

See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490



990-PF

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

For calendar year 2013 or tax year beginning	obo-11 and its separat	, 2013, and ending	ovitomissopi. <u>G</u>	, 20
Name of foundation			A Employer identif	
THE ISAMBARD KINGDOM BRUNEL SOCI	ETY OF N.A.		26-431282	.7
Number and street (or P.O box number if mail is not delivered	to street address)	Room/suite	B Telephone numb	er (see instructions)
C/O PETER NORTON			(31	.0) 576-7701
225 ARIZONA AVENUE, SUITE 350			,	•
City or town, state or province, country, and ZIP or foreign post	al code			
			C If exemption application pending, check here	atron is
SANTA MONICA, CA 90401			pending, check here	
G Check all that apply: Initial return	Initial return o	of a former public charity	D 1. Foreign organiza	llone check here
Final return	Amended ret	•	2. Foreign organiza	··· •
Address change	Name change)	85% test, check t	nere and attach
H Check type of organization: X Section 501(c			1	
Section 4947(a)(1) nonexempt charitable trust	Other taxable pri		E If private foundation	n status was terminated
	inting method: X Ca			in a 60-month termination
	ner (specify))(1)(B), check here
	column (d) must be on	cash basis.)		
Part I Analysis of Revenue and Expenses (The	(a) Revenue and			(d) Disbursements
total of amounts in columns (b), (c), and (d)	expenses per		(c) Adjusted net	for charitable
may not necessarily equal the amounts in column (a) (see instructions).)	books	income	income	purposes (cash basis only)
				(GEGIT DEGIT GITTI)
if the foundation is not required to				
3 Interest on savings and temporary cash investments	97.	97.		ATCH 1
4 Dividends and interest from securities	212,950.	212,882.		ATCH 2
5 a Gross rents				
b Netrental income on loss)				
	946,916.	· · · · · · · · · · · · · · · · · · ·		
6 a Net gath or (loss) to be sale of assets not on line 10 b Gross sales price for all 4,944,976. assets on line 6a 7 Capital gath net income (from Part IV, line 2).				
Topels on line6a 7 Capital gen net income (from Part IV, line 2)		946,916.		
8 Net short-term/capital gain				
Income modifications · · · · · · ·				İ
MO a Come polos lore returns				
ang allowances between the Less: Cost of goods sold				
Gross profit or (loss) (allach schedule)				
11 Other income (attach schedule) ATCH 3	7,829.	7,829.		
12 Total. Add lines 1 through 11	1,167,792.	1,167,724.	·	
13 Compensation of officers, directors, trustees, etc.	d		·	
A4 Other ampleuse selectes and warms	· -			
9 15 Pension plans, employee benefits				- :::-
15 Pension plans, employee benefits			"	<u> </u>
b Accounting fees (attach schedule)ATCH 4	4,025.	4,025.		
c Other professional fees (attach schedule) .*.	23,869.	23,869.	·	
c Other professional fees (attach schedule).*.	15,678.	15,678.		
18 Taxes (attach schedule) (see instructions) ATCH 7	44,842.	5,706.		
19 Depreciation (attach schedule) and depletion				
Depreciation (attach schedule) and depletion. Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications			<u> </u>	·
23 Other expenses (attach schedule) ATCH . 8	33,725.	29,698.		3,985
Total operating and administrative expenses.				
Travel, conferences, and meetings Printing and publications Other expenses (attach schedule) ATCH .8 Total operating and administrative expenses. Add lines 13 through 23 Contributions, gifts, grants paid	122,139.	78,976.		3,985
25 Contributions, gifts, grants paid	1,000,550.			1,000,550
26 Total expenses and disbursements. Add lines 24 and 25	1,122,689.	78,976.	C	1,004,535
27 Subtract line 26 from line 12:		-,		, , , , , , , ,
I	45,103.			
a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)	,200	1,088,748.		
		2,000,100		
c Adjusted net income (if negative, enter -0-) JSA For Paperwork Reduction Act Notice, see instructions.		*ATCH 5		Form 990-PF(2013)

614

I.A.	26-4312827

	s and Losses for Tax on Inv				
(a) Liet an			(b) How	L (a) Data	
2-story b	ed describe the kind(s) of property sold prick warehouse; or common stock, 200	(e.g., real estate,	acquired P - Purchase	(c) Date acquired	(d) Date sold (mo., day, yr.)
1a SEE PART IV SCHE		5 5113. INIEO CO.)	D - Donation	(mo., day, yr.)	(, 0.2),)
b			 	 	
C			 	 	
d			 	-	
			<u> </u>	<u> </u>	
<u>e</u>	(6 Depreciation allowed	(a) Cost or other basis	 		L
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	ĺ	(h) Gain or (lo (e) plus (f) minu	
2	· · · · · · · · · · · · · · · · · · ·	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		(0) pius (i)	
b		,	 		
C			 		
d	***			 -	
e			 		· · · ·
	showing gain in column (h) and owne	ed by the foundation on 12/31/60			
	(j) Adjusted basis	(k) Excess of col. (i)		Gains (Col. (h) ga (k), but not less t	
(i) F.M.V. as of 12/31/69	as of 12/31/69	over col. (j), if any	001.	Losses (from co	
a			-		
b			 		
C				<u></u>	····
d			 		
e	 				
	C If	f gain, also enter in Part I, line 7			
2 Capital gain net income or		f (loss), enter -0- in Part I, line 7	2		946,916.
3 Net short-term capital gair	n or (loss) as defined in sections 1				
		tructions). If (loss), enter -0- in)			
Part I, line 8			3		0
Part V Qualification \	Under Section 4940(e) for Re	duced Tax on Net Investment I	ncome		· · · · ·
	the section 4942 tax on the distrit	butable amount of any year in the b	ase perio	40	
	not qualify under section 4940(e).			ur	Yes X No
				<u> </u>	Yes X No
(a) Base period years	ount in each column for each year	r; see the instructions before making	any entr	<u> </u>	Yes X No
Calendar year (or tax year beginning in)	(b)	(c)	any entr	ies.	
	(b) Adjusted qualifying distributions	(c) Net value of nonchantable-use assets	any entr	ies.	itio
2012	(b) Adjusted qualifying distributions 773,375.	(c) Net value of nonchantable-use assets 8,999,932.	any entr	ies. (d) Distribution ra (col. (b) divided by	tio col. (c)) 0.085931
2011	(b) Adjusted qualifying distributions 773,375. 1,332,237.	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643.	any entr	ies. (d) Distribution ra (col. (b) divided by	ntio col. (c)) 0.085931 0.135011
2011 2010	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932.	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681.	any entr	ies. (d) Distribution ra (col. (b) divided by	olio col. (c)) 0.085931 0.135011 0.177015
2011 2010 2009	(b) Adjusted qualifying distributions 773,375. 1,332,237.	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643.	any entri	ies. (d) Distribution ra (col. (b) divided by	ntio col. (c)) 0.085931 0.135011
2011 2010	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932.	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681.	any entri	ies. (d) Distribution ra (col. (b) divided by	olio col. (c)) 0.085931 0.135011 0.177015
2011 2010 2009 2008	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932. 112,865.	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681.	any entr	ies. (d) Distribution ra (col. (b) divided by	olio col. (c)) 0.085931 0.135011 0.177015 1.817033
2011 2010 2009 2008 2 Total of line 1, column (d)	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932. 112,865.	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681. 62,115.	any entr	ies. (d) Distribution ra (col. (b) divided by	olio col. (c)) 0.085931 0.135011 0.177015
2011 2010 2009 2008 2 Total of line 1, column (d) 3 Average distribution ratio	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932. 112,865. for the 5-year base period - divide	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681. 62,115. e the total on line 2 by 5, or by the		ies. (d) Distribution ra (col. (b) divided by	ntio col. (c)) 0.085931 0.135011 0.177015 1.817033
2011 2010 2009 2008 2 Total of line 1, column (d) 3 Average distribution ratio	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932. 112,865. for the 5-year base period - divide	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681. 62,115.		ies. (d) Distribution ra (col. (b) divided by	olio col. (c)) 0.085931 0.135011 0.177015 1.817033
2011 2010 2009 2008 2 Total of line 1, column (d) 3 Average distribution ratio number of years the found	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932. 112,865. for the 5-year base period - divided dation has been in existence if less	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681. 62,115. e the total on line 2 by 5, or by the s than 5 years	2	ies. (d) Distribution ra (col. (b) divided by	olio col. (c)) 0.085931 0.135011 0.177015 1.817033 2.214990 0.553748
2011 2010 2009 2008 2 Total of line 1, column (d) 3 Average distribution ratio number of years the found	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932. 112,865. for the 5-year base period - divide	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681. 62,115. e the total on line 2 by 5, or by the s than 5 years	2	ies. (d) Distribution ra (col. (b) divided by	ntio col. (c)) 0.085931 0.135011 0.177015 1.817033
2011 2010 2009 2008 2 Total of line 1, column (d) 3 Average distribution ratio number of years the found	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932. 112,865. for the 5-year base period - divided dation has been in existence if less ancharitable-use assets for 2013 from the content of the content	(c) Net value of nonchantable-use assets 8, 999, 932. 9, 867, 643. 3, 976, 681. 62, 115. e the total on line 2 by 5, or by the s than 5 years om Part X, line 5	2 3	ies. (d) Distribution ra (col. (b) divided by	0.085931 0.135011 0.177015 1.817033 2.214990 0.553748
2011 2010 2009 2008 2 Total of line 1, column (d) 3 Average distribution ratio number of years the found	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932. 112,865. for the 5-year base period - divided dation has been in existence if less ancharitable-use assets for 2013 from the content of the content	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681. 62,115. e the total on line 2 by 5, or by the s than 5 years	2 3	ies. (d) Distribution ra (col. (b) divided by	olio col. (c)) 0.085931 0.135011 0.177015 1.817033 2.214990 0.553748
2011 2010 2009 2008 2 Total of line 1, column (d) 3 Average distribution ratio number of years the found 4 Enter the net value of non 5 Multiply line 4 by line 3	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932. 112,865. for the 5-year base period - divided dation has been in existence if less ancharitable-use assets for 2013 from	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681. 62,115. e the total on line 2 by 5, or by the s than 5 years om Part X, line 5	2 3 4	ies. (d) Distribution ra (col. (b) divided by	0.085931 0.135011 0.177015 1.817033 2.214990 0.553748 162,629.
2011 2010 2009 2008 2 Total of line 1, column (d) 3 Average distribution ratio number of years the found 4 Enter the net value of non 5 Multiply line 4 by line 3	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932. 112,865. for the 5-year base period - divided dation has been in existence if less ancharitable-use assets for 2013 from	(c) Net value of nonchantable-use assets 8, 999, 932. 9, 867, 643. 3, 976, 681. 62, 115. e the total on line 2 by 5, or by the s than 5 years om Part X, line 5	2 3 4	ies. (d) Distribution ra (col. (b) divided by	0.085931 0.135011 0.177015 1.817033 2.214990 0.553748
2011 2010 2009 2008 2 Total of line 1, column (d) 3 Average distribution ratio number of years the found 4 Enter the net value of non 5 Multiply line 4 by line 3 6 Enter 1% of net investment	(b) Adjusted qualifying distributions 773, 375. 1, 332, 237. 703, 932. 112, 865. for the 5-year base period - divide dation has been in existence if less archaritable-use assets for 2013 from the income (1% of Part I, line 27b).	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681. 62,115. e the total on line 2 by 5, or by the s than 5 years om Part X, line 5	2 3 4 5	ies. (d) Distribution ra (col. (b) divided by	0.085931 0.135011 0.177015 1.817033 2.214990 0.553748 162,629. 073,787.
2011 2010 2009 2008 2 Total of line 1, column (d) 3 Average distribution ratio number of years the found 4 Enter the net value of non 5 Multiply line 4 by line 3 6 Enter 1% of net investment	(b) Adjusted qualifying distributions 773,375. 1,332,237. 703,932. 112,865. for the 5-year base period - divided dation has been in existence if less ancharitable-use assets for 2013 from	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681. 62,115. e the total on line 2 by 5, or by the s than 5 years om Part X, line 5	2 3 4 5	ies. (d) Distribution ra (col. (b) divided by	0.085931 0.135011 0.177015 1.817033 2.214990 0.553748 162,629.
2011 2010 2009 2008 2 Total of line 1, column (d) 3 Average distribution ratio number of years the found 4 Enter the net value of non 5 Multiply line 4 by line 3 6 Enter 1% of net investment	(b) Adjusted qualifying distributions 773, 375. 1, 332, 237. 703, 932. 112, 865. for the 5-year base period - divided dation has been in existence if less ancharitable-use assets for 2013 from the income (1% of Part I, line 27b).	(c) Net value of nonchantable-use assets 8,999,932. 9,867,643. 3,976,681. 62,115. e the total on line 2 by 5, or by the s than 5 years om Part X, line 5	2 3 4 5 6	ies. (d) Distribution ra (col. (b) divided by	0.085931 0.135011 0.177015 1.817033 2.214990 0.553748 162,629. 073,787.

