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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2013

Open to Public Inspection

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

Name of foundation HUNTER-MEYERS-REDUS FOUNDATION		A Employer identification number 30-6049569	
Number and street (or P O box number if mail is not delivered to street address) 1100 WEHRLE DRIVE 2ND FLOOR		B Telephone number (see instructions) (716) 842-5506	
City or town, state or province, country, and ZIP or foreign postal code BUFFALO, NY 14221		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ 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) ☒ \$ 1,435,409		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☐ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	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.	35,096	35,069		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	77,570			
	b Gross sales price for all assets on line 6a 328,627				
	7 Capital gain net income (from Part IV , line 2)		77,570		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	112,666	112,639		
	13 Compensation of officers, directors, trustees, etc	16,557	16,557		
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule)				0
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				0
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	2,022	359		0
	19 Depreciation (attach schedule) and depletion . . .	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings		0	0	
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	18,579	16,916	0	0
	25 Contributions, gifts, grants paid	62,000			62,000
	26 Total expenses and disbursements. Add lines 24 and 25	80,579	16,916	0	62,000
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	32,087			
	b Net investment income (if negative, enter -0-)		95,723		
	c Adjusted net income (if negative, enter -0-)			0	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	24,427	21,627	21,627
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0	0
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____ 0			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,071,875	1,106,732	1,413,782
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,096,302	1,128,359	1,435,409	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ 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	1,096,302	1,128,359	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	1,096,302	1,128,359	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,096,302	1,128,359	

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	1,096,302
2	Enter amount from Part I, line 27a	2	32,087
3	Other increases not included in line 2 (itemize) ▶ _____	3	1
4	Add lines 1, 2, and 3	4	1,128,390
5	Decreases not included in line 2 (itemize) ▶ _____	5	31
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,128,359

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	77,570
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	65,000	1,270,281	0 05117
2011	60,000	1,295,454	0 046316
2010	54,000	1,218,625	0 044312
2009	69,846	1,080,961	0 064615
2008	84,309	1,399,775	0 06023

2	Total of line 1, column (d).	2	0 266643
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 053329
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	1,363,702
5	Multiply line 4 by line 3.	5	72,725
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	957
7	Add lines 5 and 6.	7	73,682
8	Enter qualifying distributions from Part XII, line 4. 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	8	62,000

Part VI

Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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	1,914
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	1,914
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	1,914
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1,004	
b Exempt foreign organizations—tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	0	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d.		7	1,004
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	0
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	910
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	
11 Enter the amount of line 10 to be Credited to 2014 estimated tax 0 Refunded		11	0

Part VII-A

Statements Regarding Activities

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?	1a	Yes	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>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.</i>	1b		No
c Did the foundation file Form 1120-POL for this year?.	1c		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
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?	6	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions): ☐ PA _____			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	8b	Yes	
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)? <i>If "Yes," complete Part XIV</i>	9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address				
14	M AND T TRUST COMPANY The books are in care of DIANE M RIMER Telephone no (716) 842-5506 Located at 1100 WEHRLE DRIVE 2ND FLOOR BUFFALO NY ZIP+4 14221			
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.			
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 instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	☐ 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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.		1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?		1c	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years 20 , 20 , 20 , 20	☐ Yes ☒ No		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).		2b	No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ 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.).		3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?		4b	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

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)? (see instructions).	☐ 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)?	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?	☐ 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		No
	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?	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 (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
M AND T TRUST COMPANY	TRUSTEE	16,557		
1100 WEHRLE DRIVE 2ND FLOOR BUFFALO, NY 14221	20			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	1,347,761
b	Average of monthly cash balances.	1b	36,708
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,384,469
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	1,384,469
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	20,767
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,363,702
6	Minimum investment return. Enter 5% of line 5.	6	68,185

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	68,185
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	1,914
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,914
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	66,271
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	66,271
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	66,271

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	62,000
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	62,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	62,000
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				66,271
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			61,592	
b Total for prior years 2011 , 20 , 20		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				0
b From 2009.				0
c From 2010.				0
d From 2011.				0
e From 2012.				0
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2013 from Part XII, line 4 \$ 62,000				
a Applied to 2012, but not more than line 2a			61,592	
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.				408
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 instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				65,863
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	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. . . .				0
b Excess from 2010. . . .				0
c Excess from 2011. . . .				0
d Excess from 2012. . . .				0
e Excess from 2013. . . .				0

