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

OMB No. 1545-0052

2013Department of the Treasury
Internal Revenue Service▶ Do not enter Social Security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2013 or tax year beginning , 2013, and ending , 20

Name of foundation Wood-Byer Foundation		A Employer identification number 31-1433019
Number and street for P.O. box number if mail is not delivered to street address 5100 Rollman Estates Dr	Room/suite	B Telephone number (see instructions) (513) 984-9775
City or town, state or province, country, and ZIP or foreign postal code Cincinnati, OH 45236		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☐ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 1,405,018	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) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	30,281	30,281		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	51,325			
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		51,325		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	81,607	81,607			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	4467	4467		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	1182	571		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	3525	1015		
	24 Total operating and administrative expenses. Add lines 13 through 23	9174	6053		
	25 Contributions, gifts, grants paid	65,000			65,000
26 Total expenses and disbursements. Add lines 24 and 25	74,174	6053		65,000	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	7433				
b Net investment income (if negative, enter -0-)		75,554			
c Adjusted net income (if negative, enter -0-)					

914
11

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			40,698	31,870	31,870
	2 Savings and temporary cash investments					
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶					
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7 Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments—U.S. and state government obligations (attach schedule)					
	b Investments—corporate stock (attach schedule)			1,202,154	1,218,415	1,573,148
	c Investments—corporate bonds (attach schedule)					
	11 Investments—land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶					
	12 Investments—mortgage loans					
	13 Investments—other (attach schedule)					
	14 Land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶					
	15 Other assets (describe ▶)					
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)			1,242,852	1,250,285	1,605,018
Liabilities	17 Accounts payable and accrued expenses					
	18 Grants payable					
	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable (attach schedule)					
	22 Other liabilities (describe ▶)					
	23 Total liabilities (add lines 17 through 22)			- 0 -	- 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			1,242,852	1,250,285	
	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					
	28 Paid-in or capital surplus, or land, bldg., and equipment fund					
	29 Retained earnings, accumulated income, endowment, or other funds					
	30 Total net assets or fund balances (see instructions)			1,242,852	1,250,285	
	31 Total liabilities and net assets/fund balances (see instructions)			1,242,852	1,250,285	

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	1,242,852
2 Enter amount from Part I, line 27a	2	7433
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	1,250,285
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,250,285

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 Short-Term (See Attached)	P	Various	Various
b Long-Term (See Attached)	P	Various	Various
c Disallowed Loss (Wash Sale)			
d Capital Gain Distributions			
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 32,153.		30,701.	1452
b 192,220		151,944	40,276
c			116
d			9481
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	51,325
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

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

(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	64,000.	1,287,182	.049721
2011	64,000.	1,287,839	.049696
2010	57,295	1,306,459	.043855
2009	72,583	1,155,539	.062813
2008	74,231	1,442,991	.051443

2 Total of line 1, column (d)	2	.257528
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	.051506
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	1,535,585
5 Multiply line 4 by line 3	5	79,092
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	756
7 Add lines 5 and 6	7	79,848
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	65,000.

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	1511
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	
3 Add lines 1 and 2		3	1511
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	1511
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1372	
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	1372	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	139	
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
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		X
c 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. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		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? <i>If "Yes," attach a conformed copy of the changes.</i>		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? <i>If "Yes," attach the statement required by General Instruction T.</i>		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? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶		
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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	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)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ▶				
14	The books are in care of ▶ <i>Robert A Wood</i>	Telephone no. ▶ <i>(513) 984-9775</i>		
	Located at ▶ <i>5100 Rollman Estates Dr, Cincinnati, OH</i>	ZIP+4 ▶ <i>45236</i>		
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 ▶ <i>15</i>		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

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

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

- 5a** During the year did the foundation pay or incur any amount to:
- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No
- b** If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No
- Organizations relying on a current notice regarding disaster assistance check here ☐ ☒
- c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No
- If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No
- If "Yes" to 6b, file Form 8870.
- 7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No
- b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Attached				

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

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
.....		
None		
Total number of others receiving over \$50,000 for professional services		▶

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	None	
2		
3		
4		

Part IX-B Summary of Program-Related Investments (see instructions)

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

Amount

1		
2	None	
3	All other program-related investments. See instructions.	

