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Form **990-PF**

Return of Private Foundation

OMB No 1545-0052

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

2013

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

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

Name of foundation KALMAN FOUNDATION		A Employer identification number 26-1475115	
% FRANCIS S KALMAN		B Telephone number (see instructions) (713) 594-1647	
Number and street (or P O box number if mail is not delivered to street address) Room/suite 403 MENKING COURT Suite		C If exemption application is pending, check here <input type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code HOUSTON, TX 77024		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
G Check all that apply: <input type="checkbox"/> Initial return, <input type="checkbox"/> Initial return of a former public charity, <input type="checkbox"/> Final return, <input type="checkbox"/> Amended return, <input type="checkbox"/> Address change, <input type="checkbox"/> Name change		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation, <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust, <input type="checkbox"/> Other taxable private foundation		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,203,197		J Accounting method: <input checked="" type="checkbox"/> Cash, <input type="checkbox"/> Accrual, <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	

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)	0			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	19,068	19,068		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-38,376			
	b Gross sales price for all assets on line 6a 1,148,658				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain			40,287	
	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)	<input checked="" type="checkbox"/> -58,469	-909			
12 Total. Add lines 1 through 11	-77,777	18,159	40,287		
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)	<input checked="" type="checkbox"/> 2,267	2,267	0	0
	c Other professional fees (attach schedule)				
	17 Interest	321	321		
	18 Taxes (attach schedule) (see instructions)	<input checked="" type="checkbox"/> 577	103		
	19 Depreciation (attach schedule) and depletion	<input checked="" type="checkbox"/> 3,330			
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
23 Other expenses (attach schedule)	<input checked="" type="checkbox"/> 5,133	559			
24 Total operating and administrative expenses. Add lines 13 through 23	11,628	3,250	0	0	
25 Contributions, gifts, grants paid	77,000			77,000	
26 Total expenses and disbursements. Add lines 24 and 25	88,628	3,250	0	77,000	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-166,405				
b Net investment income (if negative, enter -0-)		14,909			
c Adjusted net income (if negative, enter -0-)			40,287		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash—non-interest-bearing					
	2 Savings and temporary cash investments	27,917	27,925	27,925		
	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)	1,081,028	914,825	1,175,272		
	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)					
	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)	1,108,945	942,750	1,203,197			
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 <input type="checkbox"/>					
	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 <input checked="" type="checkbox"/>					
	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	1,108,945	942,750				
30 Total net assets or fund balances (see page 17 of the instructions)	1,108,945	942,750				
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,108,945	942,750				

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	1,108,945
2	Enter amount from Part I, line 27a	2	-166,405
3	Other increases not included in line 2 (itemize) ▶ _____	3	210
4	Add lines 1, 2, and 3	4	942,750
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	942,750

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 Additional Data Table			
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a	See Additional Data Table			
b				
c				
d				
e				
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a	See Additional Data Table			
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	-42,048
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	40,287

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	74,526	1,033,414	0.072116
2011	100,563	1,150,731	0.087391
2010	77,690	1,129,138	0.068805
2009	76,579	1,017,296	0.075277
2008	92,593	1,560,710	0.059327
2	Total of line 1, column (d).		2 0.362916
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 0.072583
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.		4 1,151,696
5	Multiply line 4 by line 3.		5 83,594
6	Enter 1% of net investment income (1% of Part I, line 27b).		6 149
7	Add lines 5 and 6.		7 83,743
8	Enter qualifying distributions from Part XII, line 4.		8 77,000

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)

Table with 11 rows for excise tax calculations. Includes categories like 'Exempt operating foundations', 'Domestic foundations', 'Tax under section 511', and 'Tax due'. Total tax due is 298.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political campaigns, political expenditures, and state reporting. Includes sub-questions 1a-1c, 2, 3, 4a-4b, 5, 6, 7, 8a-8b, 9, and 10.

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? Website address ▶ _____	13	Yes			
14	The books are in care of ▶ <u>FRANCIS S KALMAN</u> Telephone no ▶ <u>(713) 594-1647</u> Located at ▶ <u>403 MENKING COURT HOUSTON TX</u> ZIP +4 ▶ <u>77024</u>					
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ <table border="1" style="display: inline-table;"><tr><td>15</td><td></td></tr></table>	15				
15						
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? See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶ _____	16	Yes	No		

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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 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		No
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>)	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)

<p>5a During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(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). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>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</p> <p>Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/></p> <p>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? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b No</p> <p>If "Yes" to 6b, file Form 8870.</p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? 7b</p>	
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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
FRANCIS S KALMAN 403 MENKING COURT HOUSTON, TX 77024	DIRECTOR 0	0		
GLORIA R KALMAN 403 MENKING COURT HOUSTON, TX 77024	DIRECTOR 0	0		
LAUREN KALMAN SUMMERVILLE 403 MENKING COURT HOUSTON, TX 77024	DIRECTOR 0	0		
JENNIFER KALMAN FUENTES 403 MENKING COURT HOUSTON, TX 77024	DIRECTOR 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

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
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		
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	1,117,452
b	Average of monthly cash balances.	1b	51,783
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,169,235
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	0
3	Subtract line 2 from line 1d.	3	1,169,235
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	17,539
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,151,696
6	Minimum investment return. Enter 5% of line 5.	6	57,585

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	57,585
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	298
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	298
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	57,287
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	57,287
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	57,287

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	77,000
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	77,000
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	77,000

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				57,287
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 2011, 2010, 2009		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				44,921
b From 2009.				25,900
c From 2010.				21,853
d From 2011.				43,900
e From 2012.				23,803
f Total of lines 3a through e.	160,377			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ <u>77,000</u>				
a Applied to 2012, but not more than line 2a			0	
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.				57,287
e Remaining amount distributed out of corpus	19,713			
5 Excess distributions carryover applied to 2013 <i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	180,090			
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.				
d Subtract line 6c from line 6b Taxable amount—see instructions.		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions.			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions).	44,921			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a.	135,169			
10 Analysis of line 9				
a Excess from 2009.				25,900
b Excess from 2010.				21,853
c Excess from 2011.				43,900
d Excess from 2012.				23,803
e Excess from 2013.				19,713

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))

See Additional Data Table

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 or e-mail address of the person to whom applications should be addressed
 FRANCIS S KALMAN
 403 MENKING COURT
 HOUSTON, TX 77024
 (713) 594-6471

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

c Any submission deadlines
 NONE

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
 NONE

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 <i>Paid during the year</i> See Additional Data Table				
Total				77,000
b <i>Approved for future payment</i>				
Total				3b

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
SEE ATTACHED STATEMENT- ST	P	2013-01-01	2013-12-31
SEE ATTACHED STATEMENT - ST	P	2013-01-01	2013-12-31
SEE ATTACHED STATEMENT - LT	P	2012-01-01	2013-12-31
SEE ATTACHED STATEMENT-ST	P	2013-01-01	2013-12-31
SEE ATTACHED STATEMENT - LT	P	2012-01-01	2013-12-31
CAPITAL GAIN DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
138,144		135,317	2,827
435,144		398,898	36,246
198,709		164,962	33,747
32,471		31,257	1,214
313,327		429,483	-116,156
			24

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			2,827
			36,246
			33,747
			1,214
			-116,156

Form 990PF Part XV Line 1a - 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).