Part XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon.					
a	"Assets" alternative test—enter					
	(1) Value of all assets.					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i).					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization.					
	(4) Gross investment income.					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

MT TRUST COMPANY
1100 WEHRLE DRIVE 2ND FLOOR
BUFFALO, NY 14221
(716) 842-5506

b

The form in which applications should be submitted and information and materials they should include

IN WRITING

c

Any submission deadlines

NONE

d

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

NONE

Form 990-PF (2013)

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	62,000
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Form **990-PF** (2013)

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
438 7 GUINNESS ATKINSON CHINA HONG KONG FD		2011-12-29	2013-06-11
999 RS GLOBAL NATURAL RESOURCES FUND		2012-12-13	2013-06-12
333 684 RS GLOBAL NATURAL RESOURCES FUND		2010-04-01	2013-06-12
6 17 FEDERATED STRATEGIC VALUE DIV CL I		2012-12-05	2013-10-29
1636 891 FEDERATED STRATEGIC VALUE DIV CL I		2012-09-04	2013-10-29
169 52 FEDERATED TOTAL RETURN BOND CL I		2012-11-26	2013-10-29
50 56 FORWARD SELECT INCOME FUND CL-INST		2011-12-16	2013-10-29
62 829 HARBOR INTERNATIONAL FUND #11		2003-10-09	2013-10-29
173 348 T ROWE PRICE LRG CAP GROWTH FD INST		2011-10-17	2013-10-29
426 ISHARES HIGH DIVIDEND ETF		2012-09-04	2013-10-29
102 ISHARES HIGH DIVIDEND ETF		2012-11-26	2013-10-29
65 522 LAZARD EMRG MARKETS EQUITY FD CL-I		2012-12-24	2013-10-29
901 926 LAZARD EMRG MARKETS EQUITY FD CL-I		2012-09-04	2013-10-29
1 33 LOOMIS SAYLES SM CAP VALUE FUND CL-I		2012-12-26	2013-10-29
1524 543 LOOMIS SAYLES SM CAP VALUE FUND CL-I		2009-05-21	2013-10-29
456 588 MAINSTAY EPOCH GLBL EQTY YD FD CL-I		2011-10-17	2013-10-29
164 758 PIMCO FDS TOTAL RETURN FUND		2012-11-26	2013-10-29
113 229 T ROWE PRICE DIVIDEND GROWTH FD #58		2011-12-16	2013-10-29
20 085 VANGUARD INTERMEDIATE TERM CORP #571		2012-12-28	2013-10-29
29 601 VANGUARD #94 INSTITUTIONAL INDEX		2006-04-26	2013-10-29
1247 577 CRM MID-CAP VALUE CL I		2012-09-04	2013-10-29
293 848 WELLS FARGO INTERNATIONAL BOND INST		2011-10-17	2013-10-29
350 WISDOMTREE EMRG MKTS EQ INC ETF		2011-12-16	2013-10-29
105 718 ABERDEEN GLBL HIGH INC CL I		2010-04-01	2013-12-13
40 36 BRIDGEWAY ULTRA-SMALL COMP MARKET FD		2006-04-26	2013-12-13
150 306 DREYFUS HIGH YIELD FD - CL I		2010-04-01	2013-12-13
18 444 FEDERATED STRATEGIC VALUE DIV CL I		2013-12-04	2013-12-13
135 373 FEDERATED TOTAL RETURN BOND CL I		2012-11-26	2013-12-13
23 347 T ROWE PRICE LRG CAP GROWTH FD INST		2009-11-06	2013-12-13
146 079 LAZARD EMRG MARKETS EQUITY FD CL-I		2009-04-08	2013-12-13

