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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 separate instructions is at www.irs.gov/form990pf.

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation ENGLISH FAMILY FOUNDATION C/O AMIE BROOKS		A Employer identification number 31-0921799
Number and street (or P.O. box number if mail is not delivered to street address) 500 COMMONS DRIVE	Room/suite	B Telephone number 740-973-4717
City or town, state or province, country, and ZIP or foreign postal code POWELL, OH 43065		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) \$ 2,052,648. (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)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	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	38,499.	38,450.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	149,977.			
	b Gross sales price for all assets on line 6a	810,479.			
	7 Capital gain net income (from Part IV, line 2)		149,977.		
	8 Net short-term capital gain				
Operating and Administrative Expenses	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	188,476.	188,427.		
	13 Compensation of officers, directors, trustees, etc.	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	STMT 2 2,400.	2,160.		0.
	c Other professional fees	STMT 3 19,444.	19,444.		0.
	17 Interest				
	18 Taxes	STMT 4 4,552.	503.		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	26,396.	22,107.		0.	
25 Contributions, gifts, grants paid	87,550.			87,550.	
26 Total expenses and disbursements. Add lines 24 and 25	113,946.	22,107.		87,550.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	74,530.				
b Net investment income (if negative, enter -0-)		166,320.			
c Adjusted net income (if negative, enter -0-)			N/A		

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		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			67,111.	83,404.	83,404.
	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 6			1,805,446.	1,969,244.	1,969,244.
	c Investments - corporate bonds					
	11 Investments - land, buildings, and equipment: basis ▶					
Less: accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other						
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)			1,872,557.	2,052,648.	2,052,648.	
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			1,872,557.	2,052,648.		
30 Total net assets or fund balances			1,872,557.	2,052,648.		
31 Total liabilities and net assets/fund balances			1,872,557.	2,052,648.		

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	1,872,557.
2 Enter amount from Part I, line 27a	2	74,530.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 5	3	105,610.
4 Add lines 1, 2, and 3	4	2,052,697.
5 Decreases not included in line 2 (itemize) ▶ NON-DIVIDEND DISTRIBUTION	5	49.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,052,648.

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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	S/T - SEE ATTACHED SHEET UBS 02229	P	VARIOUS	VARIOUS
b	L/T - SEE ATTACHED SHEET UBS 02229	P	VARIOUS	VARIOUS
c	L/T - SEE ATTACHED SHEET UBS 02229	P	VARIOUS	VARIOUS
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	49,477.		44,458.	5,019.
b	318,116.		297,895.	20,221.
c	442,886.		318,149.	124,737.
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) 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			5,019.
b			20,221.
c			124,737.
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	149,977.
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			
2011			
2010			
2009			
2008			

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

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	3,326.
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	3,326.
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	3,326.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2,460.	
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	2,460.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	16.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	882.	
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 ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in 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?		
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 XIV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>OH</u>		
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

N/A

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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? Website address ► N/A	13	X	
14	The books are in care of ► AMIE BROOKS Telephone no. ► 614-212-8159 Located at ► 500 COMMONS DRIVE, POWELL, OH ZIP+4 ► 43065			
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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No
				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)? Organizations relying on a current notice regarding disaster assistance check here	N/A	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
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
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

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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
ELLEN JULIAN	TRUSTEE			
1300 FOUNTAINE DR.				
COLUMBUS, OH 43221	1.00	0.	0.	0.
AMIE BROOKS	TRUSTEE			
500 COMMONS DRIVE				
POWELL, OH 43065	1.00	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 N/A	
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	
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	1,904,873.
b	Average of monthly cash balances	1b	89,977.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,994,850.
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	1,994,850.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	29,923.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,964,927.
6	Minimum investment return. Enter 5% of line 5	6	98,246.

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	98,246.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	3,326.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	3,326.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	94,920.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	94,920.
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	94,920.

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	87,550.
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	87,550.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	87,550.

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				94,920.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			86,356.	
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: ▶ \$ 87,550.				
a Applied to 2012, but not more than line 2a			86,356.	
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				1,194.
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				93,726.
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				

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ACTION FOR CHILDREN 78 JEFFERSON AVENUE COLUMBUS, OH 43215	NONE	PC	OPERATING FUNDS	3,000.
AMERICAN RED CROSS 995 E. BROAD STREET COLUMBUS, OH 43205	NONE	PC	OPERATING FUNDS	1,000.
BALLET MET 322 MT. VERNON AVE COLUMBUS, OH 43215	NONE	PC	OPERATING FUNDS	2,000.
BETTER BUSINESS BUREAU EDUCATION FOUNDATION 1169 DUBLIN ROAD COLUMBUS, OH 43215	NONE	PC	OPERATING FUNDS	3,000.
BEXLEY EDUCATION FOUNDATION 348 SOUTH CASSINGHAM ROAD COLUMBUS, OH 43209	NONE	PC	OPERATING FUNDS	1,500.
Total	SEE CONTINUATION SHEET(S)			87,550.
b Approved for future payment				
NONE				
Total				0.

FORM 990-PF

DIVIDENDS AND INTEREST FROM SECURITIES

STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
UBS	38,447.	0.	38,447.	38,447.	
UBS	49.	0.	49.	0.	
UBS	3.	0.	3.	3.	
TO PART I, LINE 4	38,499.	0.	38,499.	38,450.	

FORM 990-PF

ACCOUNTING FEES

STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	2,400.	2,160.		0.
TO FORM 990-PF, PG 1, LN 16B	2,400.	2,160.		0.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
UBS	19,444.	19,444.		0.
TO FORM 990-PF, PG 1, LN 16C	19,444.	19,444.		0.

FORM 990-PF

TAXES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	503.	503.		0.
FEDERAL EXCISE TAXES	4,049.	0.		0.
TO FORM 990-PF, PG 1, LN 18	4,552.	503.		0.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	5
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DESCRIPTION	AMOUNT
UNREALIZED GAIN ON INVESTMENTS	105,466.
PRIOR PERIOD ADJUSTMENT PER STATEMENT	144.
TOTAL TO FORM 990-PF, PART III, LINE 3	105,610.

FORM 990-PF	CORPORATE STOCK	STATEMENT	6
-------------	-----------------	-----------	---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MARKET CORPORATE STOCKS HELD BY UBS AS CUSTODIAN	1,969,244.	1,969,244.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,969,244.	1,969,244.

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500 COMMONS DRIVE
POWELL OH 43065-7117

2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715)**

Consistent with IRS guidance, transactions are grouped into section(s) based upon whether the security is covered or noncovered and whether the term is short or long. Transactions for which the term cannot be determined are grouped in a separate section. As a result, the substitute Form 1099-B could have up to five separate sections, each with a heading identifying which securities are included and how to report the transactions on Form 8949. When available, basis information will be displayed in sections where basis is not required to be reported to the IRS. A security is a "covered security" and subject to basis reporting requirements if it is acquired on or after its corresponding effective date. For stock in a corporation, the effective date is January 1, 2011. For stock in a mutual fund, the effective date is January 1, 2012. UBS is not required to report basis to the IRS for any securities acquired before 2011. IRS regulations now require that brokers report short sales for the year in which the short sale is closed. The possible application of the "Constructive Sale" provisions (Sec 1259) for short-against-the-box transactions is not required and thus not reflected here. Clients may wish to discuss the potential application of this provision with their tax advisors.

The cost basis of the oldest security lot (first-in, first-out or FIFO method of accounting) is assigned to a sale to calculate Gain/Loss unless you identified a specific lot (a "versus purchase" or "VSP" order) when you placed your sell order. 2013 Gain/Loss for transactions with trade dates through 12/31/13 has been incorporated into this statement. The net gain or loss for each transaction is calculated based on the sales amount less cost basis with any wash sale loss disallowed. Although we apply wash sale rules to covered lots of identical securities, there are other circumstances to be considered that may result in or negate wash sales. Gain or loss is not calculated on the sale or redemption of certain Structured Products and certain grantor trusts with collectible or foreign currency as it may be ordinary, and not capital, gain or loss. These gains or losses will not be included on the gain or loss subtotal and total amounts. Where applicable, symbol (2) will be printed to the right of the gain or loss subtotal and total amounts. Net gain or loss is not reported to the IRS.

In Box 2a gross proceeds are reported less commissions and option premiums. Sale amounts with "a" symbol indicate where an option premium adjustment has been made. If Box 2b is checked, a loss based on the amount reported in Box 2a is not allowed.

Beginning in 2012, basis for both covered and noncovered securities have been adjusted for all capital changes. Prior to 2012, basis may not have been adjusted for noncovered tax lots. The Original Cost Basis column is only populated for transactions of securities that have had their basis reduced due to premium amortization or increased due to OID accretion. Cost basis for coupon tax-exempt municipal securities (including securities subject to AMT) has been adjusted for mandatory amortization of bond premium. The OID amount reported on your Form 1099-OID is not adjusted for market discount, amortized acquisition premium, or bond premium. Therefore, the amortization and accretion adjustments used here may not be consistent with the Form 1099-OID amounts reported to the IRS because the reporting requirements are different.

Please check with your tax advisor and/or read the tax-related disclosure materials associated with those products.

Type of Gain/Loss: Short Term (Box 1c)

Short-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part I, with **Box A** checked.

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked).

