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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2013

Open to Public Inspection

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

Name of foundation HERBERT BEARMAN FOUNDATION		A Employer identification number 31-1602562	
Number and street (or P O box number if mail is not delivered to street address) C/O KATZ ABOSCH 9690 DEERECO ROAD NO 500		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code TIMONIUM, MD 21093		B Telephone number (see instructions) (410) 369-9227	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		C If exemption application is pending, check here ▶ ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ▶ ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐	
I Fair market value of all assets at end of year (<i>from Part II, col. (c), line 16</i>)▶ \$ 37,712,981		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)		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.	876,601	876,601		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,193,372			
	b Gross sales price for all assets on line 6a 18,966,189				
	7 Capital gain net income (from Part IV, line 2) . . .		1,193,372		
	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)				
Operating and Administrative Expenses	11 Other income (attach schedule)	 72,553	72,740		
	12 Total. Add lines 1 through 11	2,142,526	2,142,713		
	13 Compensation of officers, directors, trustees, etc	115,400	0		115,400
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits	20,898	0		20,898
	16a Legal fees (attach schedule)	 617	0		617
	b Accounting fees (attach schedule)	 20,300	0		20,300
	c Other professional fees (attach schedule)	 225,914	180,731		45,183
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	 65,509	18,414		7,095
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy	5,495	0		5,495
	21 Travel, conferences, and meetings	13,925	0		13,925
	22 Printing and publications				
	23 Other expenses (attach schedule)	 13,773	0		13,773
	24 Total operating and administrative expenses. Add lines 13 through 23	481,831	199,145		242,686
	25 Contributions, gifts, grants paid	1,666,502			1,666,502
	26 Total expenses and disbursements. Add lines 24 and 25	2,148,333	199,145		1,909,188
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-5,807			
	b Net investment income (if negative, enter -0-)		1,943,568		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	1,433,218	1,201,201	1,201,201
	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)	0 	3,631,831	2,928,759
	b	Investments—corporate stock (attach schedule)	30,293,782 	24,124,346	28,648,175
	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)	725,046 	3,696,379	4,934,846
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	32,452,046	32,653,757	37,712,981
	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)			
Net Assets or Fund Balances	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
		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	34,063,400	34,270,918	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	-1,611,354	-1,617,161	
	30	Total net assets or fund balances (see page 17 of the instructions)	32,452,046	32,653,757	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	32,452,046	32,653,757	

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	32,452,046
2	Enter amount from Part I, line 27a	2	-5,807
3	Other increases not included in line 2 (itemize) ▶ _____ 	3	207,518
4	Add lines 1, 2, and 3	4	32,653,757
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	32,653,757

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)
1 a	PUBLICLY TRADED SECURITIES	P		
b	CMS PLATINUM FUND	P		
c	WELLS FARGO K-1'S	P		
d	FSP 505 WATERFORD CORP	P		
e	CAPITAL GAINS DIVIDENDS	P		

(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 18,767,528		17,734,010	1,033,518
b 54,498			54,498
c 20,222			20,222
d 35,130		38,807	-3,677
e 88,811			88,811

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			1,033,518
b			54,498
c			20,222
d			-3,677
e			88,811

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	1,193,372
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	1,337,600	32,582,743	0 041052
2011	1,790,473	34,157,794	0 052418
2010	1,682,655	33,320,213	0 050500
2009	1,918,783	31,401,957	0 061104
2008	2,005,779	38,050,990	0 052713

2 Total of line 1, column (d).	2	0 257787
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 051557
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	35,850,100
5 Multiply line 4 by line 3.	5	1,848,324
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	19,436
7 Add lines 5 and 6.	7	1,867,760
8 Enter qualifying distributions from Part XII, line 4.	8	1,909,188

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

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		119,436	
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-)		20	
3		Add lines 1 and 2.		319,436	
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		40	
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		519,436	
6		Credits/Payments			
a		2013 estimated tax payments and 2012 overpayment credited to 2013	6a	45,461	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c	5,000	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments. Add lines 6a through 6d.		750,461	
8		Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		1031,025	
11		Enter the amount of line 10 to be Credited to 2014 estimated tax ☒ 31,025 Refunded ☒		110	

