000 (c) Compensation account, other allowances NONE

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

3 Five highest-paid independent contractors for professional services. If none, enter "I	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 statistica number of organizations and other beneficiaries served, conferences convened, research papers produce	I information such as the ed, etc	Expenses
1 N/A		
2		
3		
4		
Port IV P. Common of Durantees Deleted Investment	1	
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on line	s 1 and 2	Amount
1 N/A	0 1 4.10 2	ranount
2		
All other program related investments. Con instructions		
All other program-related investments. See instructions 3		
3		
Total. Add lines 1 through 3	>	0.
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SCHOLARSHIP TRUST

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F	Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations,	see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
а		1a	1,249,019.
b		1b	1,249,019. 207,176.
C		10	
d	Total (add lines 1a, b, and c)	1d	1,456,195.
е	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	1,456,195.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	21,843.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,434,352.
6	Minimum investment return. Enter 5% of line 5	6	71,718.
P	Tart XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here ☐ and do not complete this part)	d certain	
1	Minimum investment return from Part X, line 6	1	71,718.
2a	1 1 700		
b			
C	Add lines 2a and 2b	2c	703.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	703. 71,015.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	0. 71,015.
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	71,015.
-	art XII Qualifying Distributions (see instructions)	'l	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	39,905.
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		
а	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	39,905.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	0. 39,905.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation q 4940(e) reduction of tax in those years	ualifies fo	r the section

Form **990-PF** (2013)

SCHOLARSHIP TRUST

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				71,015.
2 Undistributed income, if any, as of the end of 2013		,, ,, ,,		
a Enter amount for 2012 only			54,153.	
b Total for prior years			·	
B rotarios prior yours		0.		
3 Excess distributions carryover, if any, to 2013	···-		· · · · · · · · · · · · · · · · · · ·	
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
	0.			
f Total of lines 3a through e	<u> </u>			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶\$ 39,905.				
·			39,905.	
a Applied to 2012, but not more than line 2a			39,903.	· · · · · · · · · · · · · · · · · · ·
b Applied to undistributed income of prior		0.		
years (Election required - see instructions)		<u> </u>		т ч-
c Treated as distributions out of corpus	_			
(Election required - see instructions)	0.	····		
d Applied to 2013 distributable amount				0.
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.		Adaptatabase		
2 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			14,248.	
f Undistributed income for 2013 Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2014				71,015.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by			1	
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.			
O Analysis of line 9		***************************************	•••••••••••••••••••••••••••••••••••••••	***************************************
a Excess from 2009		1		
b Excess from 2010		1		
c Excess from 2011		l	1	
d Excess from 2012		ļ		
e Excess from 2013				
6 LAUGSS HUHI 2013	1			5 000 DE (0010)

1 if the foundation has received a ruling or determination later that it is a private operating foundation, and the ruling is affective of 2013, nater the date of the ruling is flower of 2013, after the lates of the adjusted native of 2013, after the lates of the adjusted native rule rule of the adjusted native rule of the adjusted rule of the adjust	Part XIV Private Operating Fo	oundations (see in	structions and Part V	II-A, question 9)	N/A	
b Check box to midcals withinter the foundation as a provate operating foundation described in section [44942(j)(5) or 4942(j)(5) or 4942(j)(5	1 a If the foundation has received a ruling or	determination letter tha	t it is a private operating			
2. Each ter besides of the adjusted net income from Part I of the minimum investment return from Part I of the minimum investment return from Part IV or each year Isled by 85% of line 2a country and state of the American Part IV or each year Isled d Amounts included in line 2 or not used directly for active conduct of exempt activities with the Country of the Coun	foundation, and the ruling is effective for	2013, enter the date of	the ruling	>		
income from Part I or the minimum investment return from Part X for acity varieties and year listed bit 50% of time 2a countrying distributions from Part XII, line 4 for such year listed di Amonetis mediude in line 2 not used directly for active conduct of exempt activities and directly for active conduct of exempt activities. Subtract line 2d from line 2c Compilets 3b. for 6 or for the alternative test relied upon under section 4942(0)(3)(8)(1) by a for active conduct of exempt activities. Subtract line 2d from line 2c Compilets 3b. for 6 or for the alternative test relied upon under section 4942(0)(3)(8)(1) by a for active conduct of exempt activities. In the form in the property of the form in the form of the form of the form in the form of the f	b Check box to indicate whether the founda	ation is a private operati	ng foundation described		4942(j)(3) or 49	42(j)(5)
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b 85% of time 2a Coulsifying distributions from Part XII, line 4 for each year listed of Amounts included in time 2c not used directly for active conduct of exempt activities and control of exempt activities are constituted in the 2c not used directly for active conduct of exempt activities are constituted in a 2c of constitution and a 2c of constitut	investment return from Part X for					
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SCHOLARSHIP TRUST Form 990-PF (2013)