Total. Add lines 1 through 3 ▶

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	
b	Average of monthly cash balances	1b	38,753
c	Fair market value of all other assets (see instructions)	1c	1,520,217
d	Total (add lines 1a, b, and c)	1d	1,558,970
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	1,558,970
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	23,385
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,535,585
6	Minimum investment return. Enter 5% of line 5	6	76,779

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	76,779
2a	Tax on investment income for 2013 from Part VI, line 5	2a	1511
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1511
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	75,268
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	75,268
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	75,268

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	65,000
b	Program-related investments—total from Part IX-B	1b	
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	65,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	-0-
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	65,000

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				75,268
2 Undistributed income, if any, as of the end of 2013:				
a Enter amount for 2012 only			62,656	
b Total for prior years: 20____, 20____, 20____		- 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: ▶ \$ <u>65,000</u>				
a Applied to 2012, but not more than line 2a			62,656	
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				2344
e Remaining amount distributed out of corpus	- 0 -			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	- 0 -			- 0 -
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	- 0 -			
b Prior years' undistributed income. Subtract line 4b from line 2b		- 0 -		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		- 0 -		
d Subtract line 6c from line 6b. Taxable amount—see instructions		- 0 -		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount—see instructions			- 0 -	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				72,924
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	- 0 -			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	- 0 -			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	- 0 -			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling ▶

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

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

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

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)**1 Information Regarding Foundation Managers:**

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

None

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

None

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

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

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

- b** The form in which applications should be submitted and information and materials they should include:

- c** Any submission deadlines:

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

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

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

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities					
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e)					
13	Total. Add line 12, columns (b), (d), and (e)					

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

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

[illegible]

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PART I - LINE 16

ADVISOR FEE	4,467
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PART I - LINE 18

FOREIGN TAXES PAID	571
FEDERAL INCOME TAX	611
	1,182

PART I - LINE 23

BANK CHARGES	15
FILING FEES	1,000
ADMINISTRATIVE EXPENSES	2,510
	3,525

WOOD-BYER FOUNDATION
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BOOK FAIR MARKET
VALUE VALUE

PART II - LINE 13(b) AND 13(c)

<u>UNITS</u>	<u>DESCRIPTION</u>		
3,620.000	VANGUARD DEVELOPED MARKET	113,311	150,882
928.000	VANGUARD INDEX FDS MID-CAP GROWTH INDEX	44,931	83,752
985.000	VANGUARD INDEX FDS VANGUARD REIT ETG	43,524	63,592
540.000	VANGUARD INDEX FDS VANGUARD GROWTH	28,796	50,247
2,775.000	VANGUARD INDEX FDS VANGUARD TOTAL STK	154,036	266,178
8,823.933	DFA INTERM EXTENDED QUALITY PORT INSTL	90,822	90,710
9,941.689	DFA SHORT TERM EXTENDED QUAL INSTL	107,630	107,171
12,604.026	DFA INTERNATIONAL VECTOR EQUITY PORT	110,597	149,736
8,575.702	DFA INTL REAL ESTATE SEC PORTFOLIO	42,100	43,050
5,124.458	DFA EMERGING MRKTS CORE EQU PORTF	93,388	99,722
5,110.998	DFA US TARGETED VALUE PRTF INSTL	71,100	116,377
2,716.674	DFA US LARGE CAP VALUE PRTF INSTL	48,085	85,901
14,695.036	DFA FIVE YEAR GLBL FIXED INC PRTF INSTL	163,096	159,294
10,155.947	VANGUARD SHORT TERM BD INDEX SIGNAL	106,997	106,536
		<u>1,218,415</u>	<u>1,573,148</u>



2013 Informational Tax Reporting Statement

WOOD-BYER FOUNDATION

Account No 646-067776 Customer Service 513-792-6848
Recipient ID No 31-1433019 Payer's Fed ID Number 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