Form 990-PF (2013)

JSA

charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013? | 4b | X
Form 990-PF (2013)

...

Page	

Part V	Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)						
3 F	ive highest-paid independent contractors for professional services (see instructions). If none, enter "NON	<u> </u>					
	(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation					
NO	ONE						
		<u> </u>					
		1					
Total n	umber of others receiving over \$50,000 for professional services						
Part I	X-A Summary of Direct Charitable Activities						
	Outstand of Direct Charles Front Floor						
	e foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of ations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses					
1 N/	/A						
~							
2							
~							
3							
4							
		L					
Part I							
$\overline{}$	be the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount					
1 _ N	ONE						
2							
All othe	er program-related investments. See instructions.						
3 NO	ONE						
V							
Total /	Add lines 1 through 3						
rotai. A	Add lines 1 through 3						

Form 990-PF (2013)

Form 990-PF (2013) Page 8 Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., Average monthly fair market value of securities 8,806,608. 1a 495,553. Average of monthly cash balances 1b Fair market value of all other assets (see instructions) 1c 9,302,161. d Total (add lines 1a, b, and c) 1d Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) _ _ _ _ _ _ 1e Acquisition indebtedness applicable to line 1 assets 3 3 9,302,161. Subtract line 2 from line 1d Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see 139,532. 4 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 9,162,629. 5 458,131. Minimum investment return. Enter 5% of line 5 6 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.) 458,131. Minimum investment return from Part X, line 6 21,775 Tax on investment income for 2013 from Part VI, line 5 ______ 2a Income tax for 2013. (This does not include the tax from Part VI.) 2b Add lines 2a and 2b 21,775. 2¢ 436,356. Distributable amount before adjustments. Subtract line 2c from line 1....... 3 Recoveries of amounts treated as qualifying distributions 4 436,356. 5 Deduction from distributable amount (see instructions) 6 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, 436,356. 7 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 1,004,535. Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a Program-related investments - total from Part IX-B 1b Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., 2 Amounts set aside for specific charitable projects that satisfy the: Suitability test (prior IRS approval required) 3a Cash distribution test (attach the required schedule) 3b

Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4

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)

Adjusted qualifying distributions. Subtract line 5 from line 4

qualifies for the section 4940(e) reduction of tax in those years.

Form 990-PF (2013)

1,004,535.

4

5

6

5

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation

	990-PF (2013)				Page 9
Pa	rt XIII Undistributed Income (see instru	ictions)			
1	Distributable amount for 2013 from Part XI,	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
	line 7				436,356.
2	Undistributed income, if any, as of the end of 2013:				
а	Enter amount for 2012 only				İ
b	Total for prior years: 20 11 ,20 10 ,20 09				
3	Excess distributions carryover, if any, to 2013:				
а	From 2008				
b	From 2009 109,764.				
С	From 2010 508, 413.				
d	From 2010 508, 413. From 2011 845, 964.				
е	From 2012 346, 317.				
	Total of lines 3a through e	1,810,458.			
4	Qualifying distributions for 2013 from Part XII,				
	line 4: ▶ \$1,004,535.				
а	Applied to 2012, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required - see instructions)				
С	Treated as distributions out of corpus (Election required - see instructions)				
	Applied to 2013 distributable amount				436,356.
	Remaining amount distributed out of corpus	568,179.		<u> </u>	
5	Excess distributions carryover applied to 2013				
6	(If an amount appears in column (d), the same amount must be shown in column (a).) Enter the net total of each column as indicated below:				
а	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	2,378,637.			_
b	Prior years' undistributed income. Subtract				
	line 4b from line 2b				
С	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				
e	amount - see instructions Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instructions				
f	Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8	Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)				
9	Excess distributions carryover to 2014.				
	Subtract lines 7 and 8 from line 6a	2,378,637.			
10)]		
а	Excess from 2009 109,764.				
b					
C	Excess from 2011 845, 964.				
đ	Excess from 2012 346, 317.				1
e	Excess from 2013 568, 179.			··	5 990 PE/2042

V 13-7.1F

	N.	A	•	
--	----	---	---	--

Form 990-PF (2013)				Page 11
Part XV Supplementary Information (continued)			
3 Grants and Contributions Paid Duri	ng the Vear or Anni	royed for F	Euturo Paymont	· · · · · · · · · · · · · · · · · · ·
Pacinient	If recipient is an individual.	Foundation	dure rayment	1
3 Grants and Contributions Paid Duri Recipient Name and address (home or business)	show any relationship to any foundation manager	status of	Purpose of grant or contribution	Amount
Name and address (nome or business)	or substantial contributor	recipient		
a Paid during the year		1	}	
SCHEDULE 1 ATTACHED		1		1,000,550.
			1	
				1
		ł		
		ļ	İ	
		İ		
		İ		
		İ		
		ļ		
		!	i	
			<u> </u>	
Total	,		▶ 3a	1,000,550.
b Approved for future payment				
		1		
		1		
			1	
			1	
			l	
			1	
		1	ĺ	