Activity type	Quantity / face value (Box 1c)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8): ACME PACKET INC "CASH MERGER- EFF-04/2013" CUSIP 004764106										
Sell	27 0000		11/05/12	02/04/13	790 61	471 83				318 78
Sell	54 0000		11/05/12	02/28/13	1,575 68	943 65				632 03
Sell	1 0000		11/06/12	02/28/13	29 17	17 48				11 69
Sell	2 0000		11/06/12	03/01/13	58 34	34 95				23 39
Sub Total	84.0000				2,453 80	1,467 91				985 89

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POWELL OH 43065-7117

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In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) ADOBE SYSTEMS INC (DELAWARE)										
					CUSIP 00724F101			Symbol (Box 1d) ADBE		
Sell	41 0000		09/19/12	04/30/13	1,844.76	1,350.87				493.89
Sell	7 0000		11/06/12	11/06/13	383.70	241.04				142.66
Sub Total	48.0000				2,228.46	1,591.91				636.55
Description (Box 8) ALLIANT TECHSYSTEMS INC										
					CUSIP 018804104			Symbol (Box 1d) ATK		
Sell	12.0000		09/06/12	04/16/13	863.74	604.56				259.18
Description (Box 8) AVON PRODUCTS INC										
					CUSIP 054303102			Symbol (Box 1d) AVP		
Sell	25 0000		09/06/12	04/16/13	527.66	385.75				141.91
Sell	6 0000		09/06/12	04/17/13	127.15	92.58				34.57
Sub Total	31 0000				654.81	478.33				176.48
Description (Box 8) BIG LOTS INC										
					CUSIP 089302103			Symbol (Box 1d) BIG		
Sell	25.0000		05/18/12	04/30/13	910.81	883.58				27.23
Sell	9 0000		09/06/12	06/28/13	284.05	278.28				5.77
Sell	7 0000		09/06/12	07/01/13	223.27	216.44				6.83
Sell	5 0000		09/07/12	07/01/13	159.48	153.26				6.22
Sell	10 0000		09/07/12	07/02/13	322.28	306.53				15.75
Sell	2.0000		09/07/12	07/08/13	66.60	61.30				5.30
Sub Total	58.0000				1,966.49	1,899.39				67.10

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In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1c)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) BOSTON SCIENTIFIC CORP										
										CUSIP 101137107 Symbol (Box 1d) BSX
Sell	134 0000		09/06/12	04/16/13	992 52	748 59				243 93
Sell	17 0000		09/06/12	04/17/13	122 73	94 97				27 76
Sub Total	151.0000				1,115.25	843.56				271.69
Description (Box 8) BROOKFIELD ASSET MGMT INC LTD VTG SHS CL A										
										CUSIP 112585104 Symbol (Box 1d) BAM
Sell	5 0000		07/23/13	09/25/13	185 94	188 50				(2.56)
Description (Box 8) CA INC										
										CUSIP 12673P105 Symbol (Box 1d) CA
Sell	22 0000		09/06/12	04/16/13	546 31	591 36				(45 05)
Sell	4 0000		09/06/12	04/17/13	97 15	107 52				(10 37)
Sub Total	26.0000				643.46	698.88				(55.42)
Description (Box 8) COMPASS MINERALS INTL INC										
										CUSIP 20451N101 Symbol (Box 1d) CMP
Sell	2 0000		11/07/12	08/12/13	152 18	156 28				(4 10)
Sell	1 0000		11/07/12	08/14/13	74 20	78 14				(3 94)
Sell	3 0000		11/07/12	08/15/13	219 01	234 42				(15 41)
Sell	2 0000		11/07/12	08/16/13	146 73	156 28				(9 55)
Sell	2 0000		11/07/12	08/19/13	147 31	156 27				(8 96)
Sell	4 0000		11/07/12	08/20/13	295 51	312 56				(17 05)
Sell	1 0000		11/07/12	08/22/13	72 65	78 14				(5 49)
Sell	1 0000		11/07/12	08/23/13	73 33	78 14				(4 81)
Sell	1 0000		11/07/12	08/26/13	74 00	78 14				(4 14)
Sell	1 0000		11/07/12	08/27/13	73 95	78 14				(4 19)

continued next page

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2013 Consolidated Form 1099**Copy 8, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**Short-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part I, with **Box A** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Acct type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) COMPASS MINERALS INTL INC										
						CUSIP 20451N101		Symbol (Box 1d) CMP		
Sell	2 0000		04/30/13	08/27/13	147 91	172 31				(24 40)
Sell	1 0000		04/30/13	08/28/13	73 58	86 15				(12 57)
Sell	1 0000		04/30/13	08/29/13	73 90	86 15				(12 25)
Sell	1 0000		04/30/13	09/04/13	73 02	86 16				(13 14)
Sell	1 0000		04/30/13	09/05/13	73 45	86 15				(12 70)
Sell	1 0000		04/30/13	09/06/13	73 73	86 16				(12 43)
Sell	2 0000		04/30/13	09/10/13	150 45	172 30				(21 85)
Sell	2 0000		04/30/13	09/11/13	150 16	172 31				(22 15)
Sub Total	29 0000				2,145 07	2,354 20				(209 13)
Description (Box 8) DR PEPPER SNAPPLE GROUP INC										
						CUSIP 26138E109		Symbol (Box 1d) DPS		
Sell	6 0000		09/26/13	11/04/13	282 88	269 30				13 58
Description (Box 8) EXPEDITORS INTL WASH INC										
						CUSIP 302130109		Symbol (Box 1d) EXPD		
Sell	11 0000		06/11/12	04/16/13	395 98	430 35				(34 37)
Sell	13 0000		09/06/12	04/16/13	467 98	483 86				(15 88)
Sell	8 0000		09/07/12	04/16/13	287 99	302 79				(14 80)
Sell	3 0000		09/07/12	04/17/13	105 15	113 54				(8 39)
Sub Total	35 0000				1,257 10	1,330 54				(73 44)
Description (Box 8) GOLDMAN SACHS ABSOLUTE RETURN TRACKER FUND CL A										
						CUSIP 38145N246		Symbol (Box 1d) GARTX		
Sell	26 2460		12/05/12	09/25/13	245 40	233 59				11 81

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2013 Consolidated Form 1099

Copy B, For Recipient

Account Number: UE 02229 KM

Tax Identification Number: 31-0921799

Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)Short-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part I, with **Box A** checked. (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8): GUESS INC										
					CUSIP 401617105		Symbol (Box 1d) GES			
Sell	20 0000		05/04/12	04/16/13	525 18	561 61				(36 43)
Sell	27 0000		09/06/12	04/16/13	709 00	713 07				(4 07)
Sell	5 0000		09/06/12	04/17/13	129 11	132 05				(2 94)
Sub Total	52 0000				1,363 29	1,406 73				(43 44)
Description (Box 8): HASBRO INC										
					CUSIP 418056107		Symbol (Box 1d) HAS			
Sell	15 0000		09/06/12	04/16/13	660 82	570 90				89 92
Sell	3 0000		09/06/12	04/17/13	130 20	114 18				16 02
Sub Total	18 0000				791 02	685 08				105 94
Description (Box 8): HEALTH NET INC										
					CUSIP 42222G108		Symbol (Box 1d) HNT			
Sell	41 0000		09/19/12	04/16/13	1,171 35	898 11				273 24
Sell	25 0000		09/20/12	04/16/13	714 24	552 99				161 25
Sell	26 0000		11/06/12	04/16/13	742 81	670 33				72 48
Sell	5 0000		11/06/12	04/17/13	140 26	128 91				11 35
Sub Total	97 0000				2,768 66	2,250 34				518 32
Description (Box 8): HUMANA INC										
					CUSIP 444859102		Symbol (Box 1d) HUM			
Sell	18 0000		11/05/12	04/16/13	1,368 14	1,340 36				27 78
Sell	1 0000		11/05/12	04/17/13	74 86	74 45				0 40
Sub Total	19 0000				1,443 00	1,414 82				28 18

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In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8): INVESCO BALANCED-RISK ALLOCATION FUND A										
						CUSIP 00141V747		Symbol (Box 1d): ABRZX		
Sell	400 5180		12/07/12	09/25/13	5,082.58	4,982.44				100.14
Sell	292 3670		12/07/12	09/25/13	3,710.13	3,637.05				73.08
Sell	192 7910		12/07/12	09/25/13	2,446.52	2,398.32				48.20
Sub Total	885.6760				11,239.23	11,017.81				221.42
Description (Box 8): ITT CORP										
						CUSIP 450911201		Symbol (Box 1d): ITT		
Sell	21 0000		04/30/13	10/17/13	768.21	579.77				188.44
Sell	9 0000		09/26/13	10/17/13	329.24	324.72				4.52
Sell	4 0000		09/26/13	10/18/13	147.85	144.32				3.53
Sub Total	34.0000				1,245.30	1,048.81				196.49
Description (Box 8): LABORATORY CORP AMER HLDGS NEW										
						CUSIP 50540R409		Symbol (Box 1d): LH		
Sell	5.0000		06/07/13	09/25/13	495.69	498.62				(2.93)
Description (Box 8): LUFKIN INDUSTRIES INC										
						CUSIP 549764108				
Sell	26 0000		11/07/12	04/16/13	2,296.21	1,322.24				973.97
Sell	2 0000		11/07/12	04/17/13	176.10	101.71				74.39
Sub Total	28 0000				2,472.31	1,423.95				1,048.36
Description (Box 8): MOLEX INC **MERGER EFF: 12/2013**										
						CUSIP 608554101				
Sell	30 0000		04/30/13	09/09/13	1,155.73	822.49				333.24
Sell	23 0000		05/01/13	09/09/13	886.06	628.46				257.60

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In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

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Description (Box 8) MOLEX INC **MERGER EFF 12/2013**										
										CUSIP 608554101
Sell	6 0000		05/01/13	09/10/13	231 59	163 94				67 65
Sub Total	59 0000				2,273.38	1,614.89				658.49
Description (Box 8) PEOPLE'S UNITED FINANCIAL INC										
										CUSIP 712704105 Symbol (Box 1d) PBCI
Sell	31 0000		05/04/12	04/16/13	404 19	378 96				25 23
Sell	70 0000		09/06/12	04/16/13	912 70	855 90				56 80
Sell	10 0000		09/06/12	04/17/13	129 19	122 27				6 92
Sub Total	111 0000				1,446.08	1,357.13				88.95
Description (Box 8) PICO HOLDINGS INC NEW										
										CUSIP 693366205 Symbol (Box 1d) PICO
Sell	17 0000		09/05/12	05/14/13	368 60	381 43				(12 83)
Sell	2 0000		09/06/12	05/15/13	42 84	44 87				(2 03)
Sub Total	19 0000				411.44	426.30				(14 86)
Description (Box 8) PITNEY BOWES INC										
										CUSIP 724479100 Symbol (Box 1d) PBI
Sell	9 0000		05/04/12	04/16/13	131 84	154 43				(22 59)
Sell	2 0000		05/04/12	04/16/13	29 30	34 51				(5 21)
Sell	3 0000		05/07/12	04/16/13	43 95	51 57				(7 62)
Sell	10 0000		05/07/12	04/16/13	146 49	169 57				(23 08)
Sell	23 0000		05/25/12	04/16/13	336 93	320 91				16 02

continued next page

UBS Financial Services Inc.