FRANCIS S KALMAN
GLORIA R KALMAN

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
BOYS AND GIRLS COUNTRY 18806 ROBERTS ROAD HOCKLEY, TX 774479327		PC	CHILDRENS HOME	15,000
CATHOLIC CHARITIES 2900 LOUISIANA ST HOUSTON, TX 77006		PC	SUPPORT ORGANIZATION FOR FAMILIES AND INDIVIDUALS IN NEED	15,000
BETHLEHEM HOLY CHILD PROGRAM PO BOX 7083 MERIDEN, CT 06450		PC	SUPPORTS EDUCATION & THERAPY FOR CHILDREN AND FAMILIES IN BETHLEHEM	5,000
HOUSTON AREA WOMENS CENTER 1010 WAUGH DR HOUSTON, TX 77019		PC	SUPPORT ORGANIZATION FOR WOMEN IN NEED	5,000
LIFEHOUSE PO BOX 27127 HOUSTON, TX 77227		PC	SUPPORT ORGANIZATION FOR YOUNG MOTHERS	5,000
PATRIOT PAWS SERVICE DOGS 254 RANCH TRAIL ROCKWALL, TX 75032		PC	SUPPORT PROGRAM THAT PROVIDES SERVICE DOGS TO THOSE WITH DISABILITIES	27,000
THEATRE UNDER THE STARS 800 BAGBY STE 200 HOUSTON, TX 77002		PC	PROVIDE OPPORTUNITIES FOR ADULTS & CHILDREN WITH DISABILITIES TO EXPERIENCE MUSICAL THEATRE	5,000
Total			3a	77,000

TY 2013 Accounting Fees Schedule

Name: KALMAN FOUNDATION

EIN: 26-1475115

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	2,267	2,267		

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

TY 2013 Depreciation Schedule

Name: KALMAN FOUNDATION

EIN: 26-1475115

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
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**TY 2013 Investments Corporate
Stock Schedule****Name:** KALMAN FOUNDATION**EIN:** 26-1475115

Name of Stock	End of Year Book Value	End of Year Fair Market Value
INVESTMENT PORTFOLIO	914,825	1,175,272

TY 2013 Investments - Land Schedule

Name: KALMAN FOUNDATION

EIN: 26-1475115

TY 2013 Land, Etc. Schedule

Name: KALMAN FOUNDATION

EIN: 26-1475115

TY 2013 Other Expenses Schedule

Name: KALMAN FOUNDATION

EIN: 26-1475115

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK CHARGES	194	194		
PTP SECTION 59(E)(2) EXPENSES	4,574			
PTP MISCELLANEOUS EXPENSES	365	365		

TY 2013 Other Income Schedule

Name: KALMAN FOUNDATION

EIN: 26-1475115

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PTP RENT AND ROYALTY INCOME	121	121	
PTP INCOME	-57,560		
PTP OTHER RENTAL INCOME	9	9	
PTP OTHER INCOME	-31	-31	
PTP SECTION 1231 GAIN/LOSS	-1,008	-1,008	

TY 2013 Other Increases Schedule

Name: KALMAN FOUNDATION

ETIN: 26-1475115

Description	Amount
BOOK/TAX DIFERENCE	210

TY 2013 Taxes Schedule

Name: KALMAN FOUNDATION

EIN: 26-1475115

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	103	103		
2012 FORM 990PF TAXES	474			

TY 2013 IRS Payment**Name:** KALMAN FOUNDATION**EIN:** 26-1475115**Routing Transit Number:** 111900659**Bank Account Number:** 2000037621120**Type of Account:** Checking**Payment Amount in Dollars and** 305**Cents:****Requested Payment Date:** 2014-07-11**Taxpayer's Daytime Phone** (713) 622-0016**Number:**



2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No Z66-084301 Customer Service 800-544-4442
 Recipient ID No. 26-1475115 Payer's Fed ID Number 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient: OMB NO. 1545-0715

Short-term transactions for which basis is reported to the IRS -- report on Form 8949 with Box A checked and/or Schedule D, Part I
 (This label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
MCDERMOTT INTERNATIONAL INC COM STK USD1, MDR, 580037109									
Sale	05/08/13	04/22/13	200.000	2,204.35	1,998.00	206.35			
Sale	05/08/13	04/22/13	4,800.000	52,907.29	47,952.00	4,955.29			
Subtotals				55,111.64	49,950.00				
POWERSHARES EXCHANGETRADED FD TR FINL PF, PGF, 73935X229									
Sale	10/28/13	03/08/13	800.000	13,803.03	14,837.12	-1,034.09			
POWERSHARES EXCHANGETRADED FD TR II CEF, PCEF, 739360843									
Sale	04/18/13	03/08/13	500.000	12,930.91	13,085.12	-154.21			
SPDR INDEX SHS FDS DJ WILSHIRE INTL REAL, RWX, 78463X663									
Sale	04/18/13	03/08/13	350.000	15,620.15	14,822.50	797.65			
SPDR SER TR BARCLAYSHIGH YIELD BD ETF, JNK, 78464A417									
Sale	04/18/13	03/08/13	100.000	4,110.01	4,089.50	20.51			
Sale	04/18/13	03/08/13	100.000	4,110.00	4,089.10	20.90			
Sale	04/18/13	03/08/13	225.000	9,248.42	9,200.48	47.94			
Subtotals				17,468.43	17,379.08				
TRANSOCEAN LIMITED COM CHF15, RIG, H8817H100									
Sale	10/28/13	03/08/13	475.000	23,210.13	25,242.83	-2,032.70			
TOTALS				138,144.29	135,316.65				0.00
				Box A Short-Term Realized Gain		6,048.64			
				Box A Short-Term Realized Loss		-3,221.00			
				Box A Wash Sale Loss Disallowed		0.00			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. Z66-084301 Customer Service 800-544-4442
 Recipient ID No. 26-1475115 Payer's Fed ID Number. 04-3523567

FORM 1099-B

2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient: OMB NO. 1545-0715

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
AFFILIATED MANAGERS GROUP, AMG, 008252108									
Sale	01/28/13	12/04/12	14,000	2,020.60	1,781.53	239.07			
ALLIANCE BERNSTEIN DISCOVERY GRWTH ADV, CHCYX, 018636407									
Sale	04/18/13	06/18/12	2,314.286	18,190.29	16,200.00	1,990.29			
ALLIANCEBER DISCOVERVALUE FUND ADVISOR, ABYSX, 018914408									
Sale	04/18/13	various	1,021.447	19,070.42	16,443.27	2,627.15			
ALTRIA GROUP INC, MO, 02209S103									
Sale	03/07/13	05/21/12	75,000	2,541.28	2,384.25	157.03			
Sale	03/07/13	07/26/12	75,000	2,541.28	2,677.33	-136.05			
Sale	03/07/13	08/17/12	75,000	2,541.28	2,650.21	-108.93			
Subtotals				7,623.84	7,711.79				
AMAZON COM INC, AMZN, 023135106									
Sale	03/07/13	11/14/12	25,000	6,829.84	5,609.84	1,220.00			
AMGEN INC, AMGN, 031162100									
Sale	01/28/13	05/17/12	30,000	2,561.49	2,141.40	420.09			
ANSYS INC, ANSS, 09662Q105									
Sale	01/28/13	07/06/12	75,000	5,524.67	4,548.80	975.87			
APPLIED MATERIALS INC, AMAT, 038222105									
Sale	03/07/13	07/17/12	100,000	1,366.97	1,033.75	333.22			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. Z66-084301 Customer Service: 800-544-4442
 Recipient ID No. 26-1475115 Payer's Fed ID Number: 04-3523667

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions Copy 5 (for Recipient) OMB No. 1545-0715

Short-term transactions for which basis is not reported to the IRS -- report on Form 8949 with Box B checked and/or Schedule D, Part I
 (This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
AT&T INC COM, T, 00206R102									
Sale	01/28/13	07/19/12	45.000	1,536.10	1,596.54	-60.44			
BANK OF AMERICA CORP, BAC, 060505104									
Sale	01/28/13	12/12/12	475.000	5,461.21	5,042.22	418.99			
BB & T CORP, BBT, 054937107									
Sale	01/28/13	09/19/12	15.000	464.06	504.62	-40.54			
Sale	01/28/13	09/19/12	100.000	3,086.48	3,364.14	-277.66			
Subtotals				3,550.56	3,868.76				
BECTON DICKINSON CO, BDX, 075867109									
Sale	03/07/13	07/30/12	40.000	3,527.93	3,041.58	486.35			
Sale	03/07/13	09/14/12	15.000	1,322.97	1,184.06	138.91			
Sale	03/07/13	10/11/12	20.000	1,763.96	1,543.49	220.47			
Subtotals				6,614.86	5,769.13				
BERKSHIRE HATHAWAY INC DEL CL B NEW, BRKB, 084670702									
Sale	04/18/13	07/17/12	40.000	4,179.51	3,380.46	799.05			
Sale	04/18/13	08/21/12	15.000	1,567.32	1,285.77	281.55			
Subtotals				5,746.83	4,666.23				
BIOGEN IDEC INC, BIIB, 09062X103									
Sale	01/28/13	08/17/12	60.000	9,021.24	8,697.12	324.12			
BP PLC ADR (CNV INTO6 ORD USD0.25 SHS), BP, 055622104									
Sale	03/07/13	04/17/12	25.000	1,017.09	1,079.15	-62.06			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. Z66-084301 Customer Service: 800-544-4442
 Recipient ID No. 26-1475115 Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
CHIPOTLE MEXICAN GRILL INC, CMG, 169656105									
Sale	01/28/13	06/15/12	6.000	1,870.82	2,405.78	-534.96			
Sale	01/28/13	07/20/12	9.000	2,806.22	2,864.20	-57.98			
Subtotals				4,677.04	5,269.98				
CISCO SYS INC, CSCO, 17275R102									
Sale	03/07/13	03/08/12	56.000	1,224.97	1,103.56	121.41			
CIT GROUP INC NEW COM NEW, CIT, 125581801									
Sale	01/28/13	01/30/12	40.000	1,623.71	1,519.81	103.90			
Sale	01/28/13	02/01/12	50.000	2,029.63	1,950.82	78.81			
Subtotals				3,653.34	3,470.63				
CITRIX SYSTEMS INC, CTXS, 177376100									
Sale	03/07/13	08/21/12	25.000	1,856.21	1,936.29	-80.08			
Sale	03/07/13	11/01/12	20.000	1,484.97	1,268.25	216.72			
Subtotals				3,341.18	3,204.54				
COACH INC, COH, 189754104									
Sale	01/28/13	04/27/12	30.000	1,539.15	2,221.73	-682.58			
Sale	01/28/13	05/23/12	40.000	2,052.21	2,710.70	-658.49			
Subtotals				3,591.36	4,932.43				
COGNIZANT TECH SOLUTIONS CORP, CTSH, 192446102									
Sale	01/28/13	04/10/12	50.000	3,893.74	3,766.04	127.70			
Sale	01/28/13	04/17/12	15.000	1,168.12	1,112.62	55.50			
Sale	01/28/13	04/23/12	20.000	1,557.49	1,433.52	123.97			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. **Z66-084301** Customer Service: 800-544-4442
 Recipient ID No. **26-1475116** Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy 8 for Recipient: OMB NO. 1545-0715