Page 11 Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation Purpose of grant or show any relationship to Amount status of contribution any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year NONE PUBLIC NURSING SCHOLARSHIPS DREXEL UNIVERITY, MCP HAHNEMAN HOSPITAL 1554 RACE STREET 29,500. PHILADELPHIA, PA 191021192 **▶** 3a 29,500. Total b Approved for future payment NONE

0.

▶ 3b

Total

Form 990-PF (2013) SCHOLARSHIP			23-	6956994 Page 12
Part XVI-A Analysis of Income-P	_			
Enter gross amounts unless otherwise indicated	Unrelated bus (a) Business	(b) Exclu- Amount Sion	(d) Amount	(e) Related or exempt function income
1 Program service revenue	code	Amount code	Amount	
a b				
b	1 1			
d				
e				
f				
g Fees and contracts from government agencies				<u> </u>
2 Membership dues and assessments				
3 Interest on savings and temporary cash				
investments		14		
4 Dividends and interest from securities		14	37,420.	
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		1.0		-0 075
than inventory		18	3	<2,375.
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)		0.	38,292.	<2.375.
13 Total. Add line 12, columns (b), (d), and (e)	<u> </u>		13	
(See worksheet in line 13 instructions to verify calculati	ions)			
Part XVI-B Relationship of Activi		lishment of Exemp	ot Purposes	
Line No. Explain below how each activity for whi			buted importantly to the accom	plishment of
the foundation's exempt purposes (oth	er than by providing funds fo	r such purposes)		
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				_
				
				
	<u> </u>			
				
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Form **990-PF** (2013)

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

		Exempt Organ	izations							
1	Did the	organization directly or indi	rectly engage in any	of the following	ng with any other organizal	tion described in se	ction 501(c) of	1	Yes	No
	the Code	e (other than section 501(c)(3) organizations) d	r in section 52	27, relating to political orga	anizations?				
а	Transfer	rs from the reporting found:	ation to a noncharita	ible exempt or	ganization of					
	(1) Cas	:h						1a(1)		Х
	(2) Oth	er assets						1a(2)		X
b	Other tra	ansactions								
	(1) Sale	es of assets to a noncharita	ble exempt organiza	tion				16(1)		Х
	(2) Pur	chases of assets from a no	ncharitable exempt o	organization				10(2)		X
	(3) Ren	ital of facilities, equipment,	or other assets					1b(3)		Х
	(4) Ren	mbursement arrangements						1b(4)		Х
	(5) Loa	ins or loan guarantees						1b(5)		X
	(6) Per	formance of services or me	embership or fundrai	sing solicitation	ons			1b(6)		Х
C	Sharing	of facilities, equipment, ma	uling lists, other asse	ets, or paid em	ployees			10		X
d	If the an	swer to any of the above is	"Yes," complete the	following sche	edule Column (b) should a	lways show the fair	market value of the goods,	other ass	ets,	
	or service	ces given by the reporting f	oundation. If the fou	ndation receiv	ed less than fair market va	lue in any transactio	on or sharing arrangement, s	how in		
	column	(d) the value of the goods,	other assets, or serv	ices received						
(a) ∟	ine no	(b) Amount involved	(c) Name of	f noncharitable	e exempt organization	(d) Descripti	on of transfers, transactions, and	shanng ar	rangeme	nts
				N/A						
										_
	1.									
							,			
					<u></u>					
										
