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Form 990-PF

Department of the Treasury
Internal Revenue Service

Estate of Private Foundation

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

Do not enter Social Security numbers on this form as it may be made public.

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

OMB No 1545-0052

2013

Open to Public Inspection

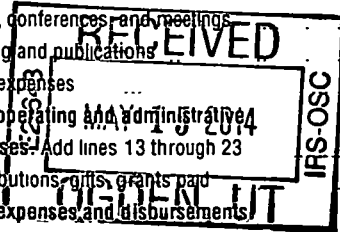
For calendar year 2013 or tax year beginning

, and ending

Name of foundation WINTMAN FAMILY CHARITABLE TRUST B C/O BRUCE I WINTMAN		A Employer identification number 27-6664980
Number and street (or P.O. box number if mail is not delivered to street address) 100 ASHFORD ROAD	Room/suite	B Telephone number 413-933-2204
City or town, state or province, country, and ZIP or foreign postal code LONGMEADOW, MA 01106		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,985,095. (Part I, column (d) must be on cash basis.)	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		2,700.			
2 Check ☒ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		44,058.	44,058.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		20,358.			
b Gross sales price for all assets on line 6a 94,998.					
7 Capital gain net income (from Part IV, line 2)			20,358.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		67,116.	64,416.	0.	
13 Compensation of officers, directors, trustees, etc.		0.	0.	0.	0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 2		5,600.	0.	0.	5,600.
c Other professional fees					
17 Interest					
18 Taxes STMT 3		334.	299.	0.	0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses					
24 Total operating and administrative expenses-Add lines 13 through 23		5,934.	299.	0.	5,600.
25 Contributions, gifts, grants paid		83,124.			83,124.
26 Total expenses and disbursements-Add lines 24 and 25		89,058.	299.	0.	88,724.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<21,942.>			
b Net investment income (if negative, enter -0-)			64,117.		
c Adjusted net income (if negative, enter -0-)				0.	

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Part II Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing		1.	1.	
	2 Savings and temporary cash investments				
	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				
	7 Other notes and loans receivable				
	Less: allowance for doubtful accounts				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock	STMT 4	9,359.	9,804.	21,474.
	c Investments - corporate bonds				
	11 Investments - land, buildings, and equipment basis				
Less: accumulated depreciation					
12 Investments - mortgage loans					
13 Investments - other	STMT 5	1,593,801.	1,572,873.	1,963,620.	
14 Land, buildings, and equipment basis					
Less: accumulated depreciation					
15 Other assets (describe)					
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)		1,603,160.	1,582,678.	1,985,095.	
Liabilities	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe)				
23 Total liabilities (add lines 17 through 22)		0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.	☐			
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.	☒			
	27 Capital stock, trust principal, or current funds		0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund		0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds		1,603,160.	1,582,678.	
	30 Total net assets or fund balances		1,603,160.	1,582,678.	
31 Total liabilities and net assets/fund balances		1,603,160.	1,582,678.		

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	1,603,160.
2 Enter amount from Part I, line 27a	2	<21,942.>
3 Other increases not included in line 2 (itemize) ADJUSTMENT	3	1,460.
4 Add lines 1, 2, and 3	4	1,582,678.
5 Decreases not included in line 2 (itemize)	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,582,678.

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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 778 SHS SMALL-CAP INDEX FUND ADM	P	10/19/10	12/16/13
b 4,263 SHS INTER-TERM BOND INDEX ADM	P	10/19/10	12/16/13
c CAPITAL GAINS DIVIDENDS			
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 40,000.		24,471.	15,529.
b 48,000.		50,169.	<2,169.>
c 6,998.			6,998.
d			
e			

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			15,529.
b			<2,169.>
c			6,998.
d			
e			

2 Capital gain net income or (net capital loss)	2	20,358.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	91,751.	1,735,744.	.052860
2011	36,477.	1,654,050.	.022053
2010	24,191.	1,459,353.	.016577
2009			
2008			

2 Total of line 1, column (d)	2	.091490
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	.030497
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	1,876,085.
5 Multiply line 4 by line 3	5	57,215.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	641.
7 Add lines 5 and 6	7	57,856.
8 Enter qualifying distributions from Part XII, line 4	8	88,724.