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I
 (This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
COGNIZANT TECH SOLUTIONS CORP, CTSH, 192446102									
Sale	01/28/13	04/27/12	20,000	1,557.49	1,479.33	78.16			
Sale	01/28/13	08/21/12	20,000	1,557.50	1,300.40	257.10			
Subtotals				9,734.34	9,091.91				
CONAGRA FOODS INC, CAG, 205887102									
Sale	03/07/13	01/14/13	250,000	8,713.10	7,745.20	967.90			
DANAHER CORP, DHR, 235851102									
Sale	01/28/13	04/24/12	25,000	1,509.88	1,328.23	181.65			
DIAMOND OFFSHORE DRILLING INC, DO, 25271C102									
Sale	03/07/13	11/09/12	11,000	744.24	724.91	19.33			
Sale	03/07/13	11/09/12	54,000	3,654.64	3,558.62	96.02			
Sale	03/07/13	11/14/12	50,000	3,383.92	3,269.32	114.60			
Subtotals				7,782.80	7,552.85				
DIRECTV COM USD0.01, DTV, 25490A309									
Sale	01/28/13	11/12/12	55,000	2,944.39	2,665.12	279.27			
DISCOVER FINL SVCS, DFS, 254709108									
Sale	01/28/13	12/03/12	140,000	5,347.38	5,804.55	-457.17			
DISNEY WALT CO, DIS, 254687106									
Sale	01/28/13	02/15/12	25,000	1,359.63	1,036.81	322.82			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. Z66-084301 Customer Service 800-544-4442
 Recipient ID No. 26-1475115 Payer's Fed ID Number 04-3523567

FORM 1099-B 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient GMB NO. 1545-0715

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I

(This Label is a Substitute for Boxes 1c & 6)

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8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
EATON CORP PLC COM, ETN, G29183103								
Sale	01/28/13	08/02/12	25,000	1,433.46	1,068.96		364.50	
Sale	01/28/13	08/02/12	25,000	1,431.61	1,068.96		362.65	
Sale	01/28/13	06/15/12	75,000	4,294.81	3,421.50		873.31	
Subtotals				7,159.88	5,559.42			
EBAY INC, EBAY, 278642103								
Sale	01/28/13	08/24/12	70,000	3,912.87	3,304.97		607.90	
EVEREST RE GROUP COMSTK USD0.01, RE, G3223R108								
Sale	01/28/13	12/28/12	25,000	2,851.73	2,734.13		117.60	
FIDELITY NATIONAL INFORMATION SERVICES I, FIS, 31620M106								
Sale	03/07/13	09/26/12	110,000	4,144.31	3,516.30		628.01	
Sale	03/07/13	11/12/12	35,000	1,318.65	1,222.77		95.88	
Subtotals				5,462.96	4,739.07			
FIDELITY NATL FINL INC, FNF, 31620R105								
Sale	01/28/13	09/24/12	190,000	4,708.69	4,010.13		698.56	
FISERV INC, FISV, 337736108								
Sale	01/28/13	01/11/13	60,000	4,836.34	4,966.88		-132.54	
F5 NETWORKS INC, FFIV, 315616102								
Sale	01/28/13	04/16/12	17,000	1,798.94	2,067.90		-288.96	
Sale	01/28/13	05/29/12	18,000	1,904.77	1,960.92		-56.15	
Subtotals				3,703.71	4,048.82			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION
 Account No. Z65-984301 Customer Service: 800-544-4442
 Recipient ID No. 26-1476115 Payer's Fed ID Number: 04-3523667

FORM 1099-B 2013 Proceeds from Broker and Barter Exchange Transactions Copy B for Recipient OMB NO. 1545-0715

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(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
GOLDMAN SACHS GROUP INC, GS, 38141G104									
Sale	03/07/13	01/11/13	45,000	7,031.54	6,150.13	881.41			
GOOGLE INC CL A, GOOG, 38259P508									
Sale	03/07/13	08/17/12	3,000	2,498.37	2,022.02	476.35			
HARRIS CORP DEL, HRS, 413875105									
Sale	01/28/13	10/04/12	65,000	3,197.39	3,323.61	-126.22			
Sale	01/28/13	01/09/13	25,000	1,229.77	1,236.11	-6.34			
Subtotals				4,427.16	4,569.72				
HEWLETT-PACKARD CO DE, HPQ, 428236103									
Sale	03/07/13	03/08/12	125,000	2,622.81	3,072.68	-449.87			
HOME DEPOT INC, HD, 457076102									
Sale	03/07/13	05/30/12	25,000	1,755.54	1,240.08	515.46			
Sale	03/07/13	07/27/12	25,000	1,755.54	1,335.50	420.04			
Sale	03/07/13	08/17/12	60,000	4,213.29	3,414.91	798.38			
Subtotals				7,724.37	6,990.49				
IDEXX LABS CORP, IDXX, 45168D104									
Sale	01/28/13	07/25/12	35,000	3,514.19	3,049.28	464.91			
Sale	01/28/13	08/02/12	30,000	3,012.16	2,622.68	389.48			
Subtotals				6,526.35	5,671.96				
ENERGY MIDSTREAM LP UNIT LTD PARTNERSHIP, 45671U106									
Cash In Lieu	06/24/13	06/24/13	0.000	2.83	0.00	2.83			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. Z68-084301 Customer Service: 800-544-4442
 Recipient ID No. 26-1475115 Payer's Fed ID Number: 04-3523567

FORM 1099-B 2013 Proceeds from Broker and Barter Exchange Transactions Copy B for Recipient. OMB NO. 1545-0715

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I
 (This label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Disallowed	4 Federal Income Tax Withheld	13 State	15 State Tax Withheld
INTERCONTINENTALEXCHINC, 45866V100										
Sale	03/07/13	08/30/12	45,000	7,179.58	6,109.06	1,070.52				
Sale	03/07/13	11/13/12	10,000	1,595.46	1,303.22	292.24				
Sale	03/07/13	12/20/12	10,000	1,595.47	1,279.44	316.03				
Subtotals				10,370.51	8,691.72					
INTL BUSINESS MACH, IBM, 459200101										
Sale	03/07/13	05/31/12	15,000	3,136.28	2,903.96	232.32				
Sale	03/07/13	08/16/12	10,000	2,090.85	1,997.23	93.62				
Sale	03/07/13	09/21/12	15,000	3,136.28	3,112.56	23.72				
Subtotals				8,363.41	8,013.75					
INTUIT INC, INTU, 461202103										
Sale	03/07/13	01/09/13	20,000	1,358.17	1,242.11	116.06				
INTUITIVE SURGICAL INC COM NEW, ISRG, 46120E602										
Sale	01/28/13	11/14/12	13,000	7,527.72	6,893.81	633.91				
JPMORGAN CHASE & CO, JPM, 46625H100										
Sale	01/28/13	03/27/12	60,000	2,802.19	2,772.81	29.38				
Sale	01/28/13	10/25/12	45,000	2,101.64	1,883.08	218.56				
Subtotals				4,903.83	4,655.89					
KINDER MORGAN ENERGY PARTNERS L P, KMP, 494550106										
Cash In Lieu	05/06/13	05/06/13	0.040	3.50	2.93	0.57				