1000 Harbor Boulevard
Weehawken, NJ 07086-6790
Federal ID 13-2638165

Your Financial Advisor:
THE MEDSKER KHALAF GROUP
614-442-6240/800-421-6172

Payer:
THE ENGLISH FAMILY FOUNDATION
ATTN: AMIE ENGLISH BROOKS
500 COMMONS DRIVE
POWELL OH 43065-7117

2013 Consolidated Form 1099

Copy B, For Recipient

Account Number: UE 02229 KM

Tax Identification Number: 31-0921799

Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)Short-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part I, with **Box A** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (f)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (f)	Cost or other basis (Box 3) (f)	Wash sale loss disallowed (Box 5) (f)	Federal income tax withheld (Box 4) (f)	Loss not allowed (Box 2b)	Gain/Loss (f)
Description (Box 8) PITNEY BOWES INC										
					CUSIP 724479100		Symbol (Box 1d) PBI			
Sell	30 0000		09/06/12	04/16/13	439 48	412 80				26 68
Sell	8 0000		09/06/12	04/17/13	114 00	110 08				3 92
Sub Total	85 0000				1,241 99	1,253 87				(11 88)
Description (Box 8) POTASH CORP SASK INC CANADA CAD										
					CUSIP 73755L107		Symbol (Box 1d) POT			
Sell	16 0000		09/21/12	09/13/13	529 55	704 57				(175 02)
Description (Box 8) QUEST DIAGNOSTICS INC										
					CUSIP 74834L100		Symbol (Box 1d) DGX			
Sell	4 0000		09/06/12	04/16/13	234 75	249 72				(14 97)
Sell	2 0000		09/06/12	04/17/13	116 41	124 86				(8 45)
Sub Total	6 0000				351 16	374 58				(23 42)
Description (Box 8) SPDR S&P WORLD EX-US ETF										
					CUSIP 78463X889		Symbol (Box 1d) GWL			
Sell	21 0000		01/07/13	09/25/13	591 38	535 27				56 11
Sell	35 0000		07/05/13	09/25/13	985 63	885 15				100 48
Sub Total	56 0000				1,577 01	1,420 42				156 59
Description (Box 8) TELLABS INC *MERGER-EFF-12/2013*										
					CUSIP 879664100					
Sell	100 0000		09/06/12	04/16/13	196 64	362 55				(165 91)
Sell	25 0000		09/06/12	04/17/13	48 59	90 64				(42 05)
Sub Total	125 0000				245 23	453 19				(207 96)

continued next page



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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**Short-term transactions reported on Form 1099-B - Basis reported to the IRS, Report on Form 8949, Part I, with **Box A** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8). TEREX CORP DELA NEW										
					CUSIP 880779103			Symbol (Box 1d) TEX		
Sell	9 0000		03/29/12	01/04/13	266 68	200.77				65 91
Sell	2 0000		05/25/12	01/04/13	59 27	33.90				25 37
Sell	1 0000		05/31/12	01/04/13	29.63	16.73				12 90
Sell	4 0000		05/31/12	01/07/13	118 25	66 91				51.34
Sell	2 0000		05/31/12	01/07/13	59 12	33 53				25 59
Sub Total	18 0000				532.95	351 84				181 11
Description (Box 8). TRANSOCEAN LTD CHF										
					CUSIP H8817H100			Symbol (Box 1d) RIG		
Sell	12.0000		01/23/13	09/09/13	565 92	671.88				(105 96)
Description (Box 8). UGI CORP NEW										
					CUSIP 902681105			Symbol (Box 1d) UGI		
Sell	10 0000		09/06/12	04/16/13	397 29	314 60				82 69
Sell	3 0000		09/06/12	04/17/13	117 28	94 38				22 90
Sub Total	13 0000				514.57	408 98				105.59
Description (Box 8). VISA INC CL A										
					CUSIP 92826C839			Symbol (Box 1d) V		
Sell	1 0000		04/24/13	09/25/13	191.88	167 22				24.66
Description (Box 8). WALT DISNEY CO (HOLDING CO) DISNEY COM										
					CUSIP 254687106			Symbol (Box 1d) DIS		
Sell	8 0000		09/26/12	09/25/13	517.14	415 76				101 38

continued next page

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**Short-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part I, with **Box A** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) WESTERN UNION CO										
					CUSIP 959802109		Symbol (Box 1d) WUJ			
Sell	30 0000		05/04/12	04/16/13	447 99	530 40				(82 41)
Sell	43 0000		09/06/12	04/16/13	642 13	765 83				(123 70)
Sell	9 0000		09/05/12	04/17/13	131 32	150 29				(28 97)
Sub Total	82 0000				1,221 44	1,456 52				(235 08)
Description (Box 8) WILEY JOHN & SONS INC CL A										
					CUSIP 968223206		Symbol (Box 1d) JW A			
Sell	2 0000		06/26/13	11/04/13	99 06	79 52				19 54
Sell	2 0000		06/27/13	11/04/13	99 07	80 05				19 02
Sell	1 0000		06/28/13	11/04/13	49 53	40 31				9 22
Sell	1 0000		06/28/13	11/15/13	49 91	40 30				9 61
Sell	3 0000		07/01/13	11/15/13	149 72	122 39				27 33
Sell	1 0000		07/02/13	11/15/13	49 90	40 87				9 03
Sell	4 0000		09/26/13	11/15/13	199 63	189 72				9 91
Sub Total	14 0000				696 82	593 16				103 66
Description (Box 8) XLINX INC										
					CUSIP 983919101		Symbol (Box 1d) XLNX			
Sell	5 0000		11/06/12	11/04/13	226 23	168 73				57 50
Sell	8 0000		11/06/12	11/04/13	361 31	269 96				91 35
Sub Total	13 0000				587 54	438 69				148 85

continued next page



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2013 Consolidated Form 1099

Copy B, For Recipient

Account Number: UE 02229 KM

Tax Identification Number: 31-0921799

Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)Short-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part I, with **Box A** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) XYLEM INC										
					CUSIP 98419M100		Symbol (Box 1d) XYL			
Sell	22.0000		09/06/12	04/16/13	604.01	544.06				59.95
Sell	4.0000		09/06/12	04/17/13	108.23	98.92				9.31
Sub Total	26.0000				712.24	642.98				69.26
Short-term total										
Box A, Part I	2,313.9220				\$49,477.24	\$44,458.81				\$5,018.43

Type of Gain/Loss: Long Term (Box 1c)Long-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part II, with **Box D** checked

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) ADOBE SYSTEMS INC (DELAWARE)										
					CUSIP 00724F101		Symbol (Box 1d) ADBE			
Sell	3.0000		09/19/12	11/06/13	164.45	98.84				65.61
Sell	4.0000		11/06/12	11/07/13	215.53	137.74				77.79
Sub Total	7.0000				379.98	236.58				143.40
Description (Box 8) AIR PROD & CHEMICAL INC										
					CUSIP 009158106		Symbol (Box 1d) APD			
Sell	9.0000		04/05/12	09/25/13	970.36	815.28				155.08

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2013 Consolidated Form 1099

Copy B, For Recipient
Account Number: UE 02229 KM
Tax Identification Number: 31-0921799

Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)

Long-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part II, with **Box D** checked. (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8): ALLIANT TECHSYSTEMS INC										
					CUSIP 018804104		Symbol (Box 1d) ATK			
Sell	1.0000		04/25/11	04/16/13	71.98	68.98				3.00
Sell	4.0000		08/25/11	04/16/13	287.91	239.39				48.52
Sell	7.0000		03/29/12	04/16/13	503.85	350.52				153.33
Sell	3.0000		09/06/12	04/16/13	215.94	216.08				(0.14)
Sell	2.0000		09/06/12	04/17/13	141.91	144.06				(2.15)
Sub Total	17.0000				1,221.59	1,019.03				202.56
Description (Box 8): AMERICAN CENTURY EQUITY MARKET NEUTRAL CL A										
					CUSIP 02507M758		Symbol (Box 1d) ALIAX			
Sell	42.0030		09/06/12	09/25/13	451.53	437.25				14.28
Description (Box 8): AVON PRODUCTS INC										
					CUSIP 054303102		Symbol (Box 1d) AVP			
Sell	33.0000		03/14/11	04/16/13	696.51	887.74				(191.23)
Sell	10.0000		06/21/11	04/16/13	211.06	282.22				(71.16)
Sell	17.0000		08/02/11	04/16/13	358.80	433.00				(74.20)
Sell	5.0000		08/25/11	04/16/13	105.53	108.55				(3.02)
Sell	10.0000		01/27/12	04/16/13	211.07	274.16				(63.09)
Sell	4.0000		03/29/12	04/16/13	84.42	108.88				(24.46)
Sell	7.0000		03/29/12	04/16/13	147.74	133.55				14.19
Sub Total	86.0000				1,815.13	2,228.10				(412.97)
Description (Box 8): BIG LOTS INC										
					CUSIP 089302103		Symbol (Box 1d) BIG			
Sell	3.0000		05/18/12	06/26/13	94.27	106.03				(11.76)
Sell	3.0000		06/11/12	06/26/13	94.26	114.01				(19.75)

continued next page



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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**

Long-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part II, with **Box D** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) BIG LOTS INC										
						CUSIP 089302103		Symbol (Box 1d) BIG		
Sell	5 0000		06/11/12	06/27/13	157.54	190.01				(32.47)
Sell	2 0000		06/11/12	06/27/13	63.68	75.00				(12.32)
Sell	6 0000		06/11/12	06/28/13	189.36	228.01				(38.65)
Sub Total	19.0000				599.11	714.06				(114.95)
Description (Box 8) BOSTON SCIENTIFIC CORP										
						CUSIP 101137107		Symbol (Box 1d) BSX		
Sell	45 0000		08/25/11	04/16/13	333.31	287.10				46.21
Sell	71 0000		03/29/12	04/16/13	525.88	425.79				100.09
Sub Total	116.0000				859.19	712.89				146.30
Description (Box 8) CA INC										
						CUSIP 12673P105		Symbol (Box 1d) CA		
Sell	7 0000		08/02/11	04/16/13	173.82	151.05				22.77
Sell	15 0000		08/15/11	04/16/13	372.49	303.78				68.71
Sell	13 0000		08/18/11	04/16/13	322.81	246.89				75.92
Sell	7 0000		08/25/11	04/16/13	173.83	138.23				35.60
Sell	12 0000		03/29/12	04/16/13	297.98	329.61				(31.63)
Sub Total	54 0000				1,340.93	1,169.56				171.37

continued next page

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In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked).