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? 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.	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☒ \$ 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.	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		No
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions): ☒ MD			
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 .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶WWW HERBERTBEARMANFOUNDATION ORG				
14	The books are in care of ▶SHELDON BEARMAN Telephone no ▶(410) 369-9227			
Located at ▶7546 HAWKS LANDING DRIVE WEST PALM BEACH FL ZIP +4 ▶33412				
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		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?.	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?. ☐ Yes ☒ No			
If "Yes," list the years ▶ 20____, 20____, 20____, 20____				
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 ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

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

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

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SHELDON BEARMAN	PRESIDENT &	0	0	0
7546 HAWKS LANDING DRIVE	TREASURER			
WEST PALM BEACH,FL 33412	20 00			
ARLENE BEARMAN	VICE PRESIDENT &	0	0	0
7546 HAWKS LANDING DRIVE	SECRETARY			
WEST PALM BEACH,FL 33412	15 00			
MARK BEARMAN	CHIEF OPERATING	115,400	7,665	13,233
3003 MASTERS DRIVE	OFFICER			
BALTIMORE,MD 21209	40 00			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3	0

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	35,078,832
b	Average of monthly cash balances.	1b	1,317,209
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	36,396,041
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	36,396,041
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	545,941
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	35,850,100
6	Minimum investment return. Enter 5% of line 5.	6	1,792,505

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	1,792,505
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	19,436
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	19,436
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,773,069
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,773,069
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	1,773,069

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	1,909,188
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	1,909,188
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	19,436
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,889,752
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				1,773,069
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			1,565,134	
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 ▶ \$ 1,909,188				
a Applied to 2012, but not more than line 2a			1,565,134	
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.				344,054
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				1,429,015
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 XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

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

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

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

a

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

SHELDON BEARMAN
10525 TERRA LAGO DRIVE
WEST PALM BEACH,FL 33412
(410) 369-9227

b

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

NO SPECIFIC FORMAT

c

Any submission deadlines

NONE

d

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

NONE

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	1,666,502
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Part XVII

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

1

Cash.

1a(1)

No

2

Other assets.

1a(2)

No

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

1b(1)

No

2

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

3

Rental of facilities, equipment, or other assets.

1b(3)

No

4

Reimbursement arrangements.

1b(4)

No

5

Loans or loan guarantees.

1b(5)

No

6

Performance of services or membership or fundraising solicitations.

1b(6)

No

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

d

If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐

Yes

☒

No

b

If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

2014-10-30

Date

Title

May the IRS discuss this return with the preparer shown below (see instr.)?

☒

Yes

☐

No

Paid Preparer Use Only

Print/Type preparer's name MICHAEL J AGETSTEIN CPA PFS	Preparer's Signature	Date 2014-10-30	Check if self-employed ☐	PTIN P00087380	
Firm's name	KATZ ABOSCH			Firm's EIN	52-1003788
Firm's address	9690 DEERECO RD STE 500 TIMONIUM, MD 21093			Phone no	(410) 828-6432