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. Z66-084301 Customer Service. 800-544-4442
 Recipient ID No. 26-1475115 Payer's Fed ID Number 04-3523667

FORM 1099-B 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I
 (This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
KRAFT FOODS GROUP INC COM NPV, KRFT, 50076Q106									
Sale	03/07/13	08/02/12	21.000	1,028.56	877.68	150.88			
Sale	03/07/13	08/21/12	10.000	489.79	425.96	63.83			
Sale	03/07/13	10/05/12	54.000	2,644.86	2,567.49	77.37			
Sale	03/07/13	01/09/13	45.000	2,204.04	2,078.28	125.76			
Subtotals				6,367.26	5,949.41				
KROGER CO, KR, 501044101									
Sale	03/07/13	03/12/12	50.000	1,521.64	1,217.63	304.01			
LIBERTY MEDIA CORPORATION COM USD0.01, LMCA, 531229102									
Sale	01/28/13	10/25/12	25.000	2,762.23	2,457.18	305.05			
LINKEDIN CORP COM USD0.0001, LNKD, 53578A108									
Sale	01/28/13	11/08/12	30.000	3,803.16	2,988.01	815.15			
LYONDELLBASELL INDUSTRIES N V COM USD0.0, LYB, N53745100									
Sale	01/28/13	10/25/12	25.000	1,536.84	1,343.08	193.76			
Sale	01/28/13	12/06/12	20.000	1,229.47	1,038.92	190.55			
Subtotals				2,766.31	2,382.00				
MACYS INC, M, 55616P104									
Sale	03/07/13	07/23/12	190.000	7,874.37	6,614.68	1,259.69			
MARSH & MCLENNAN COS, MMC, 571748102									
Sale	01/28/13	12/28/12	75.000	2,618.58	2,578.19	40.39			
Sale	01/28/13	01/09/13	45.000	1,571.15	1,568.46	2.67			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. **Z66-084301** Customer Service: 800-544-4442
 Recipient ID No. **26-1475115** Payer's Fed ID Number. 04-3523567

FORM 1099-B 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient. OMB NO. 1545-0715

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
MARSH & MCLENNAN COS, MMC, 571748102				4,189.73	4,146.67			
Subtotals								
MCDONALDS CORP, MCD, 580135101								
Sale	01/28/13	06/15/12	50,000	4,708.45	4,522.48			185.97
MCKESSON CORP, MCK, 56155Q103								
Sale	03/07/13	05/03/12	15,000	1,635.72	1,363.87			271.85
Sale	03/07/13	05/31/12	50,000	5,452.38	4,379.50			1,072.86
Subtotals				7,088.10	5,743.37			
MEDTRONIC INC, MDT, 585055106								
Sale	03/07/13	09/25/12	130,000	5,942.58	5,671.68			270.90
Sale	03/07/13	11/12/12	35,000	1,599.93	1,458.10			141.83
Subtotals				7,542.51	7,129.78			
MERCK & CO INC NEW COM, MRK, 58933Y105								
Sale	01/28/13	08/06/12	60,000	2,581.19	2,672.72			-91.53
Sale	01/28/13	09/25/12	50,000	2,151.00	2,265.82			-114.82
Subtotals				4,732.19	4,938.54			
MGM RESORTS INTERNATIONAL, MGM, 552953101								
Sale	01/28/13	02/28/12	100,000	1,292.86	1,355.00			-62.14
Sale	01/28/13	04/05/12	75,000	969.65	1,022.39			-52.74
Sale	01/28/13	06/14/12	100,000	1,292.87	1,104.36			188.51
Subtotals				3,555.38	3,481.75			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION
 Account No. Z66-084301 Customer Service 800-544-4442
 Recipient ID No. 28-1476115 Payer's Fed ID Number 04-3523567

Copy B for Recipient OMB NO. 1545-0715

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Short-term transactions for which basis is not reported to the IRS -- report on Form 8949 with Box B checked and/or Schedule D, Part I
 (This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
NATIONAL OILWELL VARCO INC, NOV, 637071101									
Sale	03/07/13	03/28/12	40.000	2,705.94	3,105.97	-400.03			
Sale	03/07/13	04/12/12	15.000	1,014.73	1,204.22	-189.49			
Subtotals				3,720.67	4,310.19				
NV ENERGY INC COM, 67073Y106									
Sale	01/28/13	07/25/12	125.000	2,335.16	2,223.93	111.23			
Sale	01/28/13	07/25/12	50.000	935.98	889.57	46.41			
Subtotals				3,271.14	3,113.50				
PARTNERRE COM STK USD1, PRE, G6852T105									
Sale	01/28/13	11/14/12	35.000	2,970.83	2,751.34	219.49			
PETSMART INC, PETM, 716768106									
Sale	01/28/13	01/09/13	35.000	2,223.60	2,387.29	-163.69			
PHILIP MORRIS INTL INC COM, PM, 718172109									
Sale	03/07/13	05/21/12	40.000	3,661.12	3,379.92	281.20			
Sale	03/07/13	08/28/12	55.000	5,034.04	5,005.92	28.12			
Sale	03/07/13	09/12/12	15.000	1,372.92	1,313.71	59.21			
Sale	03/07/13	11/12/12	20.000	1,830.55	1,705.21	125.34			
Subtotals				11,898.63	11,404.76				
PRECISION CASTPARTS CORP, PCP, 740189105									
Sale	01/28/13	03/01/12	10.000	1,874.31	1,688.65	185.66			
Sale	01/28/13	08/27/12	10.000	1,874.30	1,643.98	230.32			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. Z66-084301 Customer Service: 800-544-4442
 Recipient ID No. 26-1475116 Payer's Fed ID Number: 04-3523567

FORM 1099-B

2013 Proceeds from Broker and Barter Exchange Transactions

Copy B to Recipient: CMB NC. 15450715

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
PRECISION CASTPARTS CORP, PCP, 740189105				3,748.61	3,332.63				
Subtotals						313.09			
PROCTER & GAMBLE CO, PG, 742718109									
Sale	01/28/13	05/21/12	30.000	2,210.29	1,897.20				
PULTEGROUP INC FORMERLY PULTE CORP TO 05, PHM, 745867101									
Sale	01/28/13	09/06/12	135.000	2,807.70	1,956.14	851.56			
Sale	01/28/13	09/12/12	90.000	1,871.80	1,405.17	466.63			
Subtotals				4,679.50	3,361.31				
PVR PARTNERS L P COM UNIT REPTG LTD PART, PVR, 693665101									
Sale	10/14/13	02/01/13	300.000	7,715.87	8,013.00	-297.13			
Sale	10/14/13	02/01/13	900.000	23,147.59	24,057.00	-909.41			
Subtotals				30,863.46	32,070.00				
REYNOLDS AMERN INC, RAI, 761713106									
Sale	01/28/13	05/22/12	65.000	2,853.19	2,691.65	161.54			
Sale	01/28/13	11/12/12	30.000	1,316.86	1,225.37	91.49			
Subtotals				4,170.05	3,917.02				
SCHLUMBERGER LIMITEDCOM STK USD0.01, SLB, 806857106									
Sale	03/07/13	08/20/12	30.000	2,324.65	2,231.73	92.92			
SHERWIN WILLIAMS CO, SHW, 824348106									
Sale	03/07/13	06/01/12	35.000	5,754.57	4,376.54	1,378.03			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No Z69-084301 Customer Service: 800-544-4442
 Recipient ID No. 26-1476115 Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I
 (This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	5 Wash Sale Disallowed	6 Gain/Loss (-)	4 Federal Income Tax Withheld	13 State Income Tax Withheld
SMUCKER J M CO NEW, SJM, 832696405									
Sale	03/07/13	01/10/13	45,000	4,358.15	4,041.90		316.25		
Sale	03/07/13	01/11/13	15,000	1,452.72	1,328.93		123.79		
Subtotals				5,810.87	5,370.83				
STARBUCKS CORP, SBUX, 855244109									
Sale	03/07/13	11/21/12	25,000	1,439.72	1,261.55		178.17		
STARZ LIBERTY CAP COM SER A, STRZA, 85571Q102									
Sale	01/28/13	10/25/12	25,000	398.04	317.69		80.35		
TIBCO SOFTWARE INC, TIBX, 88693Q103									
Sale	01/28/13	03/19/12	5,000	120.29	154.28		-33.99		
Sale	01/28/13	04/10/12	45,000	1,082.65	1,461.17		-378.52		
Sale	01/28/13	05/29/12	50,000	1,202.94	1,385.00		-182.06		
Sale	01/28/13	08/22/12	50,000	1,202.94	1,441.57		-238.63		
Subtotals				3,608.82	4,442.02				
TIME WARNER INC NEW COM NEW, TWX, 887317303									
Sale	01/28/13	08/02/12	105,000	5,249.38	4,255.72		993.66		
Sale	01/28/13	08/20/12	40,000	1,999.76	1,710.14		289.62		
Subtotals				7,249.14	5,965.86				
TJX COMPANIES INC, TJX, 872540109									
Sale	03/07/13	10/03/12	60,000	2,684.93	2,712.89		-27.96		
Sale	03/07/13	10/03/12	100,000	4,475.39	4,521.48		-46.09		