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8): DR PEPPER SNAPPLE GROUP INC										
					CUSIP 26138E109		Symbol (Box 1d) DPS			
Sell	25 0000		05/18/12	11/04/13	1,178.69	1,007.46				171.23
Sell	8 0000		09/06/12	11/04/13	377.18	360.08				17.10
Sub Total	33 0000				1,555.87	1,367.54				188.33
Description (Box 8): EXPEDITORS INTL WASH INC										
					CUSIP 302130109		Symbol (Box 1d) EXPD			
Sell	2.0000		08/25/11	04/16/13	72.00	86.90				(14.90)
Description (Box 8): GAMESTOP CORP NEW (HOLDING CO) CL A										
					CUSIP 36467W109		Symbol (Box 1d) GME			
Sell	11 0000		05/04/12	07/24/13	477.26	241.07				236.19
Sell	1 0000		05/04/12	07/25/13	43.46	21.92				21.54
Sell	6 0000		05/07/12	07/25/13	260.75	129.26				131.49
Sub Total	18 0000				781.47	392.25				389.22
Description (Box 8): GOLDMAN SACHS ABSOLUTE RETURN TRACKER FUND CL A										
					CUSIP 38145N246		Symbol (Box 1d) GARTX			
Sell	515.3910		03/29/12	09/25/13	4,818.91	4,638.52				180.39
Description (Box 8): GUESS INC										
					CUSIP 401617105		Symbol (Box 1d) GES			
Sell	11 0000		12/15/11	04/16/13	288.85	314.10				(25.25)
Sell	8 0000		01/27/12	04/16/13	210.07	280.87				(70.80)
Sell	5 0000		01/27/12	04/16/13	131.30	146.65				(15.35)

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In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / Face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1d)	Date of sale / exchange (Box 1e)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) GUESS INC										
					CUSIP 401617105		Symbol (Box 1d) GES			
Sell	4 0000		03/29/12	04/16/13	105 04	146 75				(41 71)
Sell	5 0000		03/29/12	04/16/13	131 29	156 88				(25 59)
Sub Total	33 0000				866 55	1,045.25				(178.70)
Description (Box 8) GUGGENHEIM MANAGED FUTURES STRATEGY FUND A										
					CUSIP 78356A517		Symbol (Box 1d) RYMTX			
Sell	167 2870		02/15/12	09/25/13	3,489 61	3,907.82				(418.21)
Description (Box 8) HARLEY DAVIDSON INC										
					CUSIP 412822108		Symbol (Box 1d) HOG			
Sell	16 0000		08/25/11	09/25/13	1,027.18	545.92				481.26
Description (Box 8) HASBRO INC										
					CUSIP 418056107		Symbol (Box 1d) HAS			
Sell	1 0000		10/12/11	04/16/13	44 05	34 82				9 23
Sell	10 0000		10/31/11	04/16/13	440 55	382 36				58 19
Sell	10 0000		01/27/12	04/16/13	440 55	351 57				88 98
Sell	6 0000		03/29/12	04/16/13	264 32	222 28				42 04
Sub Total	27.0000				1,189 47	991 03				198.44
Description (Box 8) INVESCO BALANCED-RISK ALLOCATION FUND A										
					CUSIP 00141V747		Symbol (Box 1d) ABRZX			
Sell	98 8120		02/15/12	04/24/13	1,256 89	1,221 31				35 58
Sell	10,874 5680		02/15/12	09/25/13	137,998 27	134,409 67				3,588 60
Sell	6,231 1950		03/29/12	09/25/13	79,073.86	77,329 13				1,744 73
Sub Total	17,204.5750				218,329.02	212,960.11				5,368 91

continued next page

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Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)

Long-term transactions reported on Form 1099-B - basis reported to the IRS; Report on Form 8949, Part II, with **Box D** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) ISHARES TRUST CORE S&P SMALL-CAP ETF CUSIP: 464287804 Symbol (Box 1d) UR										
Sell	63 0000		03/29/12	09/25/13	6,265.08	4,777.07				1,488.01
Description (Box 8) ITT CORP CUSIP: 450911201 Symbol (Box 1d) ITT										
Sell	11 0000		09/25/12	10/15/13	402.11	228.24				173.87
Sell	4 0000		09/25/12	10/15/13	146.01	83.00				63.01
Sell	5 0000		09/25/12	10/16/13	182.03	103.75				78.28
Sell	23 0000		09/26/12	10/16/13	837.35	467.79				369.56
Sell	12 0000		09/28/12	10/16/13	436.88	239.98				196.90
Sell	3 0000		10/01/12	10/16/13	109.22	59.99				49.23
Sell	5 0000		10/01/12	10/16/13	181.71	99.98				81.73
Sell	4 0000		10/01/12	10/17/13	146.33	79.98				66.35
Sub Total	67.0000				2,441.64	1,362.71				1,078.93
Description (Box 8) KELLOGG CO CUSIP: 487836108 Symbol (Box 1d) K										
Sell	10 0000		05/18/12	11/15/13	625.85	502.73				123.12
Sell	10 0000		05/18/12	11/19/13	617.78	502.73				115.05
Sell	9 0000		06/11/12	11/20/13	552.73	437.32				115.41
Sub Total	29.0000				1,796.36	1,442.78				353.58

continued next page



UBS Financial Services Inc.

1000 Harbor Boulevard
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Your Financial Advisor:

THE MEDSKER KHALAF GROUP
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Payer:

THE ENGLISH FAMILY FOUNDATION
ATTN: AMIE ENGLISH BROOKS
500 COMMONS DRIVE
POWELL OH 43065-7117

2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**Long-term transactions reported on Form 1099-B - basis reported to the IRS; Report on Form 8949, Part II, with **Box D** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1c)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8): LINEAR TECHNOLOGY CORP (DELAWARE)										
					CUSIP 535678106		Symbol (Box 1d) LLTC			
Sell	9 0000		08/15/11	11/04/13	365 84	249 69				116 15
Sell	2 0000		08/25/11	11/04/13	81 30	54 30				27 00
Sub Total	11 0000				447.14	303 99				143.15
Description (Box 8): MONSANTO CO NEW										
					CUSIP 61166W101		Symbol (Box 1d) MON			
Sell	8 0000		08/25/11	07/24/13	819 21	557 93				261 28
Sell	16 0000		08/25/11	09/25/13	1,687 97	1,115 86				572 11
Sub Total	24 0000				2,507.18	1,673.79				833.39
Description (Box 8): NTHN TRUST CORP										
					CUSIP 665859104		Symbol (Box 1d) NTRS			
Sell	8.0000		05/13/11	11/04/13	452.55	385.80				66.75
Description (Box 8): ORACLE CORP										
					CUSIP 68389X105		Symbol (Box 1d) ORCL			
Sell	39 0000		06/28/12	09/25/13	1,327.27	1,086 97				240 30
Description (Box 8): PEOPLE'S UNITED FINANCIAL INC										
					CUSIP 712704105		Symbol (Box 1d) PBCT			
Sell	16 0000		05/19/11	04/16/13	208 62	215 01				(6 39)
Sell	22 0000		08/18/11	04/16/13	286 85	236 30				50 55
Sell	17 0000		08/25/11	04/16/13	221 65	186 66				34 99
Sell	31 0000		03/29/12	04/16/13	404 20	406 72				(2 52)
Sub Total	86 0000				1,121.32	1,044.69				76.63

continued next page

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**Long-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part II, with **Box D** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) PRIZER INC										
					CUSIP 717081103		Symbol (Box 1d) PFE			
Sell	11 0000		08/25/11	01/04/13	285 64	198 85				86 79
Sell	39 0000		08/25/11	01/18/13	1,031 37	705 02				326 35
Sub Total	50 0000				1,317 01	903 87				413 14
Description (Box 8) PICO HOLDINGS INC NEW										
					CUSIP 693366205		Symbol (Box 1d) PICO			
Sell	4 0000		10/13/11	05/07/13	88 51	83 98				4 53
Sell	8 0000		10/13/11	05/08/13	174 38	167 95				6 43
Sell	8 0000		10/13/11	05/09/13	173 79	167 96				5 83
Sell	5 0000		10/13/11	05/10/13	106 18	104 97				1 21
Sell	2 0000		10/13/11	05/13/13	42 61	41 99				0 62
Sell	5 0000		03/29/12	05/13/13	106 52	116 09				(9 57)
Sell	2 0000		03/29/12	05/14/13	43 37	46 43				(3 06)
Sub Total	34 0000				735 36	729 37				5 99
Description (Box 8) PITNEY BOWES INC										
					CUSIP 724479100		Symbol (Box 1d) PBI			
Sell	9 0000		03/16/12	04/16/13	131 84	162 64				(30 80)
Sell	5 0000		03/19/12	04/16/13	73 25	90 51				(17 26)
Sell	3 0000		03/19/12	04/16/13	43 95	54 28				(10 33)
Sell	11 0000		03/20/12	04/16/13	161 14	198 34				(37 20)
Sell	8 0000		03/20/12	04/16/13	117 19	144 52				(27 33)
Sell	11 0000		03/21/12	04/16/13	161 14	199 81				(38 67)