Form 990-PF (2013)

Total

Page 12

	Analysis of income-produ			Te		(0)
_	amounts unless otherwise indicated.	(a)	ated business income (b)	(c)	y section 512, 513, or 514 (d)	(e) Related or exempt function income
_	service revenue:	Business code	Amount	Exclusion code	Amount	(See instructions.)
				-		
					<u> </u>	
_						······································
f						
	and contracts from government agencies					
	ship dues and assessments					
	n savings and temporary cash investments			14	97.	
	Is and interest from securities al income or (loss) from real estate:			14	212,950.	
	-financed property					
b Not o	lebt-financed property					
	l income or (loss) from personal property					
	vestment income					T
	oss) from sales of assets other than inventory		-	18	946,916.	
	me or (loss) from special events	· · -				
	rofit or (loss) from sales of inventory	-				
11 Other rev	venue: a TCH 16		·	1	7,829.	
				-	1,029.	
						·
e						
12 Subtotal	. Add columns (b), (d), and (e)				1,167,792.	
13 Total. Ad	id line 12, columns (b), (d), and (e)				13	1,167,792.
	neet in line 13 instructions to verify calcu					·
Part XVI-	B Relationship of Activities	to the Ac	complishment of Ex	empt Purp	oses	·
Line No.	Explain below how each activity	y for which	n income is reported	in column (e	e) of Part XVI-A contribu	ted importantly to the
▼	accomplishment of the foundation	n's exemp	t purposes (other than	by providing	funds for such purposes). (See instructions.)
				··		
						<u> </u>
						· · · · · · · · · · · · · · · · · · ·
						
						
	- ,			<u> </u>	· · · · · · · · · · · · · · · · · · ·	
						··········
						
				· · ·		
					······································	
						
	<u> </u>					- 000 57
JSA						Form 990-PF (2013)

^{3E1492} 1.000 46X1CK 4316

V 13-7.1F

2100-14

PAGE 13

SAMBARD KINGDOM BRUNEL SOCIETY Form 990-PF (2013) Information Regarding Transfers To and Transactions and Relationships With Noncharitable Part XVII **Exempt Organizations** Did the organization directly or indirectly engage in any of the following with any other organization described Yes No in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? a Transfers from the reporting foundation to a noncharitable exempt organization of: X 1a(1) X (2) Other assets b Other transactions: Х Х 1b(4) 1b(5) (6) Performance of services or membership or fundraising solicitations c Sharing of facilities, equipment, mailing lists, other assets, or paid employees Х 1c d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. (a) Line no. (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements N/A N/A

	ls the foundation directly or indirectly affil described in section 501(c) of the Code (oth				N
	If "Yes," complete the following schedule.				
	(a) Name of organization	(b) Type of organization	(c) Desc	ription of relationship	
	<u> </u>		<u></u>		
	Under penalties of penury, I declare that I have examine correct, and complete. Declaration of preparer (other than tax	ed this return, including accompanying schedules a	and statements, and to the be as any knowledge	est of my knowledge and belief, it is	la
ign		Executive Director		May the IRS discuss this re	

S Here

Signature of officer or trustee

Title Date

X |Yes (see instructions)?

Paid Preparer **Use Only** Print/Type preparer's name Weiner STANLEY

Firm's name

Firm's address

WEINER, DURANSO

6026 SOUTH DURANGO DRIVE

LAS VEGAS,

PTIN Check self-employed Firm's EIN

P00071140 ▶ 88-0426657

89113-1790 702-242-3444 Phone no.

Form 990-PF (2013)

26-4312827

THE SAMBARD KINGDOM BRUNEL SOCIETY .N.A.

FORM 990-PF - PART IV CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME								
Kind of F				ription	1	<u> </u>	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
5,604.		354.71 MFO 5,594.	ABERDEEN FD	S EMERGING	MKTS FD		12/20/2012 10.	04/23/2013
2,353.		15.14 MFO V 1,967.	ANGUARD INS	TL INDEX FD	SH BEN		12/26/2012 386.	07/22/2013
9,932.		63.91 MFO V 9,146.	ANGUARD INS	TL INDEX FD	SH BEN		03/27/2013 786.	07/22/2013
11,253.		72.41 MFO V 10,695.	ANGUARD INS	TL INDEX FD	SH BEN		06/27/2013 558.	07/22/2013
12,478.		80.29 MFO V 10,454.	ANGUARD INS	TL INDEX FD	SH BEN		10/04/2012 2,024.	07/22/2013
150,000.		10869.57 MF 148,261.	O WHG INCOM	E OPPORTUNI	TY-INST		11/01/2013 1,739.	12/26/2013
47.		2.47 MFO DF 41.	A INTL SMAL	L CO PORTFO	LIO FD		03/08/2013 6.	12/26/2013
173.		9.13 MFO DF 167.	A INTL SMAL	L CO PORTFO	LIO FD		09/10/2013 6.	12/26/2013
1,360.		71.91 MFO D 1,320.	FA INTL SMA	LL CO PORTF	TOLIO FD		12/12/2013 40.	12/26/2013
5,029.		265.95 MFO 4,880.	DFA INTL SM	IALL CO PORT	FOLIO F		12/12/2013 149.	12/26/2013
5,255.		277.9 MFO D 4,669.	FA INTL SMA	LL CO PORTF	OLIO FD		06/10/2013 586.	12/26/2013
10,339.		546.74 MFO 10,033.	DFA INTL SM	IALL CO PORT	FOLIO F		12/12/2013 306.	12/26/2013
		:						

V 13-7.1F

THE ISAMBARD KINGDOM BRUNEL SOCIETY N.A.

26-4312827

FORM 990-PF - PART IV CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

		INS AND LO			INVESTI	VII P		
Kind of Property		Description					Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
10,208.		60.53 MFO V 9,416.	ANGUARD INS	TL INDEX FO	SH BEN		09/26/2013 792.	12/26/2013
10,781.		63.93 MFO V	ANGUARD INS	TL INDEX FO	SH BEN		12/26/2013	12/26/2013
150,000.		13297.87 MF	O WELLS FAR	GO FDS TR A	ADVANTAG		11/01/2013 665.	12/26/2013
150,052.		2555 MFC ISI 135,864.	HARES TR MS	CI EAFE INC	EX FD		02/02/2012 14,188.	03/25/2013
14,983.		96.41 MFO V	ANGUARD INS	TL INDEX FO	SH BEN		02/02/2012 3,276.	07/22/2013
220,000.		1412.43 MFO 171,511.	VANGUARD I	NSTL INDEX	FD SH B		02/02/2012 48,489.	09/25/2013
129,011.		765.01 MFO 92,895.	VANGUARD IN	STL INDEX F	D SH BE		02/02/2012 36,116.	12/26/2013
100,000.		7204.61 MFO 71,326.	IRONBRIDGE	FDS INC SM	IID CAP		02/18/2005 28,674.	03/22/2013
510,396.		32303.57 MF0 290,732.	O ABERDEEN	FDS EMERGIN	IG MKTS		06/03/2009 219,664.	04/23/2013
100,000.	:	6570.3 MFO 3	IRONBRIDGE	FDS INC SMI	D CAP F		02/18/2005 34,954.	09/25/2013
1,778.		114.37 MFO :	IRONBRIDGE	FDS INC SMI	D CAP F		12/18/2008 924.	11/07/2013
4,759.		306.05 MFO 2,920.	IRONBRIDGE	FDS INC SMI	D CAP F		12/17/2009 1,839.	11/07/2013
					i			
					:			
					i			

JSA 3E1730 1.000

THE SAMBARD KINGDOM BRUNEL SOCIETY N.A.

FORM 990-PF - PART IV CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME.