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. Z66-084301 Customer Service: 800-544-4442
 Recipient ID No. 26-1475115 Payer's Fed ID Number 04-3523567

FORM 1099-B 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient: OMB NO. 1545-0715

Short-term transactions for which basis is not reported to the IRS—report on Form 8949 with Box B checked and/or Schedule D, Part I
 (This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	5 Wash Sale Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
TJX COMPANIES INC, TJX, 872540109								
Subtotals				7,160.32	7,234.37			
TYSON FOODS INC CL AFFRMLY COM, TSN, 902494103								
Sale	03/07/13	05/22/12	65,000	1,559.31	1,262.27	297.04		
Sale	03/07/13	09/19/12	85,000	2,039.10	1,411.96	627.14		
Sale	03/07/13	10/11/12	75,000	1,799.21	1,217.26	581.95		
Subtotals				5,397.62	3,891.49			
ULTA SALON COSMETICS & FRAGRANCE INC COM, ULTA, 90364S303								
Sale	01/28/13	12/04/12	19,000	1,877.16	1,910.45	-33.27		
Sale	01/28/13	12/14/12	21,000	2,074.78	1,989.30	85.48		
Subtotals				3,951.96	3,899.75			
UNION PACIFIC CORP, UNP, 907818108								
Sale	03/07/13	06/22/12	35,000	4,794.19	4,023.21	770.98		
Sale	03/07/13	08/22/12	30,000	4,109.31	3,731.79	377.52		
Subtotals				8,903.50	7,755.00			
UNITEDHEALTH GROUP, UNH, 91324P102								
Sale	03/07/13	04/12/12	10,000	540.34	583.78	-43.44		
Sale	03/07/13	04/12/12	10,000	540.28	583.78	-43.50		
Subtotals				1,080.62	1,167.56			
US BANCORP DEL COM NEW, USB, 902973304								
Sale	01/28/13	06/12/12	75,000	2,484.73	2,285.90	198.83		
Sale	01/28/13	09/20/12	25,000	826.24	826.93	1.31		

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. Z66-084301 Customer Service: 800-544-4442
 Recipient ID No. 26-1473115 Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I
 (This label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld	16 State Tax Withheld
US BANCORP DEL COM NEW, USB, 902973304										
Sale	01/28/13	08/20/12	50.000	1,659.97	1,653.87	6.10				
Subtotals				4,972.94	4,766.70					
VERIZON COMMUNICATIONS, VZ, 92343V104										
Sale	01/28/13	07/18/12	80.000	3,412.83	3,665.64	-252.81				
Sale	01/28/13	08/17/12	30.000	1,279.81	1,322.97	-43.16				
Subtotals				4,692.64	4,988.61					
VERTEX PHARMACEUTICALS INC, VRTX, 92532F100										
Sale	01/28/13	11/05/12	45.000	2,065.15	2,073.30	-8.15				
VISA INC COM CL A, V, 92826C839										
Sale	03/07/13	06/26/12	55.000	8,616.91	6,767.14	2,049.77				
WALMART STORES INC, WMT, 931142103										
Sale	03/07/13	05/21/12	55.000	4,034.71	3,460.56	574.15				
Sale	03/07/13	08/16/12	40.000	2,934.33	2,884.50	49.83				
Subtotals				6,969.04	6,345.06					
WELLPOINT INC, WLP, 94973V107										
Sale	03/07/13	05/17/12	50.000	3,133.38	3,295.50	-162.12				
WELLS FARGO & CO NEW, WFC, 949746101										
Sale	03/07/13	03/14/12	64.000	2,326.51	2,126.58	199.93				
Sale	03/07/13	03/21/12	100.000	3,635.17	3,423.39	211.78				
Sale	03/07/13	03/26/12	100.000	3,635.16	3,422.92	212.24				

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2013 TAX REPORTING STATEMENT

Account No Z66-084301 Customer Service 800-544-4442
 Recipient ID No 26-1475115 Payer's Fed ID Number 04-3523567

THE KALMAN FOUNDATION

Copy B for Recipient OMB NO 1545-0715

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II
 (This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
ALTRIA GROUP INC, MO, 02209S103									
Sale	03/07/13	03/22/11	100 000	3,388 37	2,547 57	840 80			
APPLIED MATERIALS INC, AMAT, 038222105									
Sale	03/07/13	10/13/11	100 000	1,367 46	1,144 34	223 12			
Sale	03/07/13	10/13/11	25 000	341 74	286 08	55 66			
Sale	03/07/13	11/25/11	100 000	1,366 97	1,035 68	331 29			
Sale	03/07/13	01/09/12	150 000	2,050 45	1,676 63	373 82			
Sale	03/07/13	02/01/12	100 000	1,366 97	1,255 98	110 99			
Subtotals				6,493.59	5,398.71				
AT&T INC COM, T, 00206R102									
Sale	01/28/13	04/06/11	5 000	170 68	152 73	17 95			
Sale	01/28/13	04/12/11	75 000	2,560 18	2,285 78	274 40			
Subtotals				2,730.86	2,438.51				
BP PLC ADR (CNV INTO6 ORD USD0 25 SHS), BP, 055622104									
Sale	03/07/13	09/15/11	100 000	4,068 36	3,930 67	137 69			
Sale	03/07/13	10/07/11	25 000	1,017 09	926 76	90 33			
Sale	03/07/13	10/10/11	25 000	1,017 09	954 43	62 66			
Sale	03/07/13	10/11/11	25 000	1,017 09	953 65	63 44			
Sale	03/07/13	10/24/11	25 000	1,017 09	1,039 75	-22 66			
Sale	03/07/13	10/27/11	25 000	1,017 09	1,124 24	-107 15			
Subtotals				9,153.81	8,929.50				

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. **Z86-084301** Customer Service: 800-544-4442
 Recipient ID No **26-1475115** Payer's Fed ID Number 04-3523567

Copy B for Recipient OMB NO: 1545-0715

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
CISCO SYS INC, CSCO, 17275R102									
Sale	03/07/13	12/23/11	20,000	437.49	365.40	72.09			
Sale	03/07/13	02/07/12	120,000	2,624.94	2,430.60	194.34			
Sale	03/07/13	02/08/12	50,000	1,093.73	1,008.59	85.14			
Sale	03/07/13	03/01/12	54,000	1,181.22	1,072.87	108.35			
Subtotals				5,337.38	4,877.46				
CIT GROUP INC NEW COM NEW, CIT, 125581801									
Sale	01/28/13	12/15/11	55,000	2,232.60	1,876.80	355.80			
Sale	01/28/13	01/09/12	55,000	2,232.60	1,978.82	253.78			
Subtotals				4,465.20	3,855.62				
CITIGROUP INC COM NEW, C, 172967424									
Sale	01/28/13	04/19/11	10,000	424.06	447.43	-23.37			
Sale	01/28/13	04/28/11	60,000	2,544.39	2,733.96	-189.57			
Sale	01/28/13	05/16/11	30,000	1,272.19	1,238.15	34.04			
Sale	01/28/13	05/19/11	50,000	2,120.32	2,068.64	51.68			
Sale	01/28/13	07/21/11	75,000	3,180.48	2,965.72	214.76			
Sale	01/28/13	07/22/11	50,000	2,120.32	2,008.97	111.35			
Sale	01/28/13	11/28/11	75,000	3,180.49	1,894.82	1,285.67			
Subtotals				14,842.25	13,357.69				
CITRIX SYSTEMS INC, CTXS, 177376100									
Sale	03/07/13	12/03/10	20,000	1,113.72	1,060.60	53.12			
Sale	03/07/13	02/28/11	20,000	1,484.97	1,393.88	91.09			