continued next page



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2013 Consolidated Form 1099**Copy 3, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**Long-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part II, with **Box D** checked. (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / Face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8): PITNEY BOWES INC										
					CUSIP 724479100		Symbol (Box 1d) PBI			
Sell	7.0000		03/22/12	04/16/13	102.55	126.91				(24.36)
Sell	8.0000		03/29/12	04/16/13	117.19	142.13				(24.94)
Sub Total	62.0000				908.25	1,119.14				(210.89)
Description (Box 8): POTASH CORP SASK INC CANADA CAD										
					CUSIP 73755L107		Symbol (Box 1d) POT			
Sell	30.0000		03/29/12	09/13/13	992.92	1,354.33				(361.41)
Description (Box 8): QUEST DIAGNOSTICS INC										
					CUSIP 74834L100		Symbol (Box 1d) DGX			
Sell	2.0000		08/25/11	04/16/13	117.38	95.26				22.12
Sell	3.0000		03/29/12	04/16/13	176.07	182.79				(6.72)
Sub Total	5.0000				293.45	278.05				15.40
Description (Box 8): SAFEWAY INC										
					CUSIP 786514208		Symbol (Box 1d) SWY			
Sell	29.0000		02/04/11	04/30/13	659.24	611.52				47.72
Sell	10.0000		02/28/11	04/30/13	227.33	217.48				9.85
Sell	4.0000		07/29/11	04/30/13	90.93	80.58				10.35
Sub Total	43.0000				977.50	909.58				67.92
Description (Box 8): SCHWAB CHARLES CORP NEW										
					CUSIP 808513105		Symbol (Box 1d) SCHW			
Sell	24.0000		10/12/11	09/11/13	533.21	302.61				230.60
Sell	26.0000		12/15/11	09/11/13	577.65	283.76				293.89
Sell	23.0000		03/29/12	09/11/13	510.99	328.40				182.59

continued next page

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2013 Consolidated Form 1099

Copy B, For Recipient
Account Number: UE 02229 KM
Tax Identification Number: 31-0921799

Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)

Long-term transactions reported on Form 1099-B - basis reported to the IRS; Report on Form 8949, Part II, with **Box D** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) SCHWAB CHARLES CORP NEW										
					CUSIP 808513105		Symbol (Box 1d) SCHW			
Sell	27 0000		05/04/12	09/11/13	599 87	365 57				234.30
Sell	74 0000		09/06/12	09/11/13	1,544 07	1,022 42				621.65
Sub Total	174.0000				3,865 79	2,302 76				1,563.03
Description (Box 8) SPDR S&P WORLD EX-US ETF										
					CUSIP 78463X889		Symbol (Box 1d) GVL			
Sell	27 0000		01/03/12	09/25/13	760 34	1605 61				154 73
Sell	351 0000		03/29/12	09/25/13	9,884 48	8 518 73				1,365 75
Sell	26 0000		06/28/12	09/25/13	732 18	558 48				173 70
Sell	1,087 0000		09/06/12	09/25/13	30,610 91	25,626 57				4,984 34
Sub Total	1,491 0000				41,987.91	35,309 39				6,678.52
Description (Box 8) TELLABS INC *MERGER-EFF-12/2013*										
					CUSIP 879664100					
Sell	221 0000		08/18/11	04/16/13	434 57	830 52				(395 95)
Sell	20 0000		08/25/11	04/16/13	39 32	75 40				(36 08)
Sell	20 0000		02/24/12	04/16/13	39 33	79 82				(40 49)
Sell	20 0000		02/29/12	04/16/13	39 33	79 46				(40 13)
Sell	28 0000		03/01/12	04/16/13	55 06	110 70				(55 64)
Sell	14 0000		03/02/12	04/16/13	27 52	55 27				(27 75)
Sell	33 0000		03/29/12	04/16/13	64 89	131 94				(67 05)
Sub Total	356.0000				700 02	1,363.11				(663 09)

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**

Long-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part II, with **Box D** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 5b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) TEREX CORP DELA NEW										
					CUSIP 880779103		Symbol (Box 1d) TEX			
Sell	9 0000		10/12/11	01/04/13	266.69	118.60				148.09
Description (Box 8) TRANSOCEAN LTD CHF										
					CUSIP H8817H100		Symbol (Box 1d) RIG			
Sell	5 0000		08/25/11	04/16/13	244.18	253.10				(8.92)
Sell	20 0000		12/15/11	04/16/13	976.71	789.54				187.17
Sell	3 0000		12/15/11	04/17/13	141.45	118.44				23.01
Sell	2 0000		12/15/11	09/09/13	94.32	78.95				15.37
Sell	3 0000		03/29/12	09/09/13	141.48	158.22				(16.74)
Sell	9 0000		06/11/12	09/09/13	424.44	377.98				46.46
Sell	12 0000		09/06/12	09/09/13	565.91	568.20				(2.29)
Sub Total	54 0000				2,588.49	2,344.43				244.06
Description (Box 8) UGI CORP NEW										
					CUSIP 902681105		Symbol (Box 1d) UGI			
Sell	3 0000		08/25/11	04/16/13	119.18	84.71				34.47
Sell	5 0000		03/29/12	04/16/13	198.64	135.98				62.66
Sub Total	8 0000				317.82	220.69				97.13
Description (Box 8) WALT DISNEY CO (HOLDING CO) DISNEY COM										
					CUSIP 254687106		Symbol (Box 1d) DIS			
Sell	26 0000		08/18/11	04/25/13	1,607.39	844.93				762.46
Sell	32 0000		08/18/11	09/25/13	2,068.54	1,039.91				1,028.63
Sell	10 0000		08/25/11	09/25/13	646.42	319.90				326.52
Sub Total	68 0000				4,322.35	2,204.74				2,117.61

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**

Long-term transactions reported on Form 1099-B - basis reported to the IRS, Report on Form 8949, Part II, with **Box D** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) WEATHERFORD INTL LTD CHF										
					CUSIP H27013103		Symbol (Box 1d) WFT			
Sell	29 0000		03/17/11	07/24/13	400 17	591 60				(191 43)
Sell	14 0000		04/21/11	07/24/13	193 18	286 87				(93 69)
Sell	16 0000		05/06/11	07/24/13	220 79	326 03				(105 24)
Sell	12 0000		05/12/11	07/24/13	165 58	239 18				(73 60)
Sell	23 0000		05/19/11	07/24/13	317 38	449 41				(132 03)
Sell	2 0000		06/21/11	09/09/13	31 31	34 82	3 51			0 00
Sell	2 0000		06/21/11	09/10/13	31 17	34 82	3 65			0 00
Sell	4 0000		06/21/11	09/11/13	62 57	69 65	7 08			0 00
Sell	2 0000		06/21/11	09/11/13	31 39	34 82	3 43			0 00
Sub Total	104 0000				1,453 54	2,067 20	17 67			(595.99)
Description (Box 8) WESTERN UNION CO										
					CUSIP 959802109		Symbol (Box 1d) WU			
Sell	13 0000		08/15/11	04/16/13	194 13	220 71				(26 58)
Sell	7 0000		08/25/11	04/16/13	104 53	114 03				(9 50)
Sell	22 0000		09/22/11	04/16/13	328 53	332 82				(4 29)
Sell	11 0000		10/12/11	04/16/13	164 27	183 67				(19 40)
Sell	15 0000		03/29/12	04/16/13	224 00	266 67				(42 67)
Sub Total	68 0000				1,015 46	1,117 90				(102.44)

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2013 Consolidated Form 1099

Copy B, For Recipient

Account Number: UE 02229 KM

Tax Identification Number: 31-0921799

Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)Long-term transactions reported on Form 1099-B - basis reported to the IRS; Report on Form 8949, Part II, with **Box D** checked. (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are reported to the IRS (Box 6b checked)

Activity type	Quantity / face value (Box 1c)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) XYLEM INC CUSIP: 98419M100 Symbol (Box 1d): XYL										
Sell	5 0000		08/18/11	04/16/13	137.27	124.41				12.86
Sell	4 0000		08/25/11	04/16/13	109.82	99.34				10.48
Sub Total	9 0000				247.09	223.75				23.34
Long-term total										
Box D, Part II	21,258.2560				\$318,116.09	\$297,912.80	\$17.67			\$20,220.96

Type of Gain/Loss: Long Term (Box 1c)Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS; Report on Form 8949, Part II, with **Box E** checked

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1c)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) AGILENT TECHNOLOGIES INC CUSIP: 00846U101 Symbol (Box 1d): A										
Sell	42.0000		03/05/09	01/02/13	1,735.65	535.50				1,200.15
Sell	9 0000		03/05/09	09/25/13	467.05	114.75				352.30
Sell	6 0000		07/02/10	09/25/13	311.37	166.07				145.30
Sub Total	57 0000				2,514.07	816.32				1,697.75
Description (Box 8) ALLEGHANY CORP DEL NEW CUSIP: 017175100 Symbol (Box 1d): Y										
Sell	5 0000		03/05/09	09/25/13	2,017.76	731.70				1,286.06

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Copy B, For Recipient

Account Number: UE 02229 KM

Tax Identification Number: 31-0921799

Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)

Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) AMER EXPRESS CO										
					CUSIP: 025816109		Symbol (Box 1d) AXP			
Sell	24 0000		03/05/09	04/02/13	1,614 92	254 12				1,360 80
Sell	30 0000		03/05/09	09/25/13	2,283 66	317 64				1,966 02
Sub Total	54.0000				3,898.58	571 76				3,326 82
Description (Box 8) AMERICAN CENTURY EQUITY MARKET NEUTRAL CL A										
					CUSIP: 02507M758		Symbol (Box 1d) ALIAX			
Sell	2,943 4220		09/01/10	09/25/13	31,641 79	28,580 63				3,061.16
Sell	460 5820		01/19/11	09/25/13	4,951 26	4,555 16				396 10
Sub Total	3,404 0040				36,593.05	33,135 79				3,457.26
Description (Box 8) AMERIPRISE FINANCIAL INC										
					CUSIP: 03076C106		Symbol (Box 1d) AMP			
Sell	13 0000		03/05/09	01/23/13	861 23	187 85				673 38
Sell	5 0000		03/05/09	09/25/13	458 19	72 25				385 94
Sub Total	18 0000				1,319.42	260.10				1,059.32
Description (Box 8) BANK OF NEW YORK MELLON CORP										
					CUSIP: 064058100		Symbol (Box 1d) BK			
Sell	10 0000		06/30/10	04/02/13	279 83	251 20				28 63
Sell	2 0000		07/02/10	04/02/13	55 96	49 02				6 94
Sell	43 0000		07/02/10	09/25/13	1,313 77	1,053 84				259 93
Sell	15,0000		09/01/10	09/25/13	458 29	373 77				84 52
Sell	7 0000		10/07/10	09/25/13	213 87	185 04				28 83
Sub Total	77 0000				2,321.72	1,912.87				408.85

continued next page



UBS Financial Services Inc.

