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Return of Private Foundation

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

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

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation

ALEX G. NASON FOUNDATION INC.

Number and street (or P O box number if mail is not delivered to street address)

1177 HIGH RIDGE ROAD

Room/suite

111

City or town, state or province, country, and ZIP or foreign postal code

STAMFORD, CT 06905

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end of year

(from Part II, col (c), line 16)

\$ 5,008,298.

J Accounting method:

☐ Cash☒ Accrual☐ Other (specify)

(Part I, column (d) must be on cash basis)

A Employer identification number

34-1757149

B Telephone number

(203) 856-5299

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received			N/A	
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	74,628.	74,628.		STATEMENT 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	101,215.			
b	Gross sales price for all assets on line 6a	45,356,612.			
7	Capital gain net income (from Part IV, line 2)		101,215.		
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 (loss)				
11	Other income	-65,110.	-65,110.		STATEMENT 2
12	Total. Add lines 1 through 11	110,733.	110,733.		
13	Compensation of officers, directors, trustees, etc.	162,875.	81,437.		81,438.
14	Other employee salaries and wages				
15	Pension plans, employee benefits	73,294.	36,647.		36,647.
16a	Legal fees				
b	Accounting fees	26,924.	13,462.		13,462.
c	Other professional fees	60.	30.		30.
17	Interest				
18	Taxes	12,811.	7,906.		4,905.
19	Depreciation and depletion	201.	101.		
20	Occupancy	17,478.	8,739.		8,739.
21	Travel, conferences, and meetings	7,419.	3,709.		3,710.
22	Printing and publications				
23	Other expenses	19,907.	14,512.		5,395.
24	Total operating and administrative expenses. Add lines 13 through 23	320,969.	166,543.		154,326.
25	Contributions, gifts, grants paid	238,250.			238,250.
26	Total expenses and disbursements. Add lines 24 and 25	559,219.	166,543.		392,576.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	-448,486.			
b	Net investment income (if negative, enter -0-)		0.		
c	Adjusted net income (if negative, enter -0-)			N/A	

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	23,664.	17,858.	17,858.
	2 Savings and temporary cash investments	196,894.	1,415,872.	1,415,872.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	21,825.	21,825.	21,825.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 8	5,384,715.	3,771,873.	3,541,497.
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis ▶		
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶ 6,069.				
Less: accumulated depreciation STMT 7 ▶ 5,968.		302.	101.	101.
15 Other assets (describe ▶ STATEMENT 9)		0.	11,145.	11,145.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)		5,627,400.	5,238,674.	5,008,298.
17 Accounts payable and accrued expenses				
18 Grants payable				
19 Deferred revenue				
20 Loans from officers, directors, trustees, and other disqualified persons				
21 Mortgages and other notes payable				
22 Other liabilities (describe ▶)				
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input checked="" type="checkbox"/>			
	24 Unrestricted	5,627,400.	5,238,674.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input type="checkbox"/>			
	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	5,627,400.	5,238,674.		
31 Total liabilities and net assets/fund balances	5,627,400.	5,238,674.		

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	5,627,400.
2 Enter amount from Part I, line 27a	2	-448,486.
3 Other increases not included in line 2 (itemize) ▶ UNREALIZED GAIN	3	59,760.
4 Add lines 1, 2, and 3	4	5,238,674.
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	5,238,674.

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 PUBLICLY TRADED SECURITIES		P		
b PUBLICLY TRADED SECURITIES		P		
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 44,424,059.		44,583,257.	-159,198.
b 932,553.		672,140.	260,413.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-159,198.
b			260,413.
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	101,215.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 }		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	423,396.	5,575,017.	.075945
2011	450,699.	6,727,393.	.066995
2010	457,540.	7,689,082.	.059505
2009	135,559.	8,303,231.	.016326
2008	594,825.	9,577,358.	.062107

2 Total of line 1, column (d)	2	.280878
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	.056176
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	5,123,218.
5 Multiply line 4 by line 3	5	287,802.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	0.
7 Add lines 5 and 6	7	287,802.
8 Enter qualifying distributions from Part XII, line 4	8	392,576.

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 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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	0.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	0.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a 21,825.		
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	21,825.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		8	
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	21,825.
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax	21,825. Refunded	11	0.

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>ALEX G. NASON</u> Telephone no. ► <u>203-856-5299</u> Located at ► <u>47 ROBIN HOOD ROAD, STAMFORD, CT</u> ZIP+4 ► <u>06907</u>			
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 ► <u>15</u> <u>N/A</u>			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

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

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

6b

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

X

If "Yes" to 6b, file Form 8870

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

☐ Yes ☒ No

7b

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

N/A

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 10		162,875.	73,294.	0.

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

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

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

0

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

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	2,579,955.
b	Average of monthly cash balances	1b	2,621,282.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	5,201,237.
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	5,201,237.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	78,019.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,123,218.
6	Minimum investment return. Enter 5% of line 5	6	256,161.

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	256,161.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	
b	Income tax for 2013. (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	256,161.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	256,161.
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	256,161.

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	392,576.
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	392,576.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	392,576.

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				256,161.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008	116,479.			
b From 2009				
c From 2010	73,086.			
d From 2011	114,879.			
e From 2012	144,645.			
f Total of lines 3a through e	449,089.			
4 Qualifying distributions for 2013 from Part XII, line 4. ► \$	392,576.			
a Applied to 2012, but not more than line 2a			0.	
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				256,161.
e Remaining amount distributed out of corpus	136,415.			
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:	585,504.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	116,479.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	469,025.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010	73,086.			
c Excess from 2011	114,879.			
d Excess from 2012	144,645.			
e Excess from 2013	136,415.			