	INS AND LC	AND LOSSES FOR TAX ON INVESTI						
Kind of Pross sale	roperty Depreciation	Description or D Cost or FMV Adj. basis Excess of					Date acquired Gain	Date 30id
price less expenses of sale	allowed/ allowable	other basis	as of 12/31/69	as of 12/31/69	FMV over		or (loss)	
7,141.	anonadic	459.2 MFO I					12/18/2008	11/07/2013
9,051.		582.07 MFO 4,348.	IRONBRIDGE	FDS INC SMI	D CAP F		12/18/2008 4,703.	11/07/2013
518,422.		33339.06 MF	O IRONBRIDG	E FDS INC S	SMID CAP		02/18/2005 188,365.	11/07/2013
27,798.		1470 MFO DF. 17,684.	A INTL SMAL	L CO PORTFO	LIO FD		06/03/2009 10,114.	12/26/2013
197,422.		AURORA LIMI	TED PARTNER	SHIP			01/01/2011 197,422.	12/31/2013
109,186.		AURORA LIMI	TED PARTNER	SHIP			06/30/2013 109,186.	12/31/2013
702.		AURORA LIMI	TED PARTNER	SHIP 1256 G	SIAN		06/30/2013 702.	12/31/2013
1,053.		AURORA LIMI	AURORA LIMITED PARTNERSHIP 1256 GAIN				01/01/2012 1,053.	12/31/2013
10,033.		LTCG DIVIDE	LTCG DIVIDENDS - INTL SMALL CO PORTFOLIO				VAR 10,033.	VAR
322.		LTCG DIVIDE	LTCG DIVIDENDS - UNCONSTRAINED BD				VAR 322.	VAR
48,808.		LTCG DIVIDE	NDS - ADVAN	TGE FDS INC	DREYFU	! ,	VAR 48,808.	VAR
1,992.		LTCG DIVIDE	LTCG DIVIDENDS - WHG INCOME OPPORTUNITY				VAR 1,992.	VAR
JSA =1730 1.000 46X1CK 4	316	1	V 13-7	.1F	2100-14	. 1		PAGE 17

26-4312827

FORM 990-PF - PART IV CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

į.	APITAL GAI	INS AND LC			IIAAEQII	VICINI IINCO Pl or Date	Date sold
ļ	Property	[D]			D acquired	Date Suid	
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis	Gain or (loss)	
315.		LTCG DIVIDE	NDS - WELLS	FARGO ADVA	NTAGE A	V:	AR VAR
2,155.		LTCG DIVIDE	NDS - DELAW	ARE EMERGIN	G MARKE	2,15	AR VAR
2,383,136.		2383136 AUR 2,422,927.	ORA LIMITED	PARTNERSHI	P	05/01/200 -39,793	
11,649.		LITIGATION	PROCEEDS-CA	SH		11,649	
TOTAL GAIN(I	oss)			· • • • • • • • • • • • • • • • • • • •	• • • • • • • • • • • • • • • • • • • •	946,910	<u>5.</u>

- INTEREST ON TEMPORARY CASH INVESTMENTS PART I FORM 990PF,

NET INVESTMENT INCOME	.77.	2.	.76
REVENUE AND EXPENSES PER BOOKS	.77.	2.	97.
			TOTAL
DESCRIPTION	INTEREST - CASH ACCOUNT	NORTHERN TRUST-LINE ITEMS NORTHERN TRUST-CASH	

ATTACHMENT 1 PAGE 19

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

NET INVESTMENT INCOME	1,467. 40,037. 36,943.	,45	പെ	94 84	5,999. 6,759.		20,877.	5,587.	212,882.
REVENUE AND EXPENSES PER BOOKS	6,0	47,454. 11,369.	7,192. 14,817.	947.	5,999. 6,759.	en en	20,877.	. 5, 587.	212,950.
DESCRIPTION	$HH\Sigma$	RES TR MSCI EAFE SMALL CO PORTFOL	DREYFUS TAGE AB	HUSSMAN STRATEGIC TOTAL RETURN UNCONSTRAINED BD-INS	DELAWARE POOLED TR EMERGING MKTS PORT US GOV DIVIDENDS-LINE	US GOV DIVIDENDS-CASH AURORA LIMITED PARTNERSHIP #36-3539541	INTEREST DIVIDENDS	TAX EXEMPT INTEREST SEC 988 INTEREST	TOTAL

ATTACHMENT 2 PAGE 20

2100-14

ATTACHMENT 3 PAGE 21

FORM 990PF, PART I - OTHER INCOME

	ESCRIPTION	PER BOOKS
	AURORA LIMITED PARTNERSHIP - ORDINARY IN	
'	AURORA - OTHER INCOME	10
•	AURORA - SEC 475(F)	6-
•	AURORA - SEC 1231 GAIN	
•	MISCELLANEOUS INCOME	

TOTALS

	NET	INVESTMENT	INCOME		10,679.	-3,765.	202.	62.	
EVENOR	AND	PENSES	R BOOKS	651.	10,679.	-	202.	62.	

FEES
ACCOUNTING
1
H
PART
990PF,
- 11

CHARITABLE	•	
ADJUSTED NET INCOME		
NET INVESTMENT INCOME	4,025.	4,025.
REVENUE AND EXPENSES PER BOOKS	4,025.	4,025.
		TOTALS
DESCRIPTION	ACCOUNTING FEES	

PART I - OTHER PROFESSIONAL FEES FORM 990PF,

	NET	INVESTMENT	INCOME	6,433.		17,436.	23,869.
REVENUE	AND	EXPENSES	PER BOOKS	6,433.		17,436.	23,869.
			DESCRIPTION	ASSET MANAGEMENT FEES	AUKUKA LIMITED FAKTNEKSHIF #36-3539541	MANAGEMENT FEES	TOTALS

2100-14

FORM 990PF, PART I - INTEREST EXPENSE

REVENUE AND

EXPENSES PER BOOKS

NET INVESTMENT INCOME

DESCRIPTION

AURORA LIMITED PARTNERSHIP # 36-3539541 INTEREST

15,678.

15,678.

15,678.

15,678.

TOTALS

ATTACHMENT 6 PAGE 24

FORM 990PF, PART I - TAXES

NET INVESTMENT INCOME	10.	4,728.	818.	5,706.
REVENUE AND EXPENSES PER BOOKS	10.	4,728. 39,136.	818.	44,842.
DESCRIPTION	FRANCHISE TAX BOARD TAXES-OTHER	FOREIGN TAKES FAID: NORTHERN TRUST - LINE FEDERAL TAXES AURORA LIMITED PARTNERSHIP	#36-3539541 FOREIGN TAXES	TOTALS

2100-14

EXPENSES	
- OTHER	
PART I	
990PF,	

NET INVESTMENT INCOME		8,182.	21,516.	29, 698.
REVENUE AND EXPENSES PER BOOKS	1,913. 1,991. 75. 100.	8,182.	42. 21,516.	33,725.
DESCRIPTION	INSURANCE COMPUTER EXPENES SUBSCRIPTIONS MISCELLANEOUS PORTFOLIO DEDUCTIONS:	AURORA LIMITED PARTNERSHIP #36-3539541 AURORA LIMITED PARTNERSHIP #36-3539541	NONDEDUCTIBLE EXPENSE OTHER DEDUCTIONS	TOTALS

CHARITABLE
PURPOSES
1,819.
1,991.
75.

3,985.

ATTACHMENT 8 PAGE 26

2100-14

STOCK
CORPORATE
_ []
II
PART
990PF,
FORM

ENDING <u>FMV</u>	559,735. 1,718,949. 368,550. 1,906,196.	1,001,710.	6,130,498.
ENDING BOOK VALUE	523,514. 1,266,701. 230,762. 1,367,375. 597,152.	987,234.	4,972,845.
DESCRIPTION	N TRUST-DELAWARE POOLED EMG MK N TRUST-FRONTEGRA IRONBRIDGE N TRUST-MSCI EAFE INDEX FD N TRUST-DFA INTL SM CO FD N TRUST-ABERDEEN EMG MKTS FD MOVE INC COM STK N TRUST-VANGUARD INSTL INDEX N TRUST-ADVANTGE DREYFUS OPPOR	N TRUST-WHG INCOME OPPORTUNITY	TOTALS

HMENT 1
MEN
MEN
MEN
MEN
MEN
別
#
#
#
\ddot{c}
~
EH
₽
R.

- CORPORATE BONDS PART II FORM 990PF,

DESCRIPTION

TRUST-PIMCO UNCONSTRAINED BD TRUST-HUSSMAN INVT TR STRATE TRUST-PIMCO ALL AST FD TRUST-WELLS FARGO ADVANTAGE z z z z

BOOK VALUE ENDING

ENDING

404,958. 827,602. 991,972. 391,137. 401,073. 725,292. 998,071. 441,064.

2,615,669.

2,565,500.

TOTALS

ATTACHMENT 10 PAGE 28

FORM 990PF, PART II - OTHER INVESTMENTS

2100-14

ATTACHMENT 11

DESCRIPTION

ENDING BOOK VALUE

ENDING FMV

AURORA LIMITED PARTNERSHIP

TOTALS

ATTACHMENT 11 PAGE 29

- OTHER ASSETS PART II FORM 990PF,

DESCRIPTION

BROKERS UNSETTLED SECURITY SALES AND OTHER RECEIVABLES

BOOK VALUE ENDING

ENDING FMV

120,005.

120,005.

120,005.

120,005.

TOTALS

2100-14

ATTACHMENT 12 PAGE 30

THE SAMBARD KINGDOM BRUNEL SOCIETY N.

N.A. 26-4312827

ATTACHMENT 13

FORM 990PF, PART II - OTHER LIABILITIES

DESCRIPTION

ENDING BOOK VALUE

PENDING PURCHASES

827.

TOTALS

827.