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN DIABETES ASSOCIATION 2002 CLIPPER PARK RD BALTIMORE,MD 21211	NONE	501(C)(3)	GENERAL PURPOSE	250
AMERICAN FRIENDS OF KEREN MALKI 736 GRANGE ROAD TEANECK,NJ 07666	NONE	501(C)(3)	EQUIPMENT FUNDING	18,150
AMERICAN FRIENDS OF KESHET EILON 25 TRININTY PASS POUND RIDGE,NY 10576	NONE	501(C)(3)	GENERAL PURPOSE	1,000
AMERICAN FRIENDS OF MEIR PENIM 5316 NEW UTRECHT AVENUE BROOKLYN,NY 11219	NONE	501(C)(3)	GENERAL PURPOSES	25,000
AMERICAN FRIENDS OF NGO MONITOR INC 922 ROCKBORN ST GAITHERSBURG,MD 20787	NONE	501(C)(3)	GENERAL PURPOSE	10,000
AMERICAN ISRAEL ED FDN 2554 H STREET NW WASHINGTON,DC 20001	NONE	501(C)(3)	GENERAL PURPOSE	25,000
ARTISTS FOR AMY 348 THOMPSON CREEK MALL SUITE 314 STEVENSVILLE,MD 21666	NONE	501(C)(3)	MAY CONCERT SUPPORT	7,600
ASSOCIATED JEWISH CHARITIES 101 WEST MOUNT ROYAL AVENUE BALTIMORE,MD 21201	NONE	501(C)(3)	HERBERT BEARMAN PHILANTHROPIC FUND	150,000
ASSOCIATED JEWISH CHARITIES 101 WEST MOUNT ROYAL AVENUE BALTIMORE,MD 21201	NONE	501(C)(3)	ANNUAL CAMPAIGN	85,000
ASSOCIATED JEWISH CHARITIES 101 WEST MOUNT ROYAL AVENUE BALTIMORE,MD 21201	NONE	501(C)(3)	ASHKELON KREMBO WINGS	20,000
ASSOCIATED JEWISH CHARITIES 101 WEST MOUNT ROYAL AVENUE BALTIMORE,MD 21201	NONE	501(C)(3)	GENERAL PURPOSES	15,000
ASSOCIATED JEWISH CHARITIES 101 WEST MOUNT ROYAL AVENUE BALTIMORE,MD 21201	NONE	501(C)(3)	WOMENS GIVING FOUNDATION	1,100
ASSOCIATED JEWISH CHARITIES 101 WEST MOUNT ROYAL AVENUE BALTIMORE,MD 21201	NONE	501(C)(3)	ISREAL LUNCHEON	1,175
ASSOCIATED JEWISH CHARITIES 101 WEST MOUNT ROYAL AVENUE BALTIMORE,MD 21201	NONE	501(C)(3)	FUNDING FOR ASHKELON	5,828
ASSOCIATED JEWISH CHARITIES 101 WEST MOUNT ROYAL AVENUE BALTIMORE,MD 21201	NONE	501(C)(3)	JAFI MASA PROGRAM	25,000
Total  3a				1,666,502

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ASSOCIATION OF BALTIMORE AREA GRANT MAKERS 2 EAST READ STREET 2ND FLOOR BALTIMORE,MD 21202	NONE	501(C)(3)	GENERAL PURPOSES	4,500
ASSOCIATION OF SMALL FOUNDATIONS 1720 N STREET NW WASHINGTON,DC 20036	NONE	501(C)(3)	ANNUAL SUPPORT	725
ATHLETES SERVING ATHLETE PO BOX 4222 LUTHERVILLE,MD 21094	NONE	501(C)(3)	GENERAL PURPOSE	5,000
AUTISM PROJECT OF PALM BEACH COUNTY 5800 CORPORATE WAY WEST PALM BEACH,FL 33407	NONE	501(C)(3)	CAREER TRANSITION PROGRAM	25,000
BALTIMORE ANIMAL RESCUE AND CARE SHELTER INC 301 STOCKHOLM STREET BALTIMORE,MD 21230	NONE	501(C)(3)	SPAY/NEUTER SURGICAL EQUIPMENT	1,000
BALTIMORE CHILD ABUSE CENTER 2300 N CHARLES ST BALTIMORE,MD 21218	NONE	501(C)(3)	GENERAL PURPOSE	18,500
BALTIMORE COMMUNITY FOUNDATION 2 EAST READ STREET BALTIMORE,MD 21202	NONE	501(C)(3)	BALTIMORE WOMEN'S GIVING	1,100
BALTIMORE HEBREW CONGREGATION 7401 PARK HEIGHTS AVE BALTIMORE,MD 21208	NONE	501(C)(3)	ROSH HASHANNA UNDER THE STARS	10,000
BALTIMORE SCHOOL FOR THE ARTS 712 CATHEDRAL STREET BALTIMORE,MD 21201	NONE	501(C)(3)	AFTER SCHOOL PROGRAMS	10,000
BALTIMORE SYMPHONY ORCHESTRA 1212 CATHEDRAL ST BALTIMORE,MD 21201	NONE	501(C)(3)	ORCHKIDS PROGRAM	15,000
BETH EL CONGREGATION 8101 PARK HEIGHTS AVE PIKESVILLE,MD 21208	NONE	501(C)(3)	GENERAL PURPOSE	11,750
BRIDGES AT SAINT PAUL'S SCHOOL 11152 FALLS RD BROOKLANDVILLE,MD 21022	NONE	501(C)(3)	HIGH SCHOOL PROGRAM	9,000
BZD (BALTIMORE ZIONIST DISTRICT) 104 CHURCH LAND SUITE 130 BALTIMORE,MD 21208	NONE	501(C)(3)	GENERAL PURPOSE	350
CAPITAL CAMPS 11300 ROCKVILLE PIKE STE 407 ROCKVILLE,MD 20852	NONE	501(C)(3)	PEN PAL SPONSORSHIP	500
CHAI 5809 PARK HEIGHTS AVENUE BALTIMORE,MD 21215	NONE	501(C)(3)	AMERICORPS PUBLIC ALLIES PROGRAM	82,000
Total  3a				1,666,502