1000 Harbor Boulevard
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Your Financial Advisor:

THE MEDSKER KHALAF GROUP
614-442-6240/800-421-6172

Payer:

THE ENGLISH FAMILY FOUNDATION
ATTN: AMIE ENGLISH BROOKS
500 COMMONS DRIVE
POWELL OH 43065-7117

2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**

Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) BED BATH & BEYOND INC					CUSIP 075896100		Symbol (Box 1d) BBBY			
Sell	20 0000		10/27/09	04/02/13	1,293.37	719.93				573.44
Sell	5 0000		10/27/09	09/25/13	374.41	179.98				194.43
Sell	20 0000		06/30/10	09/25/13	1,497.66	757.17				740.49
Sub Total	45.0000				3,165.44	1,657.08				1,508.36
Description (Box 8) BERKSHIRE HATHAWAY INC NEW CL B					CUSIP 084670702		Symbol (Box 1d) BRK B			
Sell	25.0000		03/05/09	09/25/13	2,893.70	1,157.50				1,736.20
Description (Box 8) BOSTON SCIENTIFIC CORP					CUSIP 101137107		Symbol (Box 1d) BSX			
Sell	35 0000		07/29/10	04/16/13	259.24	197.15				62.09
Sell	23 0000		09/01/10	04/16/13	170.36	119.55				50.81
Sub Total	58 0000				429.60	316.70				112.90
Description (Box 8) CANADIAN NAT RESOURCES LTD CAD					CUSIP 136385101		Symbol (Box 1d) CNQ			
Sell	25 0000		03/05/09	04/02/13	798.73	394.57				404.16
Sell	28 0000		03/05/09	05/03/13	832.74	441.93				390.81
Sell	8 0000		03/05/09	09/25/13	252.88	126.26				126.62
Sell	11 0000		06/30/10	09/25/13	347.70	369.67				(21.97)
Sub Total	72.0000				2,232.05	1,332.43				899.62

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1c)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8): COCA COLA CO COM										
					CUSIP 191216100		Symbol (Box 1d) KO			
Sell	10 0000		03/18/10	04/02/13	407 92	269 25				138 67
Sell	4 0000		05/24/10	04/02/13	163 17	103 15				60 02
Sell	28 0000		05/24/10	09/25/13	1,074 90	722 07				352 83
Sell	3 0000		06/30/10	09/25/13	115 17	75 62				39 55
Sub Total	45 0000				1,761 16	1,170 09				591 07
Description (Box 8): COSTCO WHOLESALE CORP										
					CUSIP 22160K105		Symbol (Box 1d) COST			
Sell	20 0000		03/05/09	04/02/13	2,141 15	787 76				1,353 39
Sell	2 0000		03/05/09	04/19/13	207 99	78 77				129 22
Sell	15 0000		03/05/09	09/25/13	1,737 57	590 82				1,146 75
Sub Total	37 0000				4,086 71	1,457 35				2,629 36
Description (Box 8): CREDIT SUISSE COMMODITY RETURN STRATEGY FUND CLASS A										
					CUSIP 22544R107		Symbol (Box 1d) CRSAX			
Sell	65 8330		03/05/09	04/30/13	500 33	450 96				49 37
Description (Box 8): CVS CAREMARK CORP										
					CUSIP 126650100		Symbol (Box 1d) CVS			
Sell	9 0000		03/19/08	01/23/13	471 62	358 48				113 14
Sell	9 0000		06/06/08	01/23/13	471 62	391 44				80 18
Sell	11 0000		06/06/08	04/17/13	627 72	478 42				149 30
Sell	1 0000		12/29/09	04/17/13	57 07	32 47				24 60

continued next page



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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**

Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked).

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) CVS CAREMARK CORP										
					CUSIP 126650100		Symbol (Box 1d) CVS			
Sell	19.0000		12/29/09	09/25/13	1,101.79	616.98				484.81
Sell	2.0000		01/15/10	09/25/13	115.98	67.73				48.25
Sub Total	51.0000				2,845.80	1,945.52				900.28
Description (Box 8) DEVON ENERGY CORP NEW										
					CUSIP 25179M103		Symbol (Box 1d) DVN			
Sell	41.0000		03/05/09	01/23/13	2,237.32	1,709.95				527.37
Sell	2.0000		03/05/09	04/02/13	110.39	83.41				26.98
Sell	7.0000		02/18/10	04/02/13	386.34	489.05				(102.71)
Sell	2.0000		06/30/10	04/02/13	110.39	123.91				(13.52)
Sell	10.0000		06/30/10	05/03/13	574.98	619.56				(44.58)
Sell	2.0000		07/02/10	05/03/13	114.99	120.73				(5.74)
Sell	23.0000		07/02/10	07/09/13	1,278.13	1,388.44				(110.31)
Sub Total	87.0000				4,812.54	4,535.05				277.49
Description (Box 8) DIAGEO PLC NEW GB SPON ADR										
					CUSIP 25243Q205		Symbol (Box 1d) DEO			
Sell	7.0000		05/29/08	01/23/13	828.57	549.44				279.13
Sell	4.0000		05/29/08	04/02/13	505.31	313.96				191.35
Sell	2.0000		05/29/08	09/25/13	255.58	156.98				98.60
Sell	4.0000		06/04/08	09/25/13	511.15	310.28				200.87
Sub Total	17.0000				2,100.61	1,330.66				769.95

continued next page

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**

Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS; Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) DIAMOND HILL LONG-SHORT FUND CLASS A										
					CUSIP 252645403		Symbol (Box 1d) DIAMX			
Sell	27.8590		03/05/09	04/24/13	551.32	315.92				235.40
Description (Box 8) EOG RESOURCES INC										
					CUSIP 26875P101		Symbol (Box 1d) EOG			
Sell	22.0000		03/05/09	01/23/13	2,752.15	1,141.49				1,610.66
Sell	5.0000		03/05/09	04/02/13	647.64	259.43				388.21
Sell	8.0000		03/05/09	05/09/13	1,099.14	415.09				684.05
Sell	3.0000		02/18/10	05/09/13	412.18	281.97				130.21
Sell	7.0000		02/18/10	09/25/13	1,197.19	657.92				539.27
Sub Total	45.0000				6,108.30	2,755.90				3,352.40
Description (Box 8) EXPEDITORS INTL WASH INC										
					CUSIP 302130109		Symbol (Box 1d) EXPD			
Sell	22.0000		04/14/10	04/16/13	791.97	827.93				(35.96)
Description (Box 8) EXPRESS SCRIPTS HLDG CO										
					CUSIP 30219G108		Symbol (Box 1d) ESRX			
Sell	15.0000		02/18/10	04/02/13	872.44	670.91				201.53
Sell	15.0000		02/18/10	09/25/13	947.38	670.91				276.47
Sell	2.0000		06/30/10	09/25/13	126.32	95.26				31.06
Sub Total	32.0000				1,946.14	1,437.08				509.06
Description (Box 8) GOLDMAN SACHS ABSOLUTE RETURN TRACKER FUND CL A										
					CUSIP 38145N246		Symbol (Box 1d) GARTX			
Sell	61.3990		07/02/10	04/24/13	558.73	537.86				20.87
Sell	3,197.8300		07/02/10	09/25/13	29,899.71	28,012.99				1,886.72

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1c)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) GOLDMAN SACHS ABSOLUTE RETURN TRACKER FUND CL A					CUSIP 38145N246		Symbol (Box 1d) GARTX			
Sell	63 9200		09/01/10	09/25/13	597 65	568 89				28 76
Sell	1,496 6200		11/11/10	09/25/13	13 993 40	13,738 97				254.43
Sell	7 9900		12/09/10	09/25/13	74 71	73 35				1 36
Sell	24 7730		12/09/10	09/25/13	231 62	227 42				4 20
Sell	48 8920		01/19/11	09/25/13	457 14	453 23				3 91
Sell	14 0150		12/08/11	09/25/13	131.05	124 59				6.46
Sell	52 5250		12/08/11	09/25/13	491 10	466 95				24.15
Sub Total	4,967.9640				46,435.11	44,204.25				2,230 86
Description (Box 8) GOOGLE INC CL A					CUSIP 38259P508		Symbol (Box 1d) GOOG			
Sell	1.0000		09/01/10	09/25/13	880 39	462.10				418.29
Description (Box 8) GUGGENHEIM MANAGED FUTURES STRATEGY FUND A					CUSIP 78356A517		Symbol (Box 1d) RYMTX			
Sell	923 7850		10/30/09	09/25/13	19,270 16	24,886 77				(5,616 61)
Sell	92 2860		02/18/10	09/25/13	1,925 08	2,390 22				(465 14)
Sell	613 1920		07/02/10	09/25/13	12,791 19	15,391 12				(2,599 93)
Sell	139 8530		09/01/10	09/25/13	2,917 33	3,362 06				(444 73)
Sub Total	1,769.1160				36,903.76	46,030.17				(9,126.41)
Description (Box 8) HARLEY DAVIDSON INC					CUSIP 412822108		Symbol (Box 1d) HOG			
Sell	23 0000		03/05/09	01/03/13	1,133 63	191 09				942.54
Sell	17.0000		06/30/10	01/03/13	837 91	398 82				439 09