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2013 TAX REPORTING STATEMENT

THE KALLMAN FOUNDATION
 Account No Z66-084301 Customer Service 800-544-4442
 Recipient ID No 26-1475115 Payer's Fed ID Number 04-3523567

FORM 1099-B

2013 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions for which basis is not reported to the IRS -- report on Form 8949 with Box E checked and/or Schedule D, Part II

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	15 State Tax Withheld
CITRIX SYSTEMS INC, CTXS, 177376100								
Sale	03/07/13	05/19/11	25 000	1,856 21	2,074 36	-218 15		
Sale	03/07/13	07/05/11	15 000	1,113 72	1,211 49	-97 77		
Subtotals				5,568.62	5,740.33			
COMCAST CORP NEW CL A, CMCSA, 20030N101								
Sale	03/07/13	03/30/11	60 000	2,451 20	1,481 90	969 30		
Sale	03/07/13	04/05/11	75 000	3,064 00	1,887 54	1,176 46		
Subtotals				5,515.20	3,369.44			
DANAHER CORP, DHR, 235851102								
Sale	01/28/13	09/09/09	35 000	2,113 83	1,154 78	959 05		
Sale	01/28/13	02/08/10	30 000	1,811 85	1,058 96	752 89		
Sale	01/28/13	03/17/11	40 000	2,415 80	2,000 51	415 29		
Subtotals				6,341.48	4,214.25			
DELTA AIR LINES INC DEL COM NEW, DAL, 247361702								
Sale	01/28/13	01/28/11	25 000	347 45	301 80	45 65		
Sale	01/28/13	02/08/11	100 000	1,389 80	1,186 08	203 72		
Sale	01/28/13	07/18/11	125 000	1,737 25	992 40	744 85		
Subtotals				3,474.50	2,480.28			
DISNEY WALT CO, DIS, 254687106								
Sale	01/28/13	06/24/10	30 000	1,631 55	1,012 87	618 68		
Sale	01/28/13	04/06/11	25 000	1,359 63	1,056 39	303 24		
Sale	01/28/13	08/10/11	60 000	3,263 11	1,871 67	1,391 44		

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No. Z66-084301 Customer Service 800-544-4442
 Recipient ID No. 26-1475115 Payer's Fed ID Number 04-3523567

FORM 1099-B*

2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO. 1545-0715

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II
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(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
DISNEY WALT CO, DIS, 254687106				6,254.29	3,940.93			
Subtotals								
EOG RESOURCES INC, EOG, 26875P101								
Sale	01/28/13	10/08/10	3.000	371.81	297.50	74.31		
Sale	01/28/13	07/20/11	15.000	1,859.02	1,564.29	294.73		
Subtotals				2,230.83	1,861.79			
GOOGLE INC-CL A, GOOG, 38259P508								
Sale	03/07/13	06/27/08	2.000	1,665.58	1,050.61	614.97		
Sale	03/07/13	03/01/10	3.000	2,498.36	1,593.14	905.24		
Sale	03/07/13	03/01/10	2.000	1,665.58	1,062.10	603.48		
Sale	03/07/13	03/31/11	6.000	4,996.75	3,522.36	1,474.39		
Subtotals				10,826.29	7,228.21			
HARLEY DAVIDSON INC COM, HOG, 412822108								
Sale	01/28/13	10/24/11	30.000	1,596.28	1,162.67	433.61		
Sale	01/28/13	10/27/11	25.000	1,330.23	989.89	340.34		
Sale	01/28/13	11/02/11	25.000	1,330.24	967.31	362.93		
Subtotals				4,256.75	3,119.87			
HEALTH NET INC COM, HNT, 42222G108								
Sale	01/28/13	11/09/10	25.000	1,997.51	2,158.82	-161.31		
HEWLETT-PACKARD CO DE, HPQ, 428235103								
Sale	03/07/13	06/26/10	10.000	209.83	462.51	-252.68		
Sale	03/07/13	06/29/10	25.000	524.56	1,120.09	-595.53		

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2013 TAX REPORTING STATEMENT

Account No Z66-084301 Customer Service 800-544-4442
 Recipient ID No 26-1475115 Payer's Fed ID Number 04-3523667

THE KALMAN FOUNDATION

Copy B for Recipient OMB NO 1545-0715

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	15 State Tax Withheld
HEWLETT-PACKARD CO DE, HPQ, 428236103									
Sale	03/07/13	07/09/10	20 000	419 65	907 64	-487 99			
Sale	03/07/13	02/23/11	25 000	524 56	1,079 50	-554 94			
Sale	03/07/13	02/24/11	20 000	419 65	854 72	-435 07			
Sale	03/07/13	05/20/11	50 000	1,049 13	1,814 26	-765 13			
Sale	03/07/13	08/08/11	100 000	2,098 25	3,151 72	-1,053 47			
Sale	03/07/13	08/19/11	50 000	1,049 13	1,176 11	-126 98			
Sale	03/07/13	08/22/11	50 000	1,049 13	1,231 97	-182 84			
Sale	03/07/13	11/23/11	50 000	1,049 13	1,296 31	-247 18			
Subtotals				8,393.02	13,094.83				
INTUIT INC, INTU, 461202103									
Sale	03/07/13	02/09/11	10 000	679 08	489 78	189 30			
Sale	03/07/13	03/08/11	25 000	1,697 71	1,308 05	389 66			
Sale	03/07/13	08/23/11	20 000	1,358 17	889 31	468 86			
Sale	03/07/13	10/07/11	20 000	1,358.17	971.65	386.52			
Subtotals				5,093.13	3,658.79				
KROGER CO, KR, 501044101									
Sale	03/07/13	02/02/11	5 000	152 17	108 43	43 74			
Sale	03/07/13	02/24/11	95 000	2,891.26	2,181 20	710 06			
Sale	03/07/13	02/24/11	100 000	3,043.29	2,296 00	747 29			
Sale	03/07/13	11/04/11	50 000	1,521 65	1,128 74	392 91			
Sale	03/07/13	02/03/12	150 000	4,564 94	3,606 00	958 94			

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No Z66-084301 Customer Service 800-544-4442
 Recipient ID No 26-1475115 Payer's Fed ID Number 04-3523567

FORM 1099-B*

2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO. 1545-0715

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II
 (This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
KROGER CO, KR, 501044101									
Subtotals				12,173.31	9,320.37				
LORILLARD INC COM, LO, 544147101									
Sale	03/07/13	08/11/11	45 000	1,710.25	1,509.83	200.42			
Sale	03/07/13	10/05/11	5 000	190.03	185.77	4.26			
Sale	03/07/13	10/05/11	70 000	2,659.94	2,600.77	59.17			
Sale	03/07/13	10/28/11	30 000	1,139.97	1,146.01	-6.04			
Subtotals				5,700.19	5,442.38				
LYONDELBASELL INDUSTRIES N V COM USD0 0, LYB, N53745100									
Sale	01/28/13	05/23/11	5 000	305.36	59.44	245.92			
Sale	01/28/13	10/19/11	15 000	916.06	414.78	501.28			
Sale	01/28/13	10/19/11	55 000	3,381.05	1,520.85	1,860.20			
Subtotals				4,602.47	1,995.07				
MGM RESORTS INTERNATIONAL, MGM, 552953101									
Sale	01/28/13	01/11/12	250 000	3,232.16	2,955.60	276.56			
MICRON TECHNOLOGY, MU, 595112103									
Sale	01/28/13	10/26/11	100 000	774.44	538.49	235.95			
Sale	01/28/13	10/26/11	200 000	1,563.96	1,076.98	486.98			
Sale	01/28/13	10/26/11	25 000	195.57	134.62	60.95			
Sale	01/28/13	11/14/11	175 000	1,368.99	930.95	438.04			
Subtotals				3,902.96	2,681.04				

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2013 TAX REPORTING STATEMENT

Account No. Z66-084301 Customer Service: 800-544-4442
Recipient ID No. 26-1476115 Payer's Fed ID Number 04-3523567

THE KALMAN FOUNDATION

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FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