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

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Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	641.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	641.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	641.
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	720.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	720.
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	79.
11	Enter the amount of line 10 to be Credited to 2014 estimated tax ☒ 79. Refunded ☐	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ▶ N/A				
14	The books are in care of ▶ BRUCE I WINTMAN Telephone no ▶ 413-567-1007			
Located at ▶ 100 ASHFORD ROAD, LONGMEADOW, MA		ZIP+4 ▶ 01106		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶				X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? N/A	1b	
Organizations relying on a current notice regarding disaster assistance check here ▶ ☐		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013? ☐ Yes ☒ No	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☒ No		
If "Yes," list the years ▶		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

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

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

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here ☐

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870.

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
BRUCE WINTMAN 100 ASHFORD ROAD LONGMEADOW, MA 01106	TRUSTEE 0.00	0.	0.	0.

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

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

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

0

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 NOT APPLICABLE	
	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 N/A	
	0.
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0.

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Part X**Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	1,904,655.
b	Average of monthly cash balances	1b	0.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,904,655.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,904,655.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	28,570.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,876,085.
6	Minimum investment return. Enter 5% of line 5	6	93,804.

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	93,804.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	641.
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	641.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	93,163.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	93,163.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	93,163.

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	88,724.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	88,724.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	641.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	88,083.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				93,163.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			86,059.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 88,724.				
a Applied to 2012, but not more than line 2a			86,059.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				2,665.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				90,498.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

WINTMAN FAMILY CHARITABLE TRUST B

Form 990-PF (2013)

C/O BRUCE I WINTMAN

27-6664980

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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
<i>a Paid during the year</i>				
MISCELLANEOUS CHARITABLE ORGANIZATIONS - SEE ATTACHED				83,124.
Total			3a	83,124.
<i>b Approved for future payment</i>				
NONE				
Total			3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue					
a NONE					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	44,058.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			14	6,998.	13,360.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		51,056.	13,360.
13 Total. Add line 12, columns (b), (d), and (e)			13		64,416.