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CHANA 101 WEST MOUNT ROYAL AVENUE BALTIMORE,MD 21201	NONE	501(C)(3)	PROFESSIONAL DEVELOPMENT FOR THERAPISTS	5,000
CHANGE INC 115 STONER AVENUE WESTMINSTER,MD 21157	NONE	501(C)(3)	AQUATIC THERAPY	1,500
CONCERT ARTISTS OF BALTIMORE 1114 ST PAUL STREET BALTIMORE,MD 21202	NONE	501(C)(3)	SUPPORT OF THE LYRIC EVENT	7,500
CRISIO REY JESUIT HIGH SCHOOL 420 S CHESTER ST BALTIMORE,MD 21230	NONE	501(C)(3)	GENERAL PURPOSE	25,000
CYSTIC FIBROSIS FOUNDATION OF MARYLAND 6931 ARLINGTON RD 2ND FL BETHESDA,MD 20814	NONE	501(C)(3)	GREAT STRIDES SPONSORSHIP	35,200
DYSLEXIA TUTORING PROGRAM 1211 N WESTSHORE BLVD SUITE 314 TAMPA,FL 33607	NONE	501(C)(3)	2011 DTP SUMMER CAMP	10,000
FOUNDATION FOR THE DEFENSE OF DEMOCRACIES PO BOX 14425 33249 WASHINGTON,DC 20033	NONE	501(C)(3)	UNRESTRICTED	10,000
FRIENDS OF AKIM USA 25 W 45TH ST 1405 NEW YORK,NY 10036	NONE	501(C)(3)	GENERAL PURPOSE	25,000
FRIENDS OF ISRAEL SPORTS CENTER FOR THE DISABLED PO BOX 667 DEERFIELD,IL 60015	NONE	501(C)(3)	PURCHASE OF WHEEL CHAIRS	10,000
FRIENDS OF THE ISRAEL DEFENSE FORCES 1430 BROADWAY NEW YORK,NY 10018	NONE	501(C)(3)	GENERAL PURPOSES	10,000
FUND FOR EDUCATIONAL EXCELLENCE 800 NORTH CHARLES ST SUITE 400 BALTIMORE,MD 21201	NONE	501(C)(3)	GENERAL PURPOSE	15,000
GIFT OF LIFE 401 N 3RD ST PHILADELPHIA,PA 19103	NONE	501(C)(3)	GENERAL PURPOSE	1,800
GREEN VALLEY NORTH TURKEY TROT 12109 RIDGE VALLEY DRIVE OWINGS MILLS,MD 21117	NONE	501(C)(3)	CHROHN'S AND COLITIS RESEARCH	100
HANDS ACROSS AMERICA 16 WALLY COURT LUTHERVILLE,MD 21093	NONE	501(C)(3)	2012 PERU MEDICAL MISSION	10,000
HEALTH CARE FOR THE HOMELESS 421 FALLSWAY BALTIMORE,MD 21202	NONE	501(C)(3)	CENTRICITY UPGRADE	15,000
Total  3a				1,666,502