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NATIONAL OILWELL VARCO INC, NOV, 637071101									
Sale	03/07/13	02/14/12	4,000	270.59	334.08	-63.49			
Sale	03/07/13	02/16/12	16,000	1,082.38	1,341.66	-259.28			
Subtotals				1,352.97	1,675.74				
NOBLE ENERGY INC COM, NBL, 655044105									
Sale	03/07/13	02/15/11	15,000	1,673.21	1,310.55	362.66			
Sale	03/07/13	03/07/11	20,000	2,230.95	1,861.44	369.51			
Sale	03/07/13	05/17/11	15,000	1,673.21	1,309.48	363.73			
Sale	03/07/13	12/28/11	15,000	1,673.21	1,413.53	259.68			
Subtotals				7,250.58	5,895.00				
NV ENERGY INC COM, 67073Y106									
Sale	01/28/13	08/17/11	15,000	280.22	217.85	62.37			
Sale	01/28/13	10/05/11	60,000	1,120.88	852.82	268.06			
Subtotals				1,401.10	1,070.67				
PRECISION CASTPARTS CORP, PCP, 740189105									
Sale	01/28/13	06/22/11	5,000	937.16	794.39	142.77			
Sale	01/28/13	09/15/11	6,000	1,124.59	1,013.42	111.17			
Sale	01/28/13	09/30/11	14,000	2,624.04	2,190.72	433.32			
Sale	01/28/13	11/21/11	10,000	1,874.31	1,544.95	329.36			
Subtotals				6,560.10	5,543.48				

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No **Z66-084301** Customer Service 800-544-4442
 Recipient ID No **26-1475115** Payer's Fed ID Number 04-3523567

Copy B for Recipient OMB NO. 1545-0715

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

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SCHLUMBERGER LIMITEDCOM STK USD0.01, SLB, 806857108									
Sale	03/07/13	03/04/10	30 000	2,324 65	1,888 29	436 36			
Sale	03/07/13	04/21/10	25 000	1,937 21	1,700 42	236 79			
Sale	03/07/13	05/25/11	15 000	1,162 32	1,263 59	-101 27			
Sale	03/07/13	12/22/11	15 000	1,162 32	1,019 21	143 11			
Sale	03/07/13	01/10/12	15 000	1,162 32	1,062 85	99 47			
Subtotals				7,748.82	6,934.36				
STARBUCKS CORP, SBUX, 855244109									
Sale	03/07/13	10/07/10	30 000	1,727 66	779 94	947 72			
Sale	03/07/13	11/01/10	50 000	2,879 44	1,435 91	1,443 53			
Sale	03/07/13	04/29/11	35 000	2,015 60	1,268 70	746 90			
Subtotals				6,622.70	3,484.55				
TIME WARNER CABLE INC COM, TWC, 88732J207									
Sale	01/28/13	05/08/09	17 000	1,715 39	602 38	1,113 01			
Sale	01/28/13	07/07/09	29 000	2,926 26	884 41	2,041 85			
Sale	01/28/13	11/07/11	19 000	1,917 21	1,175 97	741 24			
Subtotals				6,558.86	2,662.76				
UNITEDHEALTH GROUP, UNH, 91324P102									
Sale	03/07/13	08/08/11	15 000	810 51	639 61	170 90			
Sale	03/07/13	08/11/11	25 000	1,350 84	1,070 31	280 53			
Sale	03/07/13	08/12/11	25 000	1,350 84	1,122 29	228 55			
Sale	03/07/13	11/03/11	25 000	1,350 84	1,155 99	194 85			

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THE KALMAN FOUNDATION

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UNITEDHEALTH GROUP, UNH, 91324P102										
Subtotals				4,863.03	3,988.20					
VIACOM INC NEW CL B, VIAB, 92553P201										
Sale	01/28/13	12/15/10	45,000	2,646.63	1,743.09	903.54				
Sale	01/28/13	05/31/11	30,000	1,764.42	1,505.92	258.50				
Sale	01/28/13	06/13/11	25,000	1,470.36	1,187.03	283.33				
Sale	01/28/13	06/13/11	20,000	1,177.77	949.63	228.14				
Subtotals				7,059.18	5,385.67					
WELLPOINT INC, WLP, 94973V107										
Sale	03/07/13	04/13/11	35,000	2,193.37	2,425.17	-231.80				
Sale	03/07/13	04/26/11	25,000	1,566.69	1,826.03	-259.34				
Sale	03/07/13	04/28/11	25,000	1,566.69	1,904.22	-337.53				
Sale	03/07/13	05/31/11	15,000	940.01	1,166.19	-226.18				
Sale	03/07/13	08/12/11	15,000	940.01	912.99	27.02				
Sale	03/07/13	02/06/12	25,000	1,566.69	1,617.85	-51.16				
Subtotals				8,773.46	9,852.45					
WELLS FARGO & CO NEW, WFC, 949746101										
Sale	03/07/13	02/10/12	70,000	2,544.62	2,115.90	428.72				
Sale	03/07/13	02/13/12	55,000	1,999.34	1,686.56	312.78				
Subtotals				4,543.96	3,802.46					

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2013 TAX REPORTING STATEMENT

THE KALMAN FOUNDATION

Account No Z66-084301 Customer Service 800-544-4442
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Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld	15 State Tax Withheld
TOTALS				198,708.93	164,962.40	40,804.41		0.00		
Box E Long-Term Realized Gain						40,804.41				
Box E Long-Term Realized Loss						-7,057.88				
Box E Wash Sale Loss Disallowed							0.00			

For any transaction listed on Form 1099-B in a section indicating that "basis is reported to the IRS", we are reporting to the IRS 1c type of gain or loss (i.e. short-term or long-term), 6 basis reported to IRS, 8 Description, 1d Stock or other symbol, the CUSIP number, and columns 1a, 1b, 1e, 2a and 2b, 3, 4, 5, 13, 14 and 15. We are not reporting to the IRS the Action, the Gain / Loss, and all subtotals and totals.

For any transaction listed on Form 1099-B in a section indicating that "basis is not reported to the IRS", we are reporting to the IRS 6 Noncovered security 8 Description, 1d Stock or other symbol, the CUSIP number, and columns 1a, 1e, 2a and 2b, 4, 13, 14 and 15. We are not reporting to the IRS 1c type of gain or loss (i.e. short-term or long-term), the Action, the Gain / Loss, columns 1b, 3, 5, and all subtotals and totals.

Although Fidelity makes every effort to provide accurate information, please bear in mind that you, the taxpayer, are ultimately responsible for the accuracy of your tax returns.

- (a) Gross proceeds less commissions
 - (b) Cost or other basis provided may include adjustments including, but not limited to, dividend reinvestment, return of capital/principal, wash sale loss disallowed, amortization, accretion, acquisition premium, bond premium, market discount, market premium, and option premium
- Amortization, accretion, and similar adjustments to cost basis are not provided for short-term instruments, unit investment trusts, or securities of foreign issuers.

* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Capital Gains Report

THE KALMAN FOUNDATION (Account: 888-40069)