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

NOT APPLICABLE

Contributions

WINTMAN FAMILY CHARITABLE TRUST B

EIN: 27-6664980

12/31/2013

CHECK #	DESCRIPTION	RELATIONSHIP	STATUS	PURPOSE	AMOUNT
315	Abortion Rights Fund	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
348	Abraham Fund	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,000
293	ACLU	NONE	PUBLIC CHARITY	PUBLIC WELFARE	500
335	ADL	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,000
334	Aesculapian Club	NONE	PUBLIC CHARITY	PUBLIC WELFARE	50
355	AFSH	NONE	PUBLIC CHARITY	MEDICAL	250
349	Aid Still Required	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,000
275	AIDS Foundation of Western Mass	NONE	PUBLIC CHARITY	MEDICAL	500
287	AJW Service	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,000
339	Am Natural History Museum	NONE	PUBLIC CHARITY	PUBLIC WELFARE	600
305	Amnesty Intl	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,000
356	Brady Campaign Gun Violence	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
276	Cliniquita	NONE	PUBLIC CHARITY	PUBLIC WELFARE	200
308	Com Research Initiative NE	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
295	Drama Studio	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
291	Finca Intl	NONE	PUBLIC CHARITY	PUBLIC WELFARE	50
321	Food Bank	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,000
344	Forest Park	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
302	Friends of the Homeless	NONE	PUBLIC CHARITY	PUBLIC WELFARE	772
343	Girls Education Mentoring Service	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,000
309	Greenpeace	NONE	PUBLIC CHARITY	PUBLIC WELFARE	500
307	Gray House	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
300	Habitat for Humanity	NONE	PUBLIC CHARITY	PUBLIC WELFARE	500
347	Hadassah	NONE	PUBLIC CHARITY	PUBLIC WELFARE	50
330	Harvard College	NONE	PUBLIC CHARITY	EDUCATION	100
289	Hebrew Free Loan Assn	NONE	PUBLIC CHARITY	PUBLIC WELFARE	50
353	Heifer Fund	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
270	Heritage Academy	NONE	PUBLIC CHARITY	EDUCATION	300
282	Hillel	NONE	PUBLIC CHARITY	RELIGIOUS	500
301	HIV/AIDS law consortium	NONE	PUBLIC CHARITY	MEDICAL	500
296	HMS	NONE	PUBLIC CHARITY	RELIGIOUS	500
298	Holocaust Museum	NONE	PUBLIC CHARITY	CULTURAL	500
345	Intl Planned Parenthood Federation	NONE	PUBLIC CHARITY	EDUCATION	1,000
346	Intl Rescue Committee	NONE	PUBLIC CHARITY	PUBLIC WELFARE	500
327	Israel Project	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
351	J Street Edu Fund	NONE	PUBLIC CHARITY	EDUCATION	100
271 & 283	JCC	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,040
331	Jewish Family Service	NONE	PUBLIC CHARITY	PUBLIC WELFARE	3,000
297	Jewish Genetic Service	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
274	Links to Library	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,000
310	MEMRI	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
333	Mother Woman Fund	NONE	PUBLIC CHARITY	PUBLIC WELFARE	100
338	Museum of Modern Art	NONE	PUBLIC CHARITY	CULTURAL	140
352	My Jewish Learning	NONE	PUBLIC CHARITY	EDUCATION	36
350	Natl Education Assist. Dog Services	NONE	PUBLIC CHARITY	EDUCATION	250
332	Natl Museum Am Jewish Hx	NONE	PUBLIC CHARITY	CULTURAL	50
320	Natl Park Assn	NONE	PUBLIC CHARITY	PUBLIC WELFARE	50
314	Natl Resources Defense Council	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
354	New Israel Fund	NONE	PUBLIC CHARITY	PUBLIC WELFARE	40,000
318	NPR/WFCR	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,000
323	Open Pantry Com Svcs Inc	NONE	PUBLIC CHARITY	PUBLIC WELFARE	500
329	OREF	NONE	PUBLIC CHARITY	EDUCATION	250
342	Partners in Health	NONE	PUBLIC CHARITY	MEDICAL	1,000
312	Pesticide Action Network	NONE	PUBLIC CHARITY	PUBLIC WELFARE	500
313	Phillips Academy	NONE	PUBLIC CHARITY	EDUCATION	1,000
324	Planned Parenthood MA	NONE	PUBLIC CHARITY	EDUCATION	500
319	Putney School	NONE	PUBLIC CHARITY	EDUCATION	1,000
341	Rache's Table	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
325	Rails to Trails	NONE	PUBLIC CHARITY	PUBLIC WELFARE	50
284	Rays of Hope	NONE	PUBLIC CHARITY	PUBLIC WELFARE	36
316	Red Cross	NONE	PUBLIC CHARITY	MEDICAL	100
303	Salvation Army	NONE	PUBLIC CHARITY	PUBLIC WELFARE	50
306	Sierra Club	NONE	PUBLIC CHARITY	PUBLIC WELFARE	500
288	Smile Train	NONE	PUBLIC CHARITY	PUBLIC WELFARE	100
304	So Poverty Law Ctr	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,000
290	Special Olympics	NONE	PUBLIC CHARITY	PUBLIC WELFARE	100
277	Spfld Public Forum	NONE	PUBLIC CHARITY	PUBLIC WELFARE	150
317	Spfld Rescue Mission	NONE	PUBLIC CHARITY	PUBLIC WELFARE	100
269, 285, 286, & 311	Temple Beth El	NONE	PUBLIC CHARITY	RELIGIOUS	2,750
292	Union of Concerned Scientists	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
336	United Way	NONE	PUBLIC CHARITY	PUBLIC WELFARE	4,000
299	USO	NONE	PUBLIC CHARITY	PUBLIC WELFARE	250
294	Wes U	NONE	PUBLIC CHARITY	EDUCATION	500
337	White Street School	NONE	PUBLIC CHARITY	EDUCATION	1,500
326	Williston	NONE	PUBLIC CHARITY	EDUCATION	1,000
322	Women's Fund of W MA	NONE	PUBLIC CHARITY	PUBLIC WELFARE	1,000
325	Yiddish Book Center	NONE	PUBLIC CHARITY	EDUCATION	250

TOTAL CONTRIBUTIONS

83,124

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
VANGUARD	51,056.	6,998.	44,058.	44,058.	44,058.
TO PART I, LINE 4	51,056.	6,998.	44,058.	44,058.	44,058.

FORM 990-PF	ACCOUNTING FEES				STATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
TAX PREPARATION	2,900.	0.	0.	2,900.	
TAX PREPARATION	2,700.	0.	0.	2,700.	
TO FORM 990-PF, PG 1, LN 16B	5,600.	0.	0.	5,600.	

FORM 990-PF	TAXES				STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES	299.	299.	0.	0.	
MASSACHUSETTS TAXES	35.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	334.	299.	0.	0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT 4
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
BROKERAGE ASSETS	9,804.	21,474.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	9,804.	21,474.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	5
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
VANGUARD FUNDS	COST	1,426,818.	1,793,762.
VANGUARD FUNDS	COST	146,055.	169,858.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,572,873.	1,963,620.