46X1CK 4316

DIRECTORS, AND TRUSTEES PART VIII - LIST OF OFFICERS, FORM 990PF,

NAME AND ADDRESS

TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION

225 ARIZONA AVENUE, SUITE 350 SANTA MONICA, CA 90401 PETER NORTON

TRUSTEE

2100-14 V 13-7.1F

ATTACHMENT 14 PAGE 32

ATTACHMENT 14

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

PETER NORTON SANTA MONICA, CA 90401 310-576-7700

46X1CK 4316 V 13-7.1F 2100-14 . PAGE 33

FORM 990-PF, PART XVI-A - ANALYSIS OF OTHER REVENUE

RELATED OR EXEMPT FUNCTION INCOME	
AMOUNT	651. 10,679. -3,765. 202. 62.
EXCLUSION	18 18 18 18
AMOUNT	
BUSINESS	525990 525990 525990 525990 525990
<u>z</u> .	AURORA-ORDINARY INCOME AURORA-OTHER INCOME AURAORA-475(F)INCOME AURORA-SEC 1231 GAIN MISCELLANEOUS INCOME
DESCRIPTION	AURORA-ORDINARY INCOME AURORA-OTHER INCOME AURAORA-475(F) INCOMI AURORA-SEC 1231 GAII MISCELLANEOUS INCOMI

7,829.

ATTACHMENT 16 PAGE 34

SCHEDULE D (Form 1041)

Department of the Treasury Internal Revenue Service

Capital Gains and Losses

► Attach to Form 1041, Form 5227, or Form 990-T.

▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9 and 10. ▶ Information about Schedule D and its separate instructions is at www.irs.gov/form1041.

2013

OMB No. 1545-0092

Name of estate or trust Employer identification number THE ISAMBARD KINGDOM BRUNEL SOCIETY OF N.A. 26-4312827 Note: Form 5227 filers need to complete only Parts I and II. Short-Term Capital Gains and Losses - Assets Held One Year or Less See instructions for how to figure the amounts to enter on (h) Gain or (loss) Subtract column (e) Adjustments the lines below. to gain or loss from from column (d) and Proceeds Cost Form(s) 8949, Part I, combine the result with This form may be easier to complete if you round off cents (or other basis) (sales pnce) line 2, column (g) column (g) to whole dollars. 1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b Totals for all transactions reported on Form(s) 8949 376,759. 384,812 8,053. Totals for all transactions reported on Form(s) 8949 Totals for all transactions reported on Form(s) 8949 109,888. 109,888. 5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts 5 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2012 Capital Loss 6 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). Enter here and on 117,941. Long-Term Capital Gains and Losses - Assets Held More Than One Year See instructions for how to figure the amounts to enter on (h) Gain or (loss) Adjustments to gain or loss from Subtract column (e) from column (d) and the lines below. Proceeds Cost Form(s) 8949, Part II, combine the result with This form may be easier to complete if you round off cents (or other basis) (sales price) line 2, column (g) column (g) to whole dollars. 8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b 8b Totals for all transactions reported on Form(s) 8949 514,046. 411,977. 102,069. Totals for all transactions reported on Form(s) 8949 1,279,345. 786,397. 492,948. Totals for all transactions reported on Form(s) 8949 2,656,885. 2,422,927. 233,958. Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 11 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts. 12 12 13 13 14 14 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2012 Capital Loss 15 15 Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h). Enter here and on 828,975.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2013

Sche	dule D (Form 1041) 2013			_	Page 2
Pai	t III Summary of Parts I and II		(1) Beneficiaries'	(2) Estate's	(2) Total
	Caution: Read the instructions before completing this pa	art	(see instr.)	or trust's	(3) Total
17	Net short-term gain or (loss)	17			117,941.
18	Net long-term gain or (loss):				
а	Total for year	18a			828,975.
	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	18b			
	28% rate gain	18c			
	Total net gain or (loss). Combine lines 17 and 18a ▶	19			946,916.
gains	: If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 , go to Part V, and do not complete Part IV. If line 19, column (3), is a n ssary.	(or Fo	rm 990-T, Part I, line 4 s, complete Part IV and	a). If lines 18a and 1 I the Ca <mark>pital Loss</mark> Ca	9, column (2), are net uryover Worksheet, as
Pai					
20	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, P	Part I li	ne 4c if a trust) the sm	aller of	
•	The loss on line 19 column (3) or h \$3 000		• •	20 /)
Note	If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, Carryover Worksheet in the instructions to figure your capital loss carryover.	page	1, line 22 (or Form 990	-T, line 34), is a loss	, complete the Capital
Par				-	-
	1 1041 filers. Complete this part only if both lines 18a and 19 in colu		2) are gains or an ar	mount is entered in	Part Lor Part II and
	e is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more			mount is entered in	Tare to tare it and
	ion: Skip this part and complete the Schedule D Tax Worksheet in the i				
• Ei	ther line 18b, col. (2) or line 18c, col. (2) is more than zero, or				
	oth Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.				
	n 990-T trusts. Complete this part only if both lines 18a and 19 a				
	orm 990-T, and Form 990-T, line 34, is more than zero. Skip this part	and c	omplete the Schedul	e D Tax Workshee	et in the instructions
	her line 18b, col. (2) or line 18c, col. (2) is more than zero.				
21	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 3	4)	. 21		
22	Enter the smaller of line 18a or 19 in column (2)				
	but not less than zero				
23	Enter the estate's or trust's qualified dividends				
	from Form 1041, line 2b(2) (or enter the qualified				
	dividends included in income in Part I of Form 990-T) 23		 		
24	Add lines 22 and 23				
25	If the estate or trust is filing Form 4952, enter the				
	amount from line 4g; otherwise, enter -0 ▶ 25		⊣		
26	Subtract line 25 from line 24. If zero or less, enter -0-		. 26		
27	Subtract line 26 from line 21. If zero or less, enter -0-				
28	Enter the smaller of the amount on line 21 or \$2,450		·		
29	Enter the smaller of the amount on line 27 or line 28				
30	Subtract line 29 from line 28. If zero or less, enter -0 This amount is			▶ 30	
31	Enter the smaller of line 21 or line 26				
32	Subtract line 30 from line 26		. 32		
33	Enter the smaller of line 21 or \$11,950				
34	Add lines 27 and 30				
35	Subtract line 34 from line 33. If zero or less, enter -0		· -		
36	Enter the smaller of line 32 or line 35				
37	Multiply line 36 by 15%			▶ 37	
38	Enter the amount from line 31				
39	Add lines 30 and 36				
40	Subtract line 39 from line 38. If zero or less, enter -0-				
41	Multiply line 40 by 20%			▶ 41	
42	Figure the tax on the amount on line 27. Use the 2013 Tax Rate Schedule for B	Estates	:		

Schedule D (Form 1041) 2013

43

and Trusts (see the Schedule G instructions in the instructions for Form 1041)

Figure the tax on the amount on line 21. Use the 2013 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)....

Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule

42

43

d Other Dispositions of Capital Assets

►Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.

OMB No 1545-0074

Department of the Treasury Internal Revenue Service Name(s) shown on return

▶ File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Altachment

THE ISAMBARD KINGDOM BRUNEL SOCIETY OF N.A.

Social security number or taxpayer identification number 26-4312827

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box A, B, or C below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Short-Term. Transactions involving capital assets you held one year or less are short-term. For long-term transactions, see page 2.

Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 1a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

(A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)

(B) Short-term transactions reported on Form(s) 1099-B showing basis was not reported to the IRS