January 1, 2013 through December 31, 2013

Open Date	Close Date	Quantity	Description	Sale Price	Unit Cost	Total Proceeds	Total Cost	Gain or Loss
SHORT-TERM NON-COVERED								
08/07/2012	01/04/2013	55	CLOROX COMPANY	74.27	70.87	4,084.60	3,897.80	186.80
08/17/2012	01/04/2013	25	CLOROX COMPANY	74.27	72.20	1,856.63	1,805.00	51.63
05/31/2012	01/09/2013	20	INTL BUSINESS MACHINES CORP	191.94	193.60	3,838.84	3,871.95	-33.11
10/25/2012	01/09/2013	15	LIBERTY MEDIA CORP - LIBER-A	121.26	110.99	1,818.90	1,664.92	153.98
01/11/2012	01/09/2013	100	MGM RESORTS INTERNATIONAL	12.91	11.82	1,291.25	1,182.24	109.01
11/14/2012	01/10/2013	15	***PARTNERRE LTD	83.14	78.61	1,247.03	1,179.15	67.88
08/22/2012	01/10/2013	20	UNITED TECHNOLOGIES CORP	84.70	79.45	1,693.93	1,589.10	104.83
09/07/2012	01/10/2013	20	UNITED TECHNOLOGIES CORP	84.70	79.38	1,693.92	1,587.52	106.40
09/19/2012	01/11/2013	40	BB&T CORP	30.25	33.64	1,209.81	1,345.66	-135.85
06/01/2012	01/11/2013	15	SHERWIN-WILLIAMS CO/THE	160.89	125.04	2,413.34	1,875.66	537.68
03/19/2012	01/14/2013	50	TIBCO SOFTWARE INC	22.78	30.86	1,138.81	1,542.79	-403.98
12/12/2012	01/16/2013	23	BERNSTEIN EMERGING MARKETS	28.45	27.63	664.87	652.22	12.65
		.606	PORTFOLIO					
03/29/2012	01/24/2013	264	BERNSTEIN INTERNATIONAL	14.29	13.79	3,782.35	3,650.00	132.35
		.685	PORTFOLIO					
05/17/2012	01/24/2013	1	BERNSTEIN INTERNATIONAL	14.29	12.01	19.33	16.25	3.08
		.353	PORTFOLIO					
06/28/2012	01/24/2013	42	BERNSTEIN INTERNATIONAL	14.29	12.10	609.74	516.29	93.45
		.669	PORTFOLIO					
09/24/2012	01/24/2013	3	BERNSTEIN INTERNATIONAL	14.29	13.52	45.61	43.16	2.45
		.192	PORTFOLIO					
12/12/2012	01/24/2013	351	BERNSTEIN INTERNATIONAL	14.29	13.65	5,018.51	4,793.74	224.77
		.190	PORTFOLIO					
01/02/2013	01/24/2013	3	BERNSTEIN INTERNATIONAL	14.29	14.17	43.50	43.13	0.37
		.044	PORTFOLIO					
SUBTOTAL FOR SHORT-TERM NON-COVERED						32,470.97	31,256.58	1,214.39
LONG-TERM NON-COVERED								
06/27/2008	01/07/2013	2	GOOGLE INC-CL A	736.67	525.30	1,473.34	1,050.61	422.73
06/22/2011	01/07/2013	20	UNITEDHEALTH GROUP INC	52.03	52.26	1,040.51	1,045.26	-4.75
08/08/2011	01/07/2013	10	UNITEDHEALTH GROUP INC	52.03	42.64	520.25	426.41	93.84
09/30/2010	01/11/2013	80	ALTRIA GROUP INC	32.80	24.05	2,624.35	1,924.32	700.03
03/22/2011	01/11/2013	45	ALTRIA GROUP INC	32.80	25.48	1,476.19	1,146.41	329.78
04/09/2008	01/16/2013	527	BERNSTEIN EMERGING MARKETS	28.45	38.33	14,862.32	20,227.65	-5,365.33
		.678	PORTFOLIO					
12/01/2008	01/16/2013	473	BERNSTEIN EMERGING MARKETS	28.45	15.52	13,342.87	7,350.00	5,992.87
		.731	PORTFOLIO					
12/09/2008	01/16/2013	362	BERNSTEIN EMERGING MARKETS	28.45	14.72	10,201.18	5,331.39	4,869.79
		.187	PORTFOLIO					
12/08/2009	01/16/2013	16	BERNSTEIN EMERGING MARKETS	28.45	28.18	458.82	459.05	-0.23
		.290	PORTFOLIO					
12/07/2010	01/16/2013	16	BERNSTEIN EMERGING MARKETS	28.45	32.81	459.91	535.77	-75.86
		.329	PORTFOLIO					

Capital Gains Report

THE KALMAN FOUNDATION (Account: 888-40069)

January 1, 2013 through December 31, 2013

Open Date	Close Date	Quantity	Description	Sale Price	Unit Cost	Total Proceeds	Total Cost	Gain or Loss
02/25/2011	01/16/2013	202	BERNSTEIN EMERGING MARKETS	28.45	32.36	5,700.36	6,550.00	-849.64
		.388	PORTFOLIO					
09/20/2011	01/16/2013	123	BERNSTEIN EMERGING MARKETS	28.45	27.47	3,485.48	3,400.00	85.48
		.750	PORTFOLIO					
12/14/2011	01/16/2013	94	BERNSTEIN EMERGING MARKETS	28.45	23.91	2,659.67	2,257.83	401.84
		.430	PORTFOLIO					
03/19/2008	01/24/2013	523	BERNSTEIN INTERNATIONAL	14.29	21.25	7,483.40	11,128.22	-3,644.82
		.681	PORTFOLIO					
03/25/2008	01/24/2013	4,932	BERNSTEIN INTERNATIONAL	14.29	22.23	70,485.77	109,650.00	-39,164.23
		.524	PORTFOLIO					
04/02/2008	01/24/2013	4,634	BERNSTEIN INTERNATIONAL	14.29	23.00	66,231.05	106,600.00	-40,368.95
		.783	PORTFOLIO					
04/09/2008	01/24/2013	4,662	BERNSTEIN INTERNATIONAL	14.29	23.10	66,624.81	107,700.00	-41,075.19
		.338	PORTFOLIO					
04/14/2009	01/24/2013	389	BERNSTEIN INTERNATIONAL	14.29	10.91	5,566.68	4,250.00	1,316.68
		.551	PORTFOLIO					
01/19/2010	01/24/2013	258	BERNSTEIN INTERNATIONAL	14.29	15.66	3,695.69	4,050.00	-354.31
		.621	PORTFOLIO					
02/24/2010	01/24/2013	245	BERNSTEIN INTERNATIONAL	14.29	14.28	3,502.45	3,500.00	2.45
		.098	PORTFOLIO					
05/27/2010	01/24/2013	138	BERNSTEIN INTERNATIONAL	14.29	13.34	1,981.75	1,850.00	131.75
		.681	PORTFOLIO					
06/09/2010	01/24/2013	153	BERNSTEIN INTERNATIONAL	14.29	12.69	2,195.86	1,950.00	245.86
		.664	PORTFOLIO					
02/04/2011	01/24/2013	299	BERNSTEIN INTERNATIONAL	14.29	16.19	4,280.83	4,850.00	-569.17
		.568	PORTFOLIO					
02/24/2011	01/24/2013	154	BERNSTEIN INTERNATIONAL	14.29	15.90	2,201.92	2,450.00	-248.08
		.088	PORTFOLIO					
03/24/2011	01/24/2013	148	BERNSTEIN INTERNATIONAL	14.29	15.80	2,125.41	2,350.00	-224.59
		.734	PORTFOLIO					
07/06/2011	01/24/2013	231	BERNSTEIN INTERNATIONAL	14.29	15.76	3,309.55	3,650.00	-340.45
		.599	PORTFOLIO					
09/20/2011	01/24/2013	177	BERNSTEIN INTERNATIONAL	14.29	12.97	2,534.07	2,300.00	234.07
		.332	PORTFOLIO					
11/14/2011	01/24/2013	190	BERNSTEIN INTERNATIONAL	14.29	13.09	2,729.18	2,500.00	229.18
		.985	PORTFOLIO					
11/16/2011	01/24/2013	132	BERNSTEIN INTERNATIONAL	14.29	12.84	1,891.98	1,700.00	191.98
		.399	PORTFOLIO					
01/17/2012	01/24/2013	572	BERNSTEIN INTERNATIONAL	14.29	12.75	8,181.73	7,300.00	881.73
		.549	PORTFOLIO					
SUBTOTAL FOR LONG-TERM NON-COVERED						313,327.38	429,482.92	-116,155.54
TOTAL						345,798.35	460,739.50	-114,941.15

Capital Gains Report

THE KALMAN FOUNDATION (Account. 888-40069)

January 1, 2013 through December 31, 2013

Open Date	Close Date	Quantity	Description	Sale Price	Unit Cost	Total Proceeds	Total Cost	Gain or Loss	
** ACCOUNT TOTALS **									
CURRENT PERIOD - G/L							-114,941.15		
						0.00			
SHORT TERM - COVERED (COST BASIS REPORTED ON 1099-B)						0.00			
SHORT TERM - NON-COVERED (COST BASIS NOT REPORTED ON 1099-B)						1,214.39			
SHORT TERM TOTAL							1,214.39		
LONG TERM - COVERED (COST BASIS REPORTED ON 1099-B)						0.00			
LONG TERM - NON-COVERED (COST BASIS NOT REPORTED ON 1099-B)						-116,155.54			
LONG TERM TOTAL							-116,155.54		

Capital-Gains Distributions: If you own shares of the Sanford C. Bernstein Fund, Inc., you may have received an annual capital-gains distribution (different from the capital gains or losses on securities sold, which are listed in this report). Long-term capital-gains distributions are a separate item on the I.R.S. forms, and appear on the Summary-of-Key-Items report.

Zero-Cost Transactions: If you transferred securities to Bernstein for which the purchase price was unavailable, the total capital-gains figure that appears on this report needs to be adjusted. Any such transactions are segregated on the Capital-Gains report, with the cost entered as zero. You will need to update the report data with the correct purchase information.

This information should be reviewed by your tax advisor or accountant.