continued next page

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**

Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) HARLEY DAVIDSON INC										
					CUSIP: 412822108		Symbol (Box 1d) HOG			
Sell	30 0000		07/02/10	01/03/13	1,478 65	653 38				825 27
Sell	1 0000		07/02/10	09/25/13	64 20	21 78				42 42
Sub Total	71.0000				3,514.39	1,265.07				2,249 32
Description (Box 8) HEWLETT PACKARD CO										
					CUSIP: 428236103		Symbol (Box 1d) HPQ			
Sell	12 0000		06/30/10	09/25/13	254 57	522 70				(268 13)
Sell	9.0000		07/02/10	09/25/13	190 93	381 04				(190 11)
Sub Total	21.0000				445.50	903.74				(458.24)
Description (Box 8) INVESCO GLOBAL REAL ESTATE FUND CLASS A										
					CUSIP: 00142C367		Symbol (Box 1d) AGREX			
Sell	41 4430		10/30/09	03/05/13	501 87	372 57				129 30
Sell	1,071 8650		10/30/09	09/25/13	12,819 50	9,636 07				3,183 43
Sell	6 3090		12/11/09	09/25/13	75 46	57 85				17 61
Sub Total	1,119.6170				13,396.83	10,066.49				3,330 34
Description (Box 8) IRON MTN INC NEW										
					CUSIP: 462846106		Symbol (Box 1d) IRM			
Sell	55 0000		03/05/09	01/23/13	1,880 75	990 39				890 36
Sell	12 0000		03/05/09	09/25/13	344 11	216 08				128 03
Sell	13 0000		02/18/10	09/25/13	372 79	309 14				63 65
Sell	2 0000		06/30/10	09/25/13	57 35	45 60				11 75
Sub Total	82.0000				2,655 00	1,561 21				1,093 79

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**

Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / Face value (Box 1e)	Original cost basis (f)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) ISHARES TR CORE TOTAL US BOND MKT ETF										
					CUSIP 464287226		Symbol (Box 1d) AGG			
Sell	61 0000		07/02/10	09/25/13	6,533.60	6,517.24				16.36
Description (Box 8) ISHARES TRUST CORE S&P SMALL-CAP ETF										
					CUSIP 464287804		Symbol (Box 1d) UR			
Sell	22 0000		09/01/10	09/25/13	2,187.81	1,206.04				981.77
Sell	360 0000		01/19/11	09/25/13	35,800.48	24,668.28				11,132.20
Sell	77 0000		08/25/11	09/25/13	7,657.33	4,756.29				2,901.04
Sub Total	459 0000				45,645.62	30,630.61				15,015.01
Description (Box 8) LINEAR TECHNOLOGY CORP (DELAWARE)										
					CUSIP 535678106		Symbol (Box 1d) ULTC			
Sell	28 0000		03/06/09	11/04/13	1,138.18	598.02				540.16
Sell	3 0000		09/01/10	11/04/13	121.95	89.01				32.94
Sub Total	31.0000				1,260.13	687.03				573.10
Description (Box 8) LOEWS CORP										
					CUSIP 540424108		Symbol (Box 1d) L			
Sell	51 0000		03/05/09	07/02/13	2,273.23	941.38				1,331.85
Sell	11 0000		02/18/10	07/02/13	490.31	398.75				91.56
Sell	7 0000		02/18/10	09/25/13	330.18	253.75				76.43
Sell	8 0000		06/30/10	09/25/13	377.36	266.88				110.48
Sell	11 0000		07/02/10	09/25/13	518.86	365.62				153.24
Sub Total	88 0000				3,989.94	2,226.38				1,763.56

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Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/loss (\$)
Description (Box 8) MONSANTO CO NEW										
					CUSIP 61166W101		Symbol (Box 1d) MON			
Sell	5 0000		06/30/10	07/24/13	512 01	230 20				281 81
Sell	5 0000		07/02/10	07/24/13	512 01	232 15				279 86
Sub Total	10.0000				1,024 02	462 35				561 67
Description (Box 8) NTHN TRUST CORP										
					CUSIP 665859104		Symbol (Box 1d) NTRS			
Sell	2 0000		09/01/10	11/04/13	113 36	94 60				18 76
Sell	3 0000		09/15/10	11/04/13	170 04	145 64				24 40
Sell	6 0000		09/15/10	11/04/13	339 61	291 27				48 34
Sell	9 0000		11/02/10	11/04/13	509 41	454 84				54 57
Sell	1 0000		11/02/10	11/04/13	56 57	50 54				6 03
Sub Total	21 0000				1,188 99	1,036 89				152 10
Description (Box 8) OCCIDENTAL PETROLEUM CRP										
					CUSIP 674599105		Symbol (Box 1d) OXY			
Sell	32 0000		03/05/09	01/23/13	2 660 42	1,603 79				1,056 63
Sell	2 0000		03/05/09	03/15/13	167 35	100 24				67 11
Sell	30 0000		03/05/09	08/13/13	2,639 84	1,503 55				1,136 29
Sell	4 0000		06/30/10	08/13/13	351 98	316 20				35 78
Sell	1 0000		06/30/10	09/25/13	92 75	79 05				13 70
Sell	11 0000		07/02/10	09/25/13	1,020 29	855 96				184 33
Sub Total	80 0000				6,932 63	4,438 79				2,493 84

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UBS Financial Services Inc.

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Your Financial Advisor:

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614-442-6240/800-421-6172

Payer:

THE ENGLISH FAMILY FOUNDATION
ATTN: AMIE ENGLISH BROOKS
500 COMMONS DRIVE
POWELL OH 43065-7117

2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**

Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) OPPENHEIMER DEVELOPING MARKETS FUND CL A										
										CUSIP 683974109 Symbol (Box 1d) ODMAX
Sell	22 3660		09/01/10	01/30/13	811 22	685 52				125 70
Sell	862 0690		09/01/10	09/25/13	32,146 57	26,422 41				5,724 16
Sub Total	884 4350				32,957 79	27,107 93				5,849 86
Description (Box 8) PFIZER INC										
										CUSIP 717081103 Symbol (Box 1d) PFE
Sell	39 0000		07/02/10	01/04/13	1,012.73	551.40				461.33
Description (Box 8) PHILIP MORRIS INTL INC										
										CUSIP 718172109 Symbol (Box 1d) PM
Sell	10.0000		06/11/08	09/25/13	868.58	502.30				366.28
Description (Box 8) PICO HOLDINGS INC NEW										
										CUSIP 693366205 Symbol (Box 1d) PICO
Sell	19.0000		06/30/10	04/16/13	440 71	571 21				(130.50)
Description (Box 8) PROGRESSIVE CORP OHIO										
										CUSIP 743315103 Symbol (Box 1d) PGR
Sell	25 0000		03/06/09	04/02/13	635 74	253 21				382 53
Sell	58 0000		03/06/09	04/25/13	1,478 81	587 45				891 36
Sell	24.0000		03/06/09	09/25/13	657 40	243 08				414 32
Sell	12 0000		02/18/10	09/25/13	328 70	203.72				124 98
Sell	20 0000		06/30/10	09/25/13	547 83	379 77				168 06
Sell	21 0000		07/02/10	09/25/13	575 23	388 05				187 18
Sub Total	160.0000				4,223.71	2,055.28				2,168 43

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**

Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) QUEST DIAGNOSTICS INC										
					CUSIP 74834L100		Symbol (Box 1d) DGX			
Sell	13.0000		07/29/10	04/16/13	762.95	602.17				160.78
Description (Box 8) SAFEWAY INC										
					CUSIP 786514208		Symbol (Box 1d) SWY			
Sell	10.0000		07/29/10	04/30/13	227.33	204.45				22.88
Sell	5.0000		09/01/10	04/30/13	113.66	96.00				17.66
Sub Total	15.0000				340.99	300.45				40.54
Description (Box 8) SPDR S&P DIVIDEND ETF										
					CUSIP 78464A763		Symbol (Box 1d) SDY			
Sell	1.0000		03/05/09	04/02/13	65.93	27.63				38.30
Sell	1,442.0000		03/05/09	09/25/13	100,065.85	39,831.06				60,234.79
Sub Total	1,443.0000				100,131.78	39,858.69				60,273.09
Description (Box 8) SPDR S&P WORLD EX-US ETF										
					CUSIP 78463X889		Symbol (Box 1d) GWL			
Sell	129.0000		03/05/09	09/25/13	3,632.76	1,780.16				1,852.60
Sell	611.0000		10/30/09	09/25/13	17,206.31	13,927.75				3,278.56
Sell	29.0000		01/07/10	09/25/13	816.67	713.11				103.56
Sell	606.0000		01/19/11	09/25/13	17,065.51	15,994.16				1,071.35
Sell	30.0000		06/30/11	09/25/13	844.83	804.90				39.93
Sub Total	1,405.0000				39,566.08	33,220.08				6,346.00