(C) Short-term transactions not reported to you on Form 1099-B

Description of property (Example: 100 sh. XYZ Co.) Date acquired (Mo., day, yr.) Date sold of disposed (Mo., day, yr.) Sales price (sales price) (sa
EMERGING MKTS FD I 12/20/2012 04/23/2013 5,604. 5,594. 10 15.14 MFO VANGUARD INSTL INDEX FD SH 12/26/2012 07/22/2013 2,353. 1,967. 386 63.91 MFO VANGUARD INSTL INDEX FD SH 03/27/2013 07/22/2013 9,932. 9,146. 786 72.41 MFO VANGUARD INSTL INDEX FD SH 06/27/2013 07/22/2013 11,253. 10,695. 558 80.29 MFO VANGUARD INSTL INDEX FD SH 10/04/2012 07/22/2013 12,478. 10,454. 2,024 10869.57 MFO WHG INCO OPPORTUNITY-INST 11/01/2013 12/26/2013 150,000. 148,261. 1,739
15.14 MFO VANGUARD INSTL INDEX FD SH 12/26/2012 07/22/2013 2,353. 1,967. 386 63.91 MFO VANGUARD INSTL INDEX FD SH 03/27/2013 07/22/2013 9,932. 9,146. 786 72.41 MFO VANGUARD INSTL INDEX FD SH 06/27/2013 07/22/2013 11,253. 10,695. 558 80.29 MFO VANGUARD INSTL INDEX FD SH 10/04/2012 07/22/2013 12,478. 10,454. 2,024 10869.57 MFO WHG INCO OPPORTUNITY-INST 11/01/2013 12/26/2013 150,000. 148,261. 1,739
INSTL INDEX FD SH 12/26/2012 07/22/2013 2,353. 1,967. 386 63.91 MFO VANGUARD INSTL INDEX FD SH 03/27/2013 07/22/2013 9,932. 9,146. 786 72.41 MFO VANGUARD INSTL INDEX FD SH 06/27/2013 07/22/2013 11,253. 10,695. 558 80.29 MFO VANGUARD INSTL INDEX FD SH 10/04/2012 07/22/2013 12,478. 10,454. 2,024 10869.57 MFO WHG INCO OPPORTUNITY-INST 11/01/2013 12/26/2013 150,000. 148,261. 1,739
63.91 MFO VANGUARD INSTL INDEX FD SH 03/27/2013 07/22/2013 9,932. 9,146. 786 72.41 MFO VANGUARD INSTL INDEX FD SH 06/27/2013 07/22/2013 11,253. 10,695. 558 80.29 MFO VANGUARD INSTL INDEX FD SH 10/04/2012 07/22/2013 12,478. 10,454. 2,024 10869.57 MFO WHG INCO OPPORTUNITY-INST 11/01/2013 12/26/2013 150,000. 148,261. 1,739
INSTL INDEX FD SH 03/27/2013 07/22/2013 9,932. 9,146. 786 72.41 MFO VANGUARD INSTL INDEX FD SH 06/27/2013 07/22/2013 11,253. 10,695. 558 80.29 MFO VANGUARD INSTL INDEX FD SH 10/04/2012 07/22/2013 12,478. 10,454. 2,024 10869.57 MFO WHG INCO OPPORTUNITY-INST 11/01/2013 12/26/2013 150,000. 148,261. 1,739
72.41 MFO VANGUARD INSTL INDEX FD SH 06/27/2013 07/22/2013 11,253. 10,695. 558 80.29 MFO VANGUARD INSTL INDEX FD SH 10/04/2012 07/22/2013 12,478. 10,454. 2,024 10869.57 MFO WHG INCO OPPORTUNITY-INST 11/01/2013 12/26/2013 150,000. 148,261. 1,739 2.47 MFO DFA INTL SMA
INSTL INDEX FD SH 06/27/2013 07/22/2013 11,253. 10,695. 558 80.29 MFO VANGUARD INSTL INDEX FD SH 10/04/2012 07/22/2013 12,478. 10,454. 2,024 10869.57 MFO WHG INCO OPPORTUNITY-INST 11/01/2013 12/26/2013 150,000. 148,261. 1,739 2.47 MFO DFA INTL SMA
80.29 MFO VANGUARD INSTL INDEX FD SH 10/04/2012 07/22/2013 12,478. 10,454. 2,024 10869.57 MFO WHG INCO OPPORTUNITY-INST 11/01/2013 12/26/2013 150,000. 148,261. 1,739
INSTL INDEX FD SH 10/04/2012 07/22/2013 12,478. 10,454. 2,024 10869.57 MFO WHG INCO OPPORTUNITY-INST 11/01/2013 12/26/2013 150,000. 148,261. 1,739 2.47 MFO DFA INTL SMA
10869.57 MFO WHG INCO OPPORTUNITY-INST 11/01/2013 12/26/2013 150,000. 148,261. 1,739 2.47 MFO DFA INTL SMA
OPPORTUNITY-INST 11/01/2013 12/26/2013 150,000. 148,261. 1,739 2.47 MFO DFA INTL SMA 10/2013 150,000. 148,261. 1,739
2.47 MFO DFA INTL SMA
CO PORTFOLIO FD 03/08/2013 12/26/2013 47. 41.
9.13 MFO DFA INTL SMA
CO PORTFOLIO FD 09/10/2013 12/26/2013 173. 167.
71.91 MFO DFA INTL
SMALL CO PORTFOLIO 12/12/2013 12/26/2013 1,360. 1,320. 40
265.95 MFO DFA INTL
SMALL CO PORTFOLIO 12/12/2013 12/26/2013 5,029. 4,880. 149
277.9 MFO DFA INTL
SMALL CO PORTFOLIO 06/10/2013 12/26/2013 5,255. 4,669. 586
546.74 MFO DFA INTL
SMALL CO PORTFOLIO 12/12/2013 12/26/2013 10,339. 10,033. 306
60.53 MFO VANGUARD
INSTL INDEX FD SH 09/26/2013 12/26/2013 10,208. 9,416. 792
63.93 MFO VANGUARD
INSTL INDEX FD SH 12/26/2013 12/26/2013 10,781. 10,781.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if
Box B above is checked), or line 3 (if Box C above is checked) ▶ 384,812. 376,759. 8,053 Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter a

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (q) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

d Other Dispositions of Capit

► Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.

OMB No. 1545-0074

Department of the Treasury Internal Revenue Service Name(s) shown on return

► File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Altachment Sequence No

THE ISAMBARD KINGDOM BRUNEL SOCIETY OF N.A.

Social security number or taxpayer identification number 26-4312827

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box A, B, or C below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Part I

Short-Term. Transactions involving capital assets you held one year or less are short-term. For long-term transactions, see page 2.

Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 1a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

(B) Shor	rt-term tra	ansactions rep		s) 1099-B show	wing basis was repo ving basis was not l LR	•		2)	
1	(a) ription of pile: 100 sh. 2		(b) Date acquired	(c) Date sold or	(d) Proceeds	(e) Cost or olher basis. See the	If you enter an a	any, to gain or loss. emount in column (g), de in column (f). trate instructions.	(h) Gain or (loss). Subtract column (e)
			(Mo., day, yr.)	disposed (Mo., day, yr.)	(sales price) (see instructions)	Note below and see Column (e) in the separate instructions	(f) Code(s) from instructions	(g) Amount of adjustment	from column (d) and combine the result with column (g)
13297.87 FARGO		WELLS FR ADVAN	11/01/2013	12/26/2013	150,000.	149,335.			665
	-								
		-							,
						<u> </u>			
	·· . ·					-,			
 -									
act negativ	ve amoun dule D, lin	ts). Enter each e 1b (if Box A	ns (d), (e), (g), a n total here an above is check (if Box C above	d include on ed), line 2 (if					

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

d Other Dispositions of Capi

►Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.

OMB No. 1545-0074

Department of the Treasury Internal Revenue Service Name(s) shown on return ► File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Attachment Sequence No

THE ISAMBARD KINGDOM BRUNEL SOCIETY OF N.A.

Social security number or taxpayer identification number 26-4312827

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box A, B, or C below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Short-Term. Transactions involving capital assets you held one year or less are short-term. For long-term transactions, see page 2.

Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was

reported to the IRS a Schedule D, line 1a;	and for whic	h no adjustr t required to	ments or codes report these tr	are required ansactions or	Enter the to	otal directly on (see instruction	ons).
You <i>must</i> check Box A, B, or C be							<u> </u>
complete a separate Form 8949,	page 1, for e	ach applicab	le box. If you ha	ve more short-	term transact	ions than will fit o	n this page
for one or more of the boxes, com							
(A) Short-term transactions repe)	
(B) Short-term transactions repo				eported to the IF	เร		
X (C) Short-term transactions not	reported to you	on Form 1099)-B				
1 (a) Description of property	(b) Date acquired	(c) Date sold or	(d) Proceeds	(e) Cost or other basis. See the	If you enter an a enter a cod	iny, to gain or loss. mount in column (g). le in column (f). rate instructions.	(h) Gain or (loss). Subtract column (e)
(Example: 100 sh. XYZ Co.)	(Mo., day, yr.)	disposed (Mo., day, yr.)	(sales price) (see instructions)	Note below and see Column (e) in the separate instructions	(f) Code(s) from instructions	(g) Amount of adjustment	from column (d) and combine the result with column (g)
AURORA LIMITED	06 /30 /3013	12/21/2012	100 105				
PARTNERSHIP	06/30/2013	12/31/2013	109,186.			·	109,186
AURORA LIMITED	06/30/2013	12 /21 /2012	500]		
PARTNERSHIP 1256 GI	06/30/2013	12/31/2013	702.				702
							,,,,
							
				·			
2 Totals. Add the amounts in column act negative amounts). Enter each your Schedule D, line 1b (if Box A a Box B above is checked), or line 3 (total here and above is check	d include on ed), line 2 (if	109,888.				109,888.

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

Name(s) shown on return. (Name and SSN or taxpayer identification no not required if shown on other side.)

THE ISAMBARD KINGDOM BRUNEL SOCIETY OF N.A.