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				
ALDRICH MUSEUM 258 MAIN STREET RIDGEFIELD, CT 06877	N/A	501(C)(3)	TO SUPPORT EDUCATION PROGRAMS AND TO ENRICH THE COMMUNITY BY PROVIDING DIVERSE ART PROGRAMS	1,000.
BALLET SCHOOL OF STAMFORD 201 SUMMER ST., 2ND FL STAMFORD, CT 06901	N/A	501(C)(3)	TO SUPPORT ARTISTIC TALENTS OF ITS STUDENTS THROUGH SCHOLARSHIPS TO PROVIDE DANCE	1,000.
BROOKLYN ACADEMY OF MUSIC 30 LAFAYETTE AVE BROOKLYN, NY 11217	N/A	501(C)(3)	TO SUPPORT WIDE RANGING PROGRAMS THAT PROVIDE GLOBAL ARTISTIC EXCELLENCE TO ITS AUDIENCES	1,000.
CARING UNLIMITED PO BOX 590 SANFORD, ME 04073	N/A	501(C)(3)	TO SUPPORT SAFETY PLANNING FOR INDIVIDUALS AND FAMILIES AFFECTED BY DOMESTIC ABUSE	5,000.
CHOATE ROSEMARY HALL 333 CHRISTIAN ST WALLINGFORD, CT 06492	N/A	501(C)(3)	TO SUPPORT EDUCATION THROUGH FINANCIAL AID TO STUDENTS	2,000.
Total	SEE CONTINUATION SHEET(S)			238,250.
b Approved for future payment				
NONE				
Total				0.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
DIVINE WORD OF MISSIONARIES 1835 WAUKEGAN ROAD TECHNY, IL 60082	N/A	501(C)(3)	TO SUPPORT MISSIONARY WORK	5,000.
DOCTORS WITHOUT BORDERS 333 7TH AVE, 2ND FL NEW YORK, NY 100015004	N/A	501(C)(3)	TO SUPPORT THE DELIVERY OF MEDICAL CARE TO THOSE TRAPPED IN SOME OF THE WORST CRISES GLOBALLY	1,000.
ENVIRONMENTAL LEARNING CENTER 255 LIVE OAK DR VERO BEACH, FL 32963	N/A	501(C)(3)	TO SUPPORT ENVIRONMENTAL TEACHING PROGRAMS FOR THE PROTECTION OF THE ENVIRONMENT	1,000.
EPIDEMIC ANSWERS P.O. BOX 191 WEST SIMSBURY, CT 06092	N/A	501(C)(3)	TO SUPPORT THE ADDRESSMENT OF AUTISM, ADHD, ALLERGIES, ASTHMA, LEARNING DISORDERS AND OTHER	1,000.
GEORGE WASHINGTON CARVER FOUNDATION 7 ACADEMY STREET NORWALK, CT 06850	N/A	501(C)(3)	TO SUPPORT EDUCATIONAL ENRICHMENT AND RECREATIONAL PROGRAMS TO LOW-INCOME YOUTH	1,000.
GERALDINE NUSSBAUM CHARITY - DRAVET SYNDROME FOUNDATION 11 NANCY DRIVE MONROE, CT 06468	N/A	501(C)(3)	TO SUPPORT THE RESEARCH TO CURE EPILEPSY CALLED THE DRAVET SYNDROME	1,000.
HIBISCUS CHILDREN'S CENTER 1145 12TH ST VERO BEACH, FL 32960	N/A	501(C)(3)	TO SUPPORT THE CENTER THAT PROVIDES SAFETY, SHELTER, AND RECOVERY PROGRAMS TO ABUSED CHILDREN/FAMILIES.	3,000.
HOMELESS FAMILY CENTER 715 FOURTH PLACE VERO BEACH, FL 32962	N/A	501(C)(3)	TO SUPPORT THE CENTER THAT PROVIDES SAFETY AND SHELTER FOR HOMELESS FAMILIES.	2,000.
INDIAN RIVER LAND TRUST 1904 12TH COURT VERO BEACH, FL 32960	N/A	501(C)(3)	TO SUPPORT THE PRESERVATION OF ENVIRONMENTALLY IMPORTANT LAND/WATER RESOURCES OF INDIAN	3,000.
INSTITUTE OF NAUTICAL ARCHAEOLOGY PO BOX DRAWER HG COLLEGE STATION, TX 778415137	N/A	501(C)(3)	TO SUPPORT THE STUDY OF ARCHEOLOGY/NAUTICAL SCIENCE THROUGH DISCOVER OF ANCIENT SHIPWRECKS	15,000.
Total from continuation sheets				228,250.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MARITIME AQUARIUM AT NORWALK 10 N WATER ST NORWALK, CT 06854	N/A	501(C)(3)	TO SUPPORT THE LARGEST INFORMAL EDUCATION PROGRAM IN CT FOR UNDERSERVED STUDENTS AND SCOUTS	10,000.
MCKEE BOTANICAL GARDEN 350 US 1 VERO BEACH, FL 32962	N/A	501(C)(3)	TO SUPPORT THE REVITALIZATION PROGRAM OF THE BOTANICAL GARDEN	2,000.
NEW CANAAN COUNTRY SCHOOL 545 PONUS RIDGE ROAD, PO BOX 997 NEW CANAAN, CT 06840	N/A	501(C)(3)	TO SUPPORT THE ENRICHMENT OF THE LEARNING ENVIRONMENT FOR STUDENTS	1,500.
NEW CANAAN MOUNTED TROOP, INC. 22 CARTER ST NEW CANAAN, CT 06840	N/A	501(C)(3)	TO SUPPORT THE FUNDING OF THERAPEUTIC RIDING PROGRAMS AND YOUTH RIDING SCHOLARSHIPS	1,000.
NEW YORK FOUNDATION FOR