							<u>.</u>			
							<u></u>			
2a	Is the fo	undation directly or indirect	tly affiliated with, or i	related to, one	or more tax-exempt organ	nizations described				_
	ın sectio	on 501(c) of the Code (other	r than section 501(c))(3)) or in sect	tion 527?		L.	Yes	X	No
<u>b</u>	If "Yes,"	complete the following sch			,	- r				
		(a) Name of org	janization		(b) Type of organization		(c) Description of relations	hip		
	-	N/A_								
										
						 				
٥.	000	er penalties of penury, I declare belief, it is true, correct, and con					May	y the IRS o	liscuss t	his
Sig		Doon of M	se toluer		15/15/5010	TTEE	sho	wn below	(see inst	r)?
He	Z				DITSPION	_ /	· L	X Yes	L	J No
	34	gnakure of officer or trustee		0	Date	Title	Chook SZ of DTIN			
		Print/Type preparer's na	ine	Preparer's s	ignature /	Date	Check X if PTIN self- employed			
Pa	:~!	CHEDITON	DOMMC	19	1/1/8/1	05/00/14	· • •	2402	<i>c</i> 0 1	
	ıa eparer	STEPHEN D. Firm's name ► HER		& POTT	c v v v v	05/09/14	Firm's EIN ► 23-19	0402		
	e Only		A, PUITS	& POTT	S		FIRM S EIN P 23-13	, v v 3	00	
US	e O(11)	Firm's address ► 20	O EXCIE D	ם כחד	106					
							Dhana 1610 \	251		1 /
		WA	YNE, PA 1	3001-3	112		Phone no (610)			
							FC	orm 990	,-PF (2013)

FORM 990-PF INTERES	ST ON SAVII	NGS AND TEM	PORARY	CASH IN	IVESTMENTS	STATEMENT 1
SOURCE		(A REVE PER B	NUE		(B) IVESTMENT ICOME	(C) ADJUSTED NET INCOME
CITIGROUP SMITH BARN #474168894303 - INTI		-	872.		872.	
TOTAL TO PART I, LI	NE 3		872.		872.	
FORM 990-PF	DIVIDENDS	S AND INTER	EST FR	OM SECUR	ITIES	STATEMENT 2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	R.	(A) EVENUE R BOOKS	(B) NET INVES MENT INCO	
CITI SMITH BARNEY #474168894303 CITI SMITH	35,922	•	0.	35,922.	35,92	2.
BARNEY-NONDIVIDEND DISTRIBUTION	1,498	•	0.	1,498.	1,49	8.
TO PART I, LINE 4	37,420	•	0.	37,420.	37,42	0.
FORM 990-PF		LEGAL	FEES			STATEMENT 3
DESCRIPTION		(A) EXPENSES PER BOOKS	NET II	3) NVEST- INCOME	(C) ADJUSTED NET INCOM	
HERR, POTTS & POTTS		575.		375.		200.
TO FM 990-PF, PG 1,	LN 16A	575.		375.		200.