Social security number or taxpayer identification number 26-4312827

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box D, E, or F below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Part II Long-Term. Transactions involving capital assets you held more than one year are long term. For short-term transactions, see page 1.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- X (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above) (E) Long-term transactions reported on Form(s) 1099-B showing basis was not reported to the IRS
- (F) Long-term transactions not reported to you on Form 1099-B

1 Description of property (5)	(b) Date acquired	(c) Date sold or disposed	(d) Proceeds (sales price)	(e) Cost or other basis. See the Note below and	If you enter an a	any, to gain or loss. amount in column (g), de in column (f) arate instructions.	Gain or (loss). Subtract column (e) from column (d) and
(Example: 100 sh. XYZ Co.)	(Mo., day, yr.)	(Mo., day, yr.)	(see instructions)	see Column (e) in the separate instructions	(f) Code(s) from instructions	(g) Amount of adjustment	combine the résult with column (g)
2555 MFC ISHARES TR MSCI EAFE INDEX FD	02/02/2012	03/25/2013	150,052.	135,864.			14,188
96.41 MFO VANGUARD INSTL INDEX FD SH B	02/02/2012	07/22/2013	14,983.	11,707.			3,276
1412.43 MFO VANGUARD INSTL INDEX FD SH B	02/02/2012	09/25/2013	220,000.	171,511.			48,489
765.01 MFO VANGUARD INSTL INDEX FD SH B	02/02/2012	12/26/2013	129,011.	92,895			36,116
						-	
2 Totals. Add the amounts in colu	ımns (d), (e),	(g), and (h)					
(subtract negative amounts). En include on your Schedule D, linc checked), line 9 (if Box E above (if Box F above is checked) ▶	e 8b (if Box D	above is	514,046	411,977.			102,069.

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

Name(s) shown on return. (Name and SSN or taxpayer identification no. not required if shown on other side)

THE ISAMBARD KINGDOM BRUNEL SOCIETY OF N.A.

Social security number or taxpayer identification number 26-4312827

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box D, E, or F below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Part II Long-Term. Transactions involving capital assets you held more than one year are long term. For short-term transactions, see page 1.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
- X (E) Long-term transactions reported on Form(s) 1099-B showing basis was not reported to the IRS
- (F) Long-term transactions not reported to you on Form 1099-B

<u> </u>							
(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see Column (e) in the separate	If you enter an enter a co	any, to gain or loss. amount in column (g), de in column (f) arate instructions. (g) Amount of	(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
				instructions	instructions	adjustment	
7204.61 MFO IRONBRIDGE						_	
FDS INC SMID CAP FD	02/18/2005	03/22/2013	100,000.	71,326.			28,674.
32303.57 MFO ABERDEEN							
FDS EMERGING MKTS FD	06/03/2009	04/23/2013	510,396.	290,732.			219,664.
6570.3 MFO IRONBRIDGE		 					
FDS INC SMID CAP FD	02/18/2005	09/25/2013	100,000.	65,046.			34,954.
114.37 MFO IRONBRIDGE							
FDS INC SMID CAP FD	12/18/2008	11/07/2013	1,778.	854.			924.
306.05 MFO IRONBRIDGE	12/17/2009	11/07/2013	4 750	0.000			1 000
FDS INC SMID CAP FD	12/17/2009	11/0//2013	4,759.	2,920.			1,839.
459.2 MFO IRONBRIDGE FDS INC SMID CAP FD	12/18/2008	11/07/2013	7,141.	2 420			2 711
582.07 MFO IRONBRIDGE	12,10,200	,,	7,141.	3,430.	 		3,711.
FDS INC SMID CAP FD	12/18/2008	11/07/2013	9,051.	4,348.			4,703.
33339.06 MFO IRONBRIDGE			3,031.	4,540.			4,703.
FDS INC SMID CAP FD	02/18/2005	11/07/2013	518,422.	330,057.			188,365.
1470 MFO DFA INTL SMALL			010/122.	330,037.			100/303.
CO PORTFOLIO FD	06/03/2009	12/26/2013	27,798.	17,684.			10,114.
2 Totals. Add the amounts in colu (subtract negative amounts). El include on your Schedule D, line checked), line 9 (if Box E above (if Box F above is checked) ▶	nter each tota e 8b (if Box D	I here and D above is	1,279,345.	786,397.			492,948.

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

Name(s) shown on return. (Name and SSN or taxpayer identification no not required if shown on other side.) THE ISAMBARD KINGDOM BRUNEL SOCIETY OF N.A.

Social security number or taxpayer identification number 26-4312827

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box D, E, or F below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later

| Part II |

Long-Term. Transactions involving capital assets you held more than one year are long term. For short-term transactions, see page 1.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
- (E) Long-term transactions reported on Form(s) 1099-B showing basis was not reported to the IRS
- X (F) Long-term transactions not reported to you on Form 1099-B

The state of the s	iot roportou t	o you on ton	111 1000 D				
1 (a) Description of property (Example: 100 sh XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see Column (e) in the separate instructions	If you enter an enter a co	any, to gain or loss. amount in column (g), de in column (f). trate instructions. (g) Amount of adjustment	(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
AURORA LIMITED							<u></u>
PARTNERSHIP	01/01/2011	12/31/2013	197,422.				197,422
AURORA LIMITED							
PARTNERSHIP 1256 GA	01/01/2012	12/31/2013	1,053.				1,053
LTCG DIVIDENDS - INTL							
SMALL CO PORTFOLIO			10,033.				10,033
LTCG DIVIDENDS -			··	-			
UNCONSTRAINED BD			322.		1		322
LTCG DIVIDENDS -							
ADVANTGE FDS INC DR	}		48,808.		1		48,808
LTCG DIVIDENDS - WHG							
INCOME OPPORTUNITY			1,992.				1,992
LTCG DIVIDENDS - WELLS							
FARGO ADVANTAGE ABS			315.				315
LTCG DIVIDENDS -							
DELAWARE EMERGING M			2,155.				2,155
2383136 AURORA LIMITED	!		1				
PARTNERSHIP	05/01/2000	09/30/2013	2,383,136.	2,422,927.			-39,791
LITIGATION PROCEEDS-CA				-			-
Н			11,649.				11,649
							
	<u> </u>						
2 Totals. Add the amounts in colu (subtract negative amounts). Expending the checked on your Schedule D, line checked), line 9 (if Box E above (if Box F above is checked) ▶	nter each tota e 8b (if Box D	I here and above is	2,656,885.	2422927.			233,958.

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

Isambard Kingdom Brunel Society of North America Form 990-PF

TIN: 26-4312827

2013

Grants

Grant Recipient Name & Address	<u>Fdn</u> Status	Purpose	Amount	Date	Doc's	Notes
Califomia Institute of Technology 1200 East Califomia Boulevard Pasadena, CA 91125	501(c)3	HSS Committee Trustee Annual Fund	\$15,000 00 \$25,000.00	01/22/13 01/22/13		2
Jazz at Lincoln Center 33 West 60th Street New York, NY 10023-7999	501(c)3	2012-2013 Annual Board Contribution	\$25,000 00	05/09/13		1
Lincoln Center for the Arts 70 Lincoln Center Plaza New York, NY 10023-6583	501(c)3	2013 Public Art Projects Support	\$50,000,00	06/06/13		1
Los Angeles County Museum of Art 5905 Wilshire Bivd Los Angeles, CA 90038	501(c)3	2012-2013 Annual Board Contribution Transformation LACMA Campaign / Unrestricted	\$100,000.00 \$200,000 00	03/12/13 12/19/13		2
Museum of Modern Art 11 West 53rd Street New York, NY 10019-5498	501(c)3	PS1 Annual Board Contribution Library Committee Conservation Committee Annual Exhibition Fund	\$100,000.00 \$3,000 00 \$20,000.00 \$100,000 00	02/07/13 02/07/13 06/06/13 12/19/13		4
National Arts Club 15 Gramercy Park South New York, NY 10003	501(c)3	General Support of the Club's Efforts & Projects	\$25,000.00	02/07/13		1
National Center for Family Philanthropy 1101 Connecticutt Avenue, NW, Ste 220 Washington, DC 20036	501(c)3	Friend of the Family 2013	\$400.00	01/10/13		1
New York Presbyterian Hospital 654 West 170th Street New York, NY 10032	501(c)3	Unrestricted 21st Century Fund	\$25,000 00 \$10,000.00	05/09/13 05/09/13		2
New York Public Radio PO Box 1550 New York, NY 10116-1550	501(c)3	Benefactors Circle Contribution	\$2,500 00	11/14/13		1
Orange County Family Foundation Aliance 4041 MacArthur Blvd. Suite 510 Newport Beach, CA 92660	501(c)3	Annual Membership Contribution	\$150 00	02/12/13		1
Park Avenue Armory 643 Park Avenue New York, NY 10065	501(c)3	Annual Board Contribution	\$35,000 00	12/19/13		1
Printed Matter, Inc 195 Tenth Avenue New York, NY 10011	501(c)3	New York Art Book Fair Conference	\$3,500.00	07/25/13		1
RAND Corporation 1776 Main Street / PO Box 2138 Santa Monica, CA 90407-2138	501(c)3	2013 Support / Unrestricted	\$30,000 00	04/16/13		1
Reed College 3203 Southeast Woodstock Blvd Portland, OR 972020-8199	501(c)3	2012-2013 Annual Dues	\$25,000 00	05/09/13		1
Signature Theatre Company 630 Ninth Avenue, Suite 1106 New York, NY 10036	501(c)3	2012-2013 Board Annual Grving	\$25,000 00	04/16/13		1
Spelman College 350 Spelman Lane SW, Box 1551 Atlanta, GA 30314-4399	501(c)3	Annual Board Contribution	\$50,000 00	12/19/13		1
Symphony Space 2537 Broadway New York, NY 10025	501(c)3	Producers Circle Capital Campaign Study	\$5,000 00 \$38,000.00	06/06/13 07/02/13		2
Whitney Museum of American Art 945 Madison Avenue New York, NY 10021	501(c)3	FY13 Trustee Annual Fund	\$75,000.00	04/16/13		1
Wikimedia Foundation 149 New Montgomery Street - 3rd Floor San Francisco, CA 94105	501(c)3	Unrestricted	\$5,000 00	01/22/13		1
World Monuments Fund 350 Fifth Avenue, Surte 2412 New York, NY 10118	501(c)3	President's Circle	\$10,000 00	6/6/2013		1

TOTAL GRANTS

\$1,000,550.00

20 Grantees 27 Total Grants in the amount of \$1,000,550

50m 8868

(Rev. January 2014)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

► File a separate application for each return.
► Information about Form 8868 and its instructions is at www.irs.gov/form8868.