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
14 951 MORGAN STANLEY FOCUS GROWTH FD CL-I		2013-10-29	2013-12-13
29 559 MSIF MID CAP GROWTH		2013-10-29	2013-12-13
1728 142 PIMCO FDS TOTAL RETURN FUND		2012-12-12	2013-12-13
143 752 RIDGEWORTH SEIX FLTNG RT HI INC FD I		2013-10-29	2013-12-13
9 009 T ROWE PRICE DIVIDEND GROWTH FD #58		2013-12-12	2013-12-13
20 113 T ROWE PRICE DIVIDEND GROWTH FD #58		2011-10-17	2013-12-13
10 994 ROWE PRICE NEW HORIZON FUND INC		2013-10-29	2013-12-13
10 VANGUARD HIGH DIVIDEND YIELD ETF		2013-10-29	2013-12-13
85 405 VANGUARD INTERMEDIATE TERM CORP #571		2013-03-28	2013-12-13
5 578 VANGUARD #94 INSTITUTIONAL INDEX		2006-04-26	2013-12-13
47 711 VANGUARD SMALL-CAP VALUE INDEX #860		2013-10-29	2013-12-13
66 219 WELLS FARGO INTERNATIONAL BOND INST		2013-12-09	2013-12-13
1859 15 WELLS FARGO INTERNATIONAL BOND INST		2012-12-07	2013-12-13
CAPITAL GAIN DIVIDENDS	P		

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
12,187		8,590	3,597
38		37	1
12,540		10,504	2,036
36		31	5
9,625		7,150	2,475
1,875		1,968	-93
1,251		1,108	143
4,513		2,139	2,374
4,483		2,614	1,869
29,909		25,654	4,255
7,161		6,030	1,131
1,324		1,253	71
18,228		15,563	2,665
52		39	13
60,052		39,681	20,371
8,885		6,780	2,105
1,798		1,908	-110
3,691		2,537	1,154
199		208	-9
4,809		3,534	1,275
47,695		36,124	11,571
3,365		3,467	-102
18,938		17,657	1,281
1,074		1,098	-24
721		825	-104
1,013		982	31
105		106	-1
1,486		1,572	-86
611		310	301
2,776		1,677	1,099

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
773		817	-44
1,362		1,330	32
18,560		19,477	-917
1,300		1,301	-1
291		291	
649		445	204
518		515	3
606		606	
839		880	-41
911		666	245
1,083		1,082	1
717		717	
20,135		21,784	-1,649
			20,443

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			3,597
			1
			2,036
			5
			2,475
			-93
			143
			2,374
			1,869
			4,255
			1,131
			71
			2,665
			13
			20,371
			2,105
			-110
			1,154
			-9
			1,275
			11,571
			-102
			1,281
			-24
			-104
			31
			-1
			-86
			301
			1,099

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-44
			32
			-917
			-1
			204
			3
			-41
			245
			1
			-1,649

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TRI COUNTY UNITED WAY 2235 MILLENIUM WAY ENOLA, PA 17025	NONE	PC	PUBLIC SUPPORT	3,000
DAUPHIN COUNTY LIBRARY SYSTEM 101 WALNUT STREET HARRISBURG, PA 17101	NONE	PC	PUBLIC SUPPORT	2,000
HARRISBURG SYMPHONY ASSOCIATION 100 CORPORATE CIRCLE HARRISBURG, PA 17110	NONE	PC	PUBLIC SUPPORT	1,000
HARRISBURG ACADEMY 10 ERFORD ROAD WORMLEYSBURG, PA 17043	NONE	PC	PUBLIC SUPPORT	10,000
ST STEPHEN'S EPISCOPAL CATHEDRAL 221 N FRONT STREET HARRISBURG, PA 17101	NONE	PC	RELIGIOUS	10,000
SALVATION ARMY 1122 GREEN STREET HARRISBURG, PA 17102	NONE	PC	PUBLIC SUPPORT	10,000
PINNACLE HEALTH HOME CARE 17 S SECOND STREET HARRISBURG, PA 17101	NONE	PC	PUBLIC SUPPORT	2,000
HISTORICAL SOCIETY OF DAUPHIN COUNTY 219 SOUTH FRONT STREET HARRISBURG, PA 17104	NONE	PC	PUBLIC SUPPORT	10,000
HARRISBURG YMCA 701 NORTH FRONT STREET HARRISBURG, PA 17101	NONE	PC	CHARITABLE	2,000
CENTRAL PENNSYLVANIA FOO 3908 COREY ROAD HARRISBURG, PA 17109	NONE	PC	CHARITABLE	8,000
DAUPHIN COUNTY SHERIFF 101 MARKET STREET HARRISBURG, PA 17101	NONE	PC	PUBLIC SUPPORT	1,000
BOYS AND GIRLS CLUB OF CENTRAL PA 1227 BERRYHILL ST HARRISBURG, PA 17104	NONE	PC	PUBLIC SUPPORT	2,000
HARRISBURG ART ASSOCIATION 21 N FRONT ST HARRISBURG, PA 17101	NONE	PC	PUBLIC SUPPORT	1,000
Total  3a				62,000