FORM 990-PF	TAX	ES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVES MENT INCO		(C) ADJUSTED NET INCOM		
FOREIGN TAX WITHHELD	126.	1	26.			0.
TO FORM 990-PF, PG 1, LN 18	126.	1	26.			0.
FORM 990-PF	OTHER E	XPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVES MENT INCC		(C) ADJUSTED NET INCOM		
TELEPHONE, ETC	210.	1	.05.		1	05.
PHOTOS OF SCHOLARSHIP WINNERS	46.		0.			0.
ADVERTISING ON WEB	147.		0.			0.
TRAVEL, MILEAGE & PARKING	501.		0.			0.
TO FORM 990-PF, PG 1, LN 23	904.	1	05.		1	05.
FORM 990-PF	CORPORAT	E STOCK			STATEMENT	6
DESCRIPTION			вос	K VALUE	FAIR MARKE VALUE	T
1000 SHS EXXON CORP.		<u></u>		15,825.	101,2	00
500 SHS IBM CORP.				12,364.	93,7	
214 SHS MOTOROLA SOLUTIONS IN	1C			14,033.	14,4	
1200 SHS AT&T INC.				62,111.	42,1	
1,418 SHS DOMINION RESOURCES,				28,803.	91,7	
3,200 SHS GENERAL ELECTRIC CO	·			10,851.	89,6	
1,989 PFIZER INC. 1000 VERIZON COMMUNICATIONS				69,129. 21,872.	60,9	
1300 SHS WILLIAMS COS INC. 98	k			27,615.	49,1 50,1	
1,000 SHS J P MORGAN CHASE &				37,777.	58,4	
400 SHS JOHNSON & JOHNSON				24,652.	36,6	
550 SHS PEPSICO INC				31,705.	45,6	
500 SHS BANK OF AMERICA CORP	ing c co			25,158.	7,7	
1,400 SHS E.I.DUPONT DE NEMOU				63,784.	90,9	
1,700 SHS FIFTH THIRD BANKCOF 78 SHS PNC FINANCIAL SERVICES				39,046. 25,055.	35,7 6,0	
240 SHS FRONTIER COMMUNICATION				1,232.	1,1	

WIŁLIAM E. & THERESA M. RUBERT MEN		23-6956994	
Y,000, SHS MICROCHIP TECHNOLOGY INC		26,511.	44,750.
1,000 SHS TRANSOCEAN LTD SWITZERLAND	NEW	48,359.	49,420.
1,800 SHS DOW CHEMICAL CO		46,503.	79,920.
1,000 SHS NUCOR CORP		39,566.	53,380.
600 SHS PROCTER & GAMBLE CO	39,955.		
565 SHS ROYAL DUTCH SHELL PLC ADR CI	38,911.		
1,000 SHS INTERSIL HOLDINGS CP	9,317.	11,471.	
433 SHS WPX ENERGY INC.	6,255.	8,825.	
TOTAL TO FORM 990-PF, PART II, LINE	10B	766,389.	1,214,695.
<u> </u>	10B R INVESTMENTS	766,389.	1,214,695. STATEMENT 7
		BOOK VALUE	
FORM 990-PF OTHER DESCRIPTION	VALUATION METHOD		STATEMENT 7 FAIR MARKET
FORM 990-PF OTHER	R INVESTMENTS VALUATION	BOOK VALUE	STATEMENT 7 FAIR MARKET VALUE
FORM 990-PF OTHER DESCRIPTION 1,373.664 EUROPACIFIC GROWTH FUND	VALUATION METHOD		STATEMENT 7 FAIR MARKET
FORM 990-PF OTHER DESCRIPTION 1,373.664 EUROPACIFIC GROWTH FUND CL A	VALUATION METHOD	BOOK VALUE 67,808.	STATEMENT 7 FAIR MARKET VALUE 67,406.

	LIST OF OFFICERS, DIRECTORS AND FOUNDATION MANAGERS		STATEMENT 8	
NAME AND ADDRESS	TITLE AND AVRG HRS/WK	_	EMPLOYEE BEN PLAN CONTRIB	EXPENSE
DR. JEAN S. MACFADYEN 1426 REDWOOD COURT WEST CHESTER, PA 19380	TRUSTEE/CHAIRE 2.50	PERSON 12,625.	0.	0.
DR. JAY MACMORAN 435 RIGHTERS MILL ROAD NARBERTH VALLEY, PA 19072	TRUSTEE 0.00	0.	0.	0.
DR. WILBUR W. OAKS 255 S. 17TH ST, STE 300 PHILA, PA 19103	TRUSTEE 0.00	0.	0.	0.
DR. H. NEWTON SPENCER 250 GOLFVIEW ROAD ARDMORE, PA 19003	TRUSTEE 0.00	0.	0.	0.
DR. KATHLEEN BREWER-SMYTH 6 BALMORAL DRIVE CHADDS FORD, PA 19317	TRUSTEE 0.10	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE	6, PART VIII	12,625.	0.	0.