2013 Proceeds from Broker and Barter Exchange Transactions*

Short-term transactions

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

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (b)	3 Cost or Other Basis (a)	Gain/Loss (-)	5 Wash Sale Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
DFA EMERGING MKRKT'S CORE EQU PORTF, DFCEX, 233203421									
Sale	12/10/13	12/02/13	205.403	4,010.00	4,048.49	-38.49	27.83		
DFA FIVE YEAR GLBL FIXED INC PRTF INSTL, DFGBX, 233203884									
Sale	12/10/13	12/18/12	145.862	1,619.37	1,626.23	-6.86	2.82		
VANGUARD INDEX FDS VANGUARD REIT ETF FOR, VNQ, 922908553									
Sale	12/10/13	12/02/13	57.000	3,763.53	3,710.81	52.72			
VANGUARD INDEX FDS VANGUARD TOTAL STK MK, VTI, 922908769									
Sale	12/10/13	08/29/13	185.000	17,345.11	15,784.47	1,560.64			
VANGUARD SHORT TERM BD INDEX SIGNAL SHRS, VBSSX, 921937850									
Sale	08/29/13	12/14/12	257.493	2,695.14	2,750.69	-55.55			
Sale	08/29/13	04/25/13	259.887	2,720.20	2,780.00	-59.80			
Subtotals				5,415.34	5,530.69				
TOTALS				32,153.35	30,700.69				0.00
			Short-Term Realized Gain			1,613.36			
			Short-Term Realized Loss			-160.70			
			Wash Sale Loss Disallowed				30.65		

*Our records indicate that you are an exempt recipient for 1099 reporting purposes. This statement provided is based on IRS information reporting requirements for individuals as of the preparation date and is NOT furnished to the IRS. You may be subject to different income tax reporting requirements. Please contact your tax advisor if you have any questions.



2013 Informational Tax Reporting Statement

WOOD-BYER FOUNDATION

Account No 646-067776 Customer Service 513-792-6648
Recipient ID No 31-1433019 Payer's Fed ID Number 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

2013 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions

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

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (b)	3 Cost or Other Basis (a)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld	15 State Tax Withheld
DFA FIVE YEAR GLOBAL FIXED INC PRFT INSTL, DFGBX, 233203884										
Sale	07/17/13	10/14/10	5,369.152	59,309.13	62,672.48	-3,363.35				
Sale	12/10/13	10/14/10	38.244	424.59	446.41	-21.82	21.82			
Sale	12/10/13	09/19/12	343.722	3,816.04	3,880.00	-63.96	63.96			
Subtotals				63,549.76	66,998.89		85.78			
DFA INTERNATIONAL VECTOR EQUITY PORT, DFVQX, 23320G539										
Sale	12/10/13	01/04/12	133.356	1,549.73	1,172.37	377.36				
Sale	12/10/13	10/02/12	555.914	6,460.27	5,190.00	1,270.27				
Subtotals				8,010.00	6,362.37					
DFA US TARGETED VALUE PRFT INSTL, DFFVX, 233203595										
Sale	12/02/13	01/20/10	860.663	20,140.00	11,601.74	8,538.26				
Sale	12/02/13	08/09/11	168.372	3,940.00	2,445.82	1,494.18				
Sale	12/10/13	01/20/10	177.177	4,110.00	2,388.35	1,721.65				
Subtotals				28,190.00	16,435.91					
VANGUARD FTSE DEVELOPED MARKET ETF, VEA, 921943858										
Sale	12/10/13	01/04/12	234.000	9,452.50	7,324.53	2,127.97				
VANGUARD INDEX FDS MIDCAP GROWTH INDEX V, VOT, 922908538										
Sale	11/05/13	01/21/10	274.000	23,904.84	13,392.05	10,512.79				
Sale	12/10/13	01/21/10	39.000	3,425.16	1,906.17	1,518.99				
Subtotals				27,330.00	15,298.22					
VANGUARD INDEX FDS VANGUARD GROWTH VIPER, VUG, 922908736										
Sale	12/10/13	01/21/10	79.000	7,137.47	4,212.78	2,924.69				

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Account No 646-067776 Customer Service: 513-792-6648
 Recipient ID No 31-1433019 Payer's Fed ID Number 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

2013 Proceeds from Broker and Barter Exchange Transactions*

Long-term transactions

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

(a) Cost or other basis provided may include adjustments including, but not limited to, dividend reinvestment, return of capital/principal, wash sale loss disallowed, amortization, accretion, acquisition premium, bond premium, market discount, market premium, and option premium

(b) Gross proceeds less commissions

*Our records indicate that you are an exempt recipient for 1099 reporting purposes. This statement provided is based on IRS information reporting requirements for individuals as of the preparation date and is NOT furnished to the IRS. You may be subject to different income tax reporting requirements. Please contact your tax advisor if you have any questions.