OMB No. 1545-1709

				• • • • • • • • • • • • • • • • • • • •		
If you are	filing for an Automatic 3-Month Extension, of filing for an Additional (Not Automatic) 3-Me	complete c	only Part I and check the	nis box	<u> </u>	
	olete Part II unless you have already been gra				8.	
a corporation 8868 to req Return for instructions)	ling (e-file). You can electronically file Form in required to file Form 990-T), or an addition quest an extension of time to file any of the Transfers Associated With Certain Persona For more details on the electronic filing of the	nal (not aut forms liste Il Benefit (nis form, vis	tomatic) 3-month exter ed in Part I or Part II w Contracts, which mus sit www.irs.gov/efile an	nsion of time. You can electronical with the exception of Form 8870, It be sent to the IRS in paper f and click on <i>e-file for Charities & Non</i>	ly file Form Information format (see	
	tomatic 3-Month Extension of Time. Or					
	n required to file Form 990-T and requesting				 -	
Part I only				<u>.</u>	▶ 🔲	
	porations (including 1120-C filers), partnersh	ips, REMIC	Ss, and trusts must use i	•		
to file incom	e tax returns. Name of exempt organization or other filer, see in	etructions		Enter filer's identifying number, se		
Type or	Name of exempt organization of other liter, see in	structions.		Employer identification number (EIN) or		
print	THE ISAMBARD KINGDOM BRUNEL SOCIETY OF N.A.			26-4312827		
File by the	Number, street, and room or suite no. If a P.O. box			Social security number (SSN)		
due date for filing your	225 ARIZONA AVENUE, SUITE 350			Cocial Security Humber (CON)		
retum. See	City, town or post office, state, and ZIP code. For		dress, see instructions.			
instructions.	SANTA MONICA, CA 90401	•				
Enter the Re	eturn code for the return that this application	is for (file a	separate application for	or each return)	0 4	
Application		Return	Application		Return	
is For		Code	ls For		Code	
Form 990 or	Form 990-EZ	01	Form 990-T (corporat	tion)	07	
Form 990-BL	-	02	Form 1041-A		08	
Form 4720 (individual)	03	Form 4720 (other that	n individual)	09	
Form 990-PF		04	Form 5227		10	
	(sec. 401(a) or 408(a) trust)	05	Form 6069	······································	11	
Form 990-T	(trust other than above)	06	Form 8870		12	
Telephone If the orga If this is for the whole a list with the until for the X	s are in the care of ► PETER NORTON PENO. ► 310 576-7700 Anization does not have an office or place of the property of the group, check this box ►	ousiness in ur digit Gro f it is for pa on is for. poration re exempt org	oup Exemption Number of the group, check to the group, check to guired to file Form 990 ganization return for the	(GEN) . If the this box	ach	
2 If the ta	ax year entered in line 1 is for less than 12 m		·			
	hange in accounting period	A T 1===	0055			
	application is for Form 990-BL, 990-PF, 99	JU-1, 4720	, or 6069, enter the	• • • • • • • • • • • • • • • • • • • •	10 510	
nonrefundable credits. See instructions. 13a \$ 10,518. 15 this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and						
	* *			ļ I	22 200	
	ted tax payments made. Include any prior yea e due. Subtract line 3b from line 3a. Include				23,200.	
	e due. Subtract line 3b from line 3a. molude onic Federal Tax Payment System). See instru	• • •	on mar and rolli, it le	· · · · · · · · · · · · · · · · · · ·	0	
	are going to make an electronic funds withdrawal		it) with this Form 8869 or	3c \$ ee Form 8453-FO and Form 8879-FO fo		
instructions.	and young to make an electronic futius withdrawal	, fau cot ach	., 0000, 50		, payment	
	ct and Paperwork Reduction Act Notice, see instr	uctions.		Form 8868	(Rev. 1-2014)	
					,	

Form 8868 (Re	ev. 1-2014)					Page 2
 If you are 	filing for an Additional (Not Automatic) 3-M	onth Exter	ision, comp	lete only Part	I and check this box.	× X
Note. Only	complete Part II if you have already been gra	nted an au	tomatic 3-m	onth extension	on a previously filed F	orm 8868.
• If you are	filing for an Automatic 3-Month Extension,	complete o	nnly Part I (d	on page 1)		••••
Part II	Additional (Not Automatic) 3-Month Ex	xtension o	of Time. Or	nly file the orio	inal (no copies need	ded)
	Name of exempt organization or other filer, see in	structions	 		nter filer's identifying nu Employer identification	
Type or					Limpioyer lacitamodaon	Humber (Ent) of
* -	THE ISAMBADD KINCDOM DRINES	COCTEMY OF N N		26-4312827		
print	THE ISAMBARD KINGDOM BRUNEL SOCIETY OF N.A. Number, street, and room or suite no. If a P.O. box, see instructions.				Social security number (SSN)	
File by the					Social Security Humber (,3014)
due dale for filing your	225 ARIZONA AVENUE, SUITE 350	INA AVENUE, SUITE 350 st office, state, and ZIP code. For a foreign address, see instructions.				
relum. See		a toreign ad	aress, see ins	tructions.		
instructions.	SANTA MONICA, CA 90401			 		
	eturn code for the return that this application	is for (file a			ach return)	0 4
Application	1	Return	Applicatio	n		Return
Is For		Code	Is For			Code
Form 990 c	or Form 990-EZ	01	Wiffeld.	起於正然接較		學是第一個學家
Form 990-E	BL	02	Form 1041	1-A		08
Form 4720	(individual)	03	Form 4720) (other than in	dividual)	09
Form 990-P	PF	04	Form 522			10
Form 990-1	Γ (sec. 401(a) or 408(a) trust)	05	Form 6069	9		11
Form 990-1	Γ (trust other than above)	06	Form 8870)	····	12
STOPI Do n	ot complete Part II if you were not already	granted an			sion on a previously	filed Form 8868.
If the orga If this is for the whole It with the reduce For cal If the te C	e No. 310 576-7700 anization does not have an office or place of the property of a Group Return, enter the organization's force of the group, check this box	ousiness in ur digit Gro it is for pa n is for. htil ng onths, chec	up Exemption to the growth of	on Number (GEI oup, check this I	N)	. If this is and attach a
8a If this	application is for Forms 990-BL, 990-PF, 99	90-T, 4720	or 6069,	enter the tent	ative tax, less any	
	undable credits. See instructions.				· ·	10,518.
b If this	b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and					
estima	estimated tax payments made. Include any prior year overpayment allowed as a credit and any					
amoun	t paid previously with Form 8868.				81	\$ 23,200.
c Balanc	e Due. Subtract line 8b from line 8a. Include	your paym	ent with this	form, if require		
	onic Federal Tax Payment System). See instruc			•		\$ 0
	Signature and Verifica		st be com	pleted for P		<u> </u>
Under penalti knowledge an	es of perjury, I declare that I have examined the delief, it is true, correct, and complete, and that I a	is form, inc	luding accor	npanying sched	•	d to the best of my
,	alanda Illand			C.P.A.	,	0/15/11
Signature 🕨	FULLY WELLS		Title 🕨	-۱۱۰۱۳-	Dale ▶	5/15/14
	/				Fo	m 8868 (Rev. 1-2014)

THE ISAMBARD KINGDOM BROEL SOCIETY OF N.A.

26-4312827

ATTACHMENT 1

REASON FOR 2ND EXTENSION

AN ATTEMPT TO OBTAIN INFORMATION NECESSARY FOR FILING A RETURN WAS REQUESTED IN A TIMELY FASHION, BUT THE INFORMATION WAS NOT FURNISHED IN SUFFICIENT TIME TO PERMIT THE TIMELY FILING OF THE RETURN, OR THE TAXPAYER PERSONALLY VISITED AN IRS OFFICE FOR THE PURPOSE OF SECURING INFORMATION OR ADVICE AND WAS UNABLE TO MEET WITH AN IRS REPRESENTATIVE