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
HELPING UP MISSION 1029 E BALTIMORE ST BALTIMORE,MD 21202	NONE	501(C)(3)	GENERAL PURPOSE	15,480
HELPUADOPTORG PO BOX 787 NEW YORK,NY 10150	NONE	501(C)(3)	GENERAL PURPOSE	5,000
IBIS CANCER RESEARCH UNIT 8057 CRANES POINTE WAY WEST PALM BEACH,FL 33412	NONE	501(C)(3)	SPONSORSHIP FOR DISEASE RELATED ILLNESSES	1,000
INCENTIVE MENTORING PROGRAM PO BOX 1584 BALTIMORE,MD 21203	NONE	501(C)(3)	GENERAL PURPOSES	10,000
INTERNATIONAL RESCUE COMMITTEE 122 E 42ND STREET NEW YORK,NY 10168	NONE	501(C)(3)	SUPPORT YOUTH CASE WORKERS	2,500
ISRAEL GUIDE DOG CENTER FOR THE BLIND 968 EASTON ROAD SUITE H WARRINGTON,PA 18976	NONE	501(C)(3)	GENERAL PURPOSES	10,000
JEWISH CARING NETWORK 529 N WASHINGTON ST BALTIMORE,MD 21205	NONE	501(C)(3)	GENERAL PURPOSE	500
JEWISH COMMUNITY CENTER OF GREATER BALTIMORE 5700 PARK HEIGHTS AVENUE BALTIMORE,MD 21215	NONE	501(C)(3)	INTERACTIVE WEBSITE	15,000
JEWISH COMMUNITY CENTER OF GREATER WASHINGTON 6125 MONTROSE RD ROCKVILLE,MD 20852	NONE	501(C)(3)	GENERAL PURPOSE	25,000
JEWISH COMMUNITY CENTER 3506 GWYNNBROOK AVE OWINGS MILLS,MD 21117	NONE	501(C)(3)	GENERAL PURPOSE	10,250
JEWISH COMMUNITY SERVICES 5750 PARK HEIGHTS AVENUE BALTIMORE,MD 21215	NONE	501(C)(3)	PSYCHOLOGICAL TESTING EQUIPMENT	25,940
JEWISH FEDERATION OF PALM BEACH CO 4601 COMMUNITY DRIVE WEST PALM BEACH,FL 33417	NONE	501(C)(3)	ISRAEL AT 65 SPONSORSHIP	55,500
JEWISH MUSEUM OF MARYLAND 15 LLOYD ST BALTIMORE,MD 21202	NONE	501(C)(3)	TRAVELING "CHOSEN FOOD"	75,150
JEWISH NATIONAL FUND 42 EAST 69TH STREET NEW YORK,NY 10021	NONE	501(C)(3)	PURCHASE OF 2 JAWS OF LIFE	25,000
JEWISH WOMEN FOUNDATION 4601 COMMUNITY DRIVE WEST PALM BEACH,FL 33417	NONE	501(C)(3)	GENERAL PURPOSES	2,000
Total  3a				1,666,502

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
JOHNS HOPKINS CHILDRENS CENTER 1800 ORLEANS STREET BALTIMORE,MD 21287	NONE	501(C)(3)	HADASSAH/JHU CYSTIC FIBROSIS COLLABORATIVE PROJECT	53,200
JOHNS HOPKINS UNIVERSITY 3400 N CHARLES STREET BALTIMORE,MD 21218	NONE	501(C)(3)	BEARMAN LECTURESHIP	9,000
JR ACHIEVEMENT OF CENTRAL MARYLAND 10711 RED RUN BLVD OWINGS MILLS,MD 21117	NONE	501(C)(3)	GENERAL PURPOSE	20,000
KARINA ASSOCIATION PO BOX 1383 COCKEYSVILLE,MD 21030	NONE	501(C)(3)	GENERAL PURPOSE	10,000
KIDSANCTUARY CAMPUS 700 SOUTH DIXIE HIGHWAY SUITE 101 WEST PALM BEACH,FL 33401	NONE	501(C)(3)	GENERAL PURPOSE	625
LIVING CLASSROOMS FOUNDATION 1417 THAMES STREET BALTIMORE,MD 21231	NONE	501(C)(3)	GENERAL PURPOSES	35,000
LUPUS MN OF AMERICA 3800 SMRTIVSN BOULEVARD EAST BLOOMINGTON,MN 55425	NONE	501(C)(3)	GENERAL PURPOSE	100
LYNN UNIVERSITY 3601 N MILITARY TRAIL BOCA RATON,FL 33431	NONE	501(C)(3)	GENERAL PURPOSE	2,500
LYRIC OPERA OF BALTIMORE 110 W MT ROYAL AVE BALTIMORE,MD 21201	NONE	501(C)(3)	STUDENT OUTREACH PROGRAM	2,500
MARYLAND RAVENS INC 1413 GLENDALE RD BALTIMORE,MD 21239	NONE	501(C)(3)	ABILITIES AWARENESS PROJECT	500
MARYLAND SCHOOL FOR THE BLIND 3501 TAYLOR AVENUE BALTIMORE,MD 21236	NONE	501(C)(3)	ASSISTIVE TECHNOLOGY	26,077
MCCARTHY'S WILDLIFE SANCUARY 12943 61ST ST N WEST PALM BEACH,FL 33412	NONE	501(C)(3)	GENERAL PURPOSE	500
MED ALUMNI ASSOCIATION OF UNIVERSITY OF MARYLAND 522 W LOMBARD ST BALTIMORE,MD 21201	NONE	501(C)(3)	GENERAL PURPOSE	1,000
MIDDLE EAST MEDIA RESEARCH INSTITUTE PO BOX 27837 WASHINGTON,DC 20038	NONE	501(C)(3)	GENERAL PURPOSES	10,000
MISFITS ANIMAL SANCUTARY PO BOX 75 FINKSBURG,MD 21048	NONE	501(C)(3)	CONSTRUCTION OF ANIMAL HOLDING PENS	1,000
Total  3a				1,666,502