WOOD-BYER FOUNDATION
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PART VIII - LINE 1

<u>NAME AND ADDRESS</u>	<u>TITLE & AVG HRS PER WEEK</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS</u>	
			<u>TO EMPLOYEE BENEFIT PLAN</u>	<u>EXPENSE ACCOUNT</u>
PRISCILLA WOOD-BYER 8380 CAROLINES TRAIL CINCINNATI, OHIO 45242	PRESIDENT, TRUSTEE PART - TIME	0	0	0
ROBERT A. WOOD 5100 ROLLMAN ESTATES DR CINCINNATI, OHIO 45236	SECRETARY, TREASURER, TRUSTEE PART-TIME	0	0	0

WOOD-BYER FOUNDATION
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PART XV - LINE 3(a)

<u>RECIPIENT NAME AND ADDRESS</u>	<u>PURPOSE</u>	<u>AMOUNT</u>
CRAYONS TO COMPUTERS 1350 TENNESSEE AVENUE CINCINNATI, OHIO 45229	GENERAL SUPPORT	\$2,000
CINCINNATI CHAPTER OF HADASSAH 10901 REED HARTMAN HWY, SUITE 117 CINCINNATI, OHIO 45242	GENERAL SUPPORT	\$5,000
MUSCULAR DYSTROPHY ASSOCIATION 1080 NIMITZVIEW DRIVE CINCINNATI, OHIO 45230	MYASTHENIA GRAVIS SUPPORT GROUPS	\$2,000
MAKE-A-WISH FOUNDATION 10260 ALLIANCE ROAD, SUITE 200 CINCINNATI, OHIO 45242	GENERAL SUPPORT	\$1,000
JEWISH FEDERATION OF CINCINNATI 8499 RIDGE ROAD CINCINNATI, OHIO 45236	GENERAL SUPPORT	\$10,000
PURCELL-MARIAN HIGH SCHOOL 2935 HACKBERRY STREET CINCINNATI, OHIO 45206	EDUCATION FUND	\$3,000
THE WELLNESS COMMUNITY 4918 COOPER ROAD CINCINNATI, OHIO 45242	GENERAL SUPPORT	\$5,000
JEWISH FAMILY SERVICES 11223 CORNELL PARK DR CINCINNATI, OHIO 45242	GENERAL SUPPORT	\$3,000
ADATH ISRAEL CONGREGATION 3201 EAST GALBRAITH ROAD CINCINNATI, OHIO 45236	RELIGIOUS SCHOOL GENERAL SUPPORT	\$2,500 \$10,000
HOSPICE OF CINCINNATI 4310 COOPER ROAD CINCINNATI, OHIO 45242	GENERAL SUPPORT	\$2,500
AMERICAN COMMITTEE FOR THE WEIZMANN INSTITUTE OF SCIENCE 6735 TELEGRAPH RD, SUITE 365 BLOOMFIELD HILLS, MI 48301	RESEARCH IN MYASTHENIA GRAVIS	\$2,000
THE CINCINNATI ZOO 3400 VINE STREET		

WOOD-BYER FOUNDATION
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<u>RECIPIENT</u> <u>NAME AND ADDRESS</u>	<u>PURPOSE</u>	<u>AMOUNT</u>
CINCINNATI, OHIO 45220	SUMMER CAMP PROGRAMS	\$1,000
SPRINGER SCHOOL AND CENTER 2121 MADISON ROAD CINCINNATI, OHIO 45208	GENERAL SUPPORT	\$1,000
CHILDREN'S HOSPITAL MEDICAL CENTER 3333 BURNET AVENUE CINCINNATI, OHIO 45229	GENERAL SUPPORT	\$1,000
CEDAR VILLAGE 5467 CEDAR VILLAGE DRIVE MASON, OHIO 45040	GENERAL SUPPORT	\$3,000
SID NETWORK OF OHIO 421 GRAHAM ROAD, SUITE H CUYAHOGA FALLS, OHIO 44221	GENERAL SUPPORT	\$500
AMERICAN CANCER SOCIETY PO BOX 22718 OKLAHOMA CITY, OK 73123	GENERAL SUPPORT	\$500
STELLA MARIS CATHOLIC CHURCH PO BOX 280 SULLIVAN'S ISLAND, SC 29482	GENERAL SUPPORT	\$1,500
COLLEGE OF CHARLESTON COUGAR CLUB 66 GEORGE STREET CHARLESTON, SC 29424-0001	GENERAL SUPPORT	\$2,000
COLLEGE OF CHARLESTON REACH PROGRAM 66 GEORGE STREET CHARLESTON, SC 29292	REACH PROGRAM	\$1,500
BISHOP ENGLAND H.S 363 SEVEN FARMS DRIVE DANIEL ISLAND, SC 29492	GENERAL SUPPORT	\$5,000
		<u>\$65,000</u>