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POWELL OH 43065-7117

2013 Consolidated Form 1099

Copy B, For Recipient

Account Number: UE 02229 KM

Tax Identification Number: 31-0921799

Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)Long-term transactions reported on Form 1099-B --basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked. (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8): SYMANTEC CORP										
					CUSIP: 871503108		Symbol (Box 1d): SYMC			
Sell	6 0000		07/29/10	09/09/13	152 90	79 34				73 56
Sell	12 0000		07/29/10	09/10/13	304 28	158 66				145 62
Sell	9 0000		07/29/10	09/11/13	227 77	119 00				108 77
Sell	2 0000		09/01/10	09/11/13	50 61	27 97				22 64
Sub Total	29 0000				735 56	384 97				350 59
Description (Box 8): TEXAS INSTRUMENTS										
					CUSIP: 882508104		Symbol (Box 1d): TXN			
Sell	18 0000		03/05/09	04/19/13	617 24	267 80				349 44
Sell	14 0000		03/05/09	09/25/13	565 87	208 30				357 57
Sub Total	32 0000				1,183 11	476 10				707 01
Description (Box 8): THORNBURG INTERNATIONAL VALUE FUND CLASS A										
					CUSIP: 885215657		Symbol (Box 1d): TGVAX			
Sell	21 0310		03/05/09	04/24/13	597 06	321 56				275 50
Description (Box 8): TRANSOCEAN LTD CHF										
					CUSIP: H8817H1G0		Symbol (Box 1d): RIG			
Sell	3 0000		10/29/08	04/16/13	146 51	214 41				(67 90)
Sell	4 0000		03/05/09	04/16/13	195 34	212 00				(16 66)
Sell	5 0000		07/02/10	04/16/13	244 18	236 42				7 76
Sell	5 0000		09/01/10	04/16/13	244 18	267 15				(22 97)
Sub Total	17 0000				830 21	929 98				(99 77)

continued next page

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**

Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS. Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8): UGI CORP NEW										
					CUSIP 902681105		Symbol (Box 1d) UGI			
Sell	27 0000		03/06/09	04/16/13	1 072 67	579 92				.492 75
Sell	3 0000		09/01/10	04/16/13	119 19	84 45				34 74
Sub Total	30 0000				1,191 86	664 37				527 49
Description (Box 8): WELLS FARGO & CO NEW										
					CUSIP 949746101		Symbol (Box 1d) WFC			
Sell	15 0000		03/05/09	04/02/13	554 99	121 91				433 08
Sell	26 0000		03/05/09	08/05/13	1,156 24	211 30				944 94
Sell	31 0000		03/05/09	09/25/13	1 295 78	251 94				1,043 84
Sub Total	72 0000				3,007 01	585 15				2,421 86
Description (Box 8): WESTERN UNION CO										
					CUSIP 959802109		Symbol (Box 1d) WU			
Sell	13 0000		03/18/10	04/16/13	194 13	218 37				(24 24)
Sell	5 0000		07/02/10	04/16/13	74 67	75 09				(0 42)
Sub Total	18 0000				268 80	293 46				(24 66)
Description (Box 8): XYLEM INC										
					CUSIP 98419M100		Symbol (Box 1d) XYL			
Sell	6 0000		01/22/10	04/16/13	164 73	168 28				(3 55)
Sell	11 0000		04/13/10	04/16/13	302 01	342 94				(40 93)

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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax Identification Number: 31-0921799****Proceeds from Broker Transactions Details Reported on Form 1099-B (OMB No. 1545-0715) (continued)**Long-term transactions reported on Form 1099-B - basis **Not** reported to the IRS, Report on Form 8949, Part II, with **Box E** checked (continued)

In this sub-section Date acquired, Cost or Other Basis, and Wash Sale Loss disallowed are not reported to the IRS (Box 6a checked)

Activity type	Quantity / face value (Box 1e)	Original cost basis (\$)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) (\$)	Cost or other basis (Box 3) (\$)	Wash sale loss disallowed (Box 5) (\$)	Federal income tax withheld (Box 4) (\$)	Loss not allowed (Box 2b)	Gain/Loss (\$)
Description (Box 8) XYLEM INC			CUSIP: 98419M100 Symbol (Box 1d) XYL							
Sell	2.0000		07/02/10	04/16/13	54.91	50.83				4.08
Sell	10.0000		07/29/10	04/16/13	274.55	283.40				(8.85)
Sell	10.0000		11/02/10	04/16/13	274.55	266.44				8.11
Sub Total	39.0000				1,070.75	1,111.89				(41.14)
Long-term total										
Box E, Part II	17,272.8590				\$442,885.86	\$318,148.02				\$124,737.84
Total					\$810,479.19					



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2013 Consolidated Form 1099**Copy B, For Recipient****Account Number: UE 02229 KM****Tax identification Number: 31-0921799****2013 Realized Gain/Loss Summary** (Includes sale proceeds not reported on Form 1099-B)

This section summarizes your realized gain/loss for transactions reported on Form 1099-B and those transactions not reported on Form 1099-B.

- Transactions with box A or box D checked were reported to the IRS on Form 1099-B with cost basis
- Transactions with box B or box E checked were reported to the IRS on Form 1099-B without cost basis
- Transactions with box C or box F checked were not reported to the IRS on Form 1099-B

For transactions where term is unknown to UBS, please rely on the confirmations previously provided to you as your official record.

Net gain or loss subtotal and total amounts with symbol (2) do not include tax lots where gain or loss was not calculated.

Description	Sale amount	Cost/other basis	Wash sale loss disallowed	Net Gain/Loss
Short-term Gain/Loss				
Short-term totals with box A checked in Part I	49,477.24	44,458.81		5,018.43
Total short-term	\$49,477.24	\$44,458.81		\$5,018.43
Long-term Gain/Loss				
Long-term totals with box D checked in Part II	318,116.09	297,912.80	17.67	20,220.96
Long-term totals with box E checked in Part II	442,885.86	318,148.02		124,737.84
Total long-term	\$761,001.95	\$616,060.82	\$17.67	\$144,958.80
Sub-Total	\$810,479.19	\$660,519.63	\$17.67	\$149,977.23
Totals	\$810,479.19	\$660,519.63	\$17.67	\$149,977.23

Details for Items Reported on Forms 1099**Dividends and Distributions Details Reported on Form 1099-DIV**

Transactions shown as "Qualified Dividend" only indicate that the dividend is issuer-qualified. We do not compute the holding period required for a qualified dividend. It is the responsibility of the taxpayer to determine whether the holding period requirements have been met. To assist you, we include the ex-dividend date information if available.

Security Description	CUSIP	Activity Description	Ex Date	Payment Date	Amount
ACE LTD CHF	H0023R105	Qualified Foreign Div	07/19/13	08/13/13	6.12
		Qualified Foreign Div	09/26/13	10/21/13	10.71
				Sub-Total	\$ 16.83
AETNA INC	00817Y108	Qualified Dividend	01/08/13	01/25/13	9.40
		Qualified Dividend	04/09/13	04/26/13	9.40
		Qualified Dividend	07/09/13	07/26/13	9.40
		Qualified Dividend	10/08/13	10/25/13	11.00
				Sub-Total	\$ 39.20
AGILENT TECHNOLOGIES INC	00846U101	Qualified Dividend	12/27/12	01/23/13	11.50
		Qualified Dividend	03/28/13	04/24/13	8.76

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ENGLISH FAMILY FOUNDATION
C/O AMIE BROOKS

31-0921799

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
BEXLEY METHODIST CHURCH 2657 E BROAD ST BEXLEY, OH 43209	NONE	PC	OPERATING FUNDS	1,000.
BIG BROTHERS BIG SISTERS OF CENTRAL OHIO 1855 EAST DUBLIN-GRANVILLE RD COLUMBUS, OH 43229	NONE	PC	OPERATING FUNDS	3,500.
CANINE COMPANIONS FOR INDEPENDENCE 4969 STATE ROUTE 37 DELAWARE, OH 43015	NONE	PC	OPERATING FUNDS	9,000.
CAPA 55 EAST STATE STREET COLUMBUS, OH 43215	NONE	PC	OPERATING FUNDS	850.
COLUMBUS SPEECH AND HEARING 510 E. NORTH BROADWAY COLUMBUS, OH 43214	NONE	PC	OPERATING FUNDS	2,000.
COSI 333 WEST BROAD STREET COLUMBUS, OH 43215	NONE	PC	OPERATING FUNDS	32,400.
EASTER SEALS OF CENTRAL OHIO 565 CHILDREN'S DRIVE WEST COLUMBUS, OH 43205	NONE	PC	OPERATING FUNDS	3,000.
GOODWILL COLUMBUS 1331 EDGEHILL ROAD COLUMBUS, OH 43212	NONE	PC	OPERATING FUNDS	500.
GREEN LAWN CEMETARY FOUNDATION 1000 GREEN LAWN AVENUE COLUMBUS, OH 43223	NONE	PC	OPERATING FUNDS	1,000.
HEINZERLING FOUNDATION 1800 HEINZERLING DR. COLUMBUS, OH 43223	NONE	PC	OPERATING FUNDS	2,500.
Total from continuation sheets				77,050.

ENGLISH FAMILY FOUNDATION
C/O AMIE BROOKS

31-0921799

Part XV **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

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
KELTON HOUSE 586 EAST TOWN STREET COLUMBUS, OH 43215	NONE	PC	OPERATING FUNDS	2,000.
LAW ENFORCEMENT FOUNDATION 6277 RIVERSIDE DRIVE DUBLIN, OH 43017	NONE	PC	OPERATING FUNDS	3,000.
LIFE CARE ALLIANCE 1699 W MOUND ST COLUMBUS, OH 43223	NONE	PC	OPERATING FUNDS	2,000.
NEW DIRECTIONS CAREER CENTER 370 S FIFTH ST COLUMBUS, OH 43215	NONE	PC	OPERATING FUNDS	1,000.
PLANNED PARENTHOOD 3255 EAST MAIN STREET COLUMBUS, OH 43213	NONE	PC	OPERATING FUNDS	2,000.
PROMUSICA CHAMBER ORCHESTRA 243 NORTH FIFTH STREET COLUMBUS, OH 43215	NONE	PC	OPERATING FUNDS	2,000.
STRATFORD ECOLOGICAL CENTER 3083 LIBERTY ROAD DELAWARE, OH 43015	NONE	PC	SERVICE GARDEN	1,000.
THE CHILDHOOD LEAGUE CENTER 670 S 18TH ST COLUMBUS, OH 43205	NONE	PC	OPERATING FUNDS	2,000.
THE WOMEN'S FUND OF CENTRAL OHIO 41 S. HIGH STREET, #230 COLUMBUS, OH 43215	NONE	PC	OPERATING FUNDS	2,000.
AMETHYST 455 EAST MOUND STREET COLUMBUS, OH 43215	NONE	PC	OPERATING FUNDS	1,000.
Total from continuation sheets				

31-0921799

3 Grants and Contributions Paid During the Year (Continuation)

323631
05-01-13