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MUTTS MATTER RESCUE PO BOX 2047 ROCKVILLE,MD 20847	NONE	501(C)(3)	GENERAL PURPOSE	1,000
NATIONAL AQUARIUM-BALTIMORE 501 EAST PRATT STREET BALTIMORE,MD 21202	NONE	501(C)(3)	THERMOGRAPH PURCHASE	21,596
OPERATION WARM 1653 BRINTONS BRIDGE ROAD CHADDS FORD,PA 19317	NONE	501(C)(3)	BALTIMORE COAT PROGRAM	2,500
PEF ISRAEL ENDOWMENT FUNDS INC 317 MADISON AVENUE NEWYORK,NY 10017	NONE	501(C)(3)	MATAN-INVESTING IN THE COMMUNITY	12,000
PALM BEACH COUNTY FOOD BANK 525 GATOR DR LANTANA,FL 33462	NONE	501(C)(3)	GENERAL PURPOSE	50
PAUL'S PLACE INC 1118 WARD ST BALTIMORE,MD 21230	NONE	501(C)(3)	GENERAL PURPOSE	15,000
PUBLIC JUSTICE CENTER 1 N CHARLES ST 200 BALTIMORE,MD 21201	NONE	501(C)(3)	GENERAL PURPOSE	10,000
QUANTUM HOUSE 901 45TH STREET WEST PALM BEACH,FL 33407	NONE	501(C)(3)	GENERAL PURPOSES	12,550
SAINT BARNABAS MEDICAL CENTER 94 OLD SHART HILLS ROAD LIVINGSTON,NJ 07039	NONE	501(C)(3)	GENERAL PURPOSE	100
SEAGULL INDUSTRIES FOR THE DISABLED 3879 WEST INDUSTRIAL WAY WEST PALM BEACH,FL 33404	NONE	501(C)(3)	FURNISHING NEW CHARTER SCHOOL	15,000
SHEPPARD AND ENOCH PRATT HOSPITAL 6501 NORTH CHARLES ST BALTIMORE,MD 21285	NONE	501(C)(3)	VIDEO MODELING EQUIPMENT AND COMMUNICATIONS TECHNOLOGY	20,000
SOUTH BALTIMORE LEARNING 28 E OSTEND ST BALTIMORE,MD 21230	NONE	501(C)(3)	GENERAL PURPOSE	4,582
SPECIAL OLYMPICS FLORIDA 1915 DON WICKHAM DRIVE CLERMONT,FL 34711	NONE	501(C)(3)	POLAR PLUNGE	250
ST ELIZABETH SCHOOL 801 ARGONNE DR BALTIMORE,MD 21218	NONE	501(C)(3)	GENERAL PURPOSE	14,727
TEACH FOR AMERICA 315 W 35TH ST 7TH FL NEWYORK,NY 10018	NONE	501(C)(3)	GENERAL PURPOSES	10,000
Total  3a				1,666,502