TY 2013 Investments - Other Schedule

Name: HUNTER-MEYERS-REDUS FOUNDATION
EIN: 30-6049569

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BRIDGEWAY ULTRA SMALL CO	AT COST	29,415	29,269
CRM MID CAP VALUE #32			
HARBOR INT'L FUND #11	AT COST	52,847	107,886
LOOMIS SAYLES SMALL CAP			
LSV VALUE EQUITY	AT COST	44,999	75,236
VANGUARD INST INDEX #94	AT COST	94,033	133,433
FEDERATED TOTAL RETURN BD FD	AT COST	85,069	86,651
PIMCO TOTAL RETURN INST CL #35	AT COST	65,984	69,353
RIDGEWORTH SEIX FLOATING RATE	AT COST	48,144	55,799
FEDERATED STRATEGIC VAL FD	AT COST	36,204	64,400
T ROWE PRICE DIV GRWTH FD #58			
T ROWE PRICE INST LGE CAP GW F	AT COST	51,406	105,521
GUINNESS ATKINSON C&HK FD			
LAZARD EMER MKTS PORT INST CL	AT COST	10,811	17,380
MFS EMERGING MARKETS DEBT FUND	AT COST	51,432	48,716
ARTIO GLOBAL HIGH INCOME			
DREYFUS HIGH YIELD FUNE	AT COST	30,292	31,316
ARTISAN MID CAP VALUE FUND	AT COST	57,833	65,143
MORGAN STANLEY FOCUS GROWTH FD	AT COST	57,434	76,664
RS GLOBAL NATURAL RESOUCES			
WELLS FARGO ADVANT INTL BD FD			
FORWARD SELECT INCOME FD INSTI	AT COST	16,216	17,369
MORGAN STANLEY INST MID CAP #28	AT COST	23,489	29,161
WISDOMTREE EMERG MKT EQ INC FD			
LITMAN GREGORY MASTERS INTL	AT COST	24,343	36,137
MAINSTAY EPOCH GLOBAL EQ YD FD	AT COST	16,599	21,737
FRANKLIN INCOME FD AD SHARES	AT COST	18,284	21,503
VANGUARD INTERM-TERM INVEST-GR	AT COST	54,133	58,972
ISHARES HIGH DIVID EQU ETF			
ABERDEEN GLOBAL HIGH INC FD	AT COST	31,222	31,282

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
FPA NEW INCOME FUND	AT COST	20,878	20,697
STERLING CAPITAL MID-CAP VALUE	AT COST	47,414	47,294
T ROWE PRICE NEW HORIZONS	AT COST	22,222	22,039
T ROWE PRICE DIVID GROW FD	AT COST	21,186	43,818
VANGUARD SMALL-CAP VALUE	AT COST	52,338	53,838
MFS INTL NEW DISCOVERY	AT COST	21,652	21,730
VANGUARD HIGH DIVID YLD ETF	AT COST	20,853	21,438

TY 2013 Other Decreases Schedule

Name: HUNTER-MEYERS-REDUS FOUNDATION

EIN: 30-6049569

Description	Amount
COST BASIS ADJ FOR ROC - ABERDEEN GLBL	31

TY 2013 Other Increases Schedule

Name: HUNTER-MEYERS-REDUS FOUNDATION

EIN: 30-6049569

Description	Amount
ROUNDING ADJUSTMENT	1

TY 2013 Taxes Schedule**Name:** HUNTER-MEYERS-REDUS FOUNDATION**EIN:** 30-6049569

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES PRIOR YEAR BALAN	659	0		0
FEDERAL ESTIMATED TAX DEPOSITS	1,004	0		0
FOREIGN TAXES ON QUALIFIED FOR	179	179		0
FOREIGN TAXES ON NONQUALIFIED	180	180		0