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
TEMPLE OHEB SHALOM OHEB SHALOM TEMPLE BALTIMORE,MD 21208	NONE	501(C)(3)	GENERAL PURPOSE	10,000
THE DAVID PROJECT PO BOX 52390 BOSTON,MA 02205	NONE	501(C)(3)	VIDEO ADVOCACY TRAINING	20,000
THE ISRAEL PROJECT 2020 K ST NW STE 7600 WASHINGTON,DC 20006	NONE	501(C)(3)	TRIBUTE AD	200,000
THE LUSTGARTEN FOUNDATION 1111 STEWARD AVE BETHPAGE,NY 11714	NONE	501(C)(3)	GENERAL PURPOSE	180
TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA 1 COLLEGE HALL PHILADELPHIA,PA 19104	NONE	501(C)(3)	GENERAL PURPOSE	5,000
UMMS FOUNDATION SHOCK TRAMA 22 S GREENE ST BALTIMORE,MD 21201	NONE	501(C)(3)	GENERAL PURPOSE	950
UNITED SYNOGOGUE OF CONSERVATIVE JUDAISM 820 SECOND AVE 10TH FLOOR NEWYORK,NY 10017	NONE	501(C)(3)	GENERAL PURPOSE	1,000
UNIVERSITY OF MARYLAND BALTIMORE COUNTY FOUNDATION 1000 HILLTOP CIRCLE BALTIMORE,MD 21250	NONE	501(C)(3)	HROBOWSKI FUND FOR INNOVATION	25,000
VALLEY VIEW SCHOOL PO BOX 338 NORTH BROOKFIELD,MA 01535	NONE	501(C)(3)	TECHNOLOGY NEEDS	19,067
VILLAGE LEARNING PLACE 2521 SAINT PAUL STREET BALTIMORE,MD 21218	NONE	501(C)(3)	LINK AFTER SCHOOL AND SUMMER PROGRAMS	5,000
WORLD UNION FOR PROGRESSIVE JUDAISM 633 THIRD AVE 6TH FLOOR NEWYORK,NY 10017	NONE	501(C)(3)	GENERAL PURPOSE	10,000
WOUNDED WARRIORS OF SOUTHERN MARYLAND 16900 SCIENCE DR BOWIE,MD 20715	NONE	501(C)(3)	GENERAL PURPOSE	15,000
Total ▶ 3a				1,666,502

TY 2013 Accounting Fees Schedule

Name: HERBERT BEARMAN FOUNDATION

EIN: 31-1602562

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	20,300	0		20,300

**TY 2013 Investments Corporate
Stock Schedule**

Name: HERBERT BEARMAN FOUNDATION
EIN: 31-1602562

Name of Stock	End of Year Book Value	End of Year Fair Market Value
WELLS FARGO INVESTMENTS - SECURITIES	24,124,346	28,648,175

TY 2013 Investments Government Obligations Schedule

Name: HERBERT BEARMAN FOUNDATION

EIN: 31-1602562

**US Government Securities - End of
Year Book Value:**

3,631,831

**US Government Securities - End of
Year Fair Market Value:**

2,928,759

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2013 Investments - Other Schedule**Name:** HERBERT BEARMAN FOUNDATION**EIN:** 31-1602562

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
WELLS FARGO INVESTMENTS - INVESTMENT IN PARTNERSHIPS	AT COST	2,970,000	4,124,485
CMS PLATINUM FUND	AT COST	651,018	651,018
FSP INVESTMENTS	AT COST	75,361	159,343

TY 2013 Legal Fees Schedule

Name: HERBERT BEARMAN FOUNDATION

EIN: 31-1602562

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	617	0		617

TY 2013 Other Expenses Schedule**Name:** HERBERT BEARMAN FOUNDATION**EIN:** 31-1602562

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE	6,812	0		6,812
DUES AND SUBSCRIPTIONS	275	0		275
INSURANCE	3,532	0		3,532
COMPUTER EXPENSE	3,154	0		3,154

TY 2013 Other Income Schedule

Name: HERBERT BEARMAN FOUNDATION

EIN: 31-1602562

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
K-1 INVESTMENT INCOME	72,553	72,740	72,553

TY 2013 Other Increases Schedule

Name: HERBERT BEARMAN FOUNDATION

EIN: 31-1602562

Description	Amount
EXCESS FMV OVER COST BASIS	207,518

TY 2013 Other Professional Fees Schedule

Name: HERBERT BEARMAN FOUNDATION

EIN: 31-1602562

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	225,914	180,731		45,183

TY 2013 Taxes Schedule**Name:** HERBERT BEARMAN FOUNDATION**EIN:** 31-1602562

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL	7,095	0		7,095
FOREIGN	18,414	18,414		0
FEDERAL TAXES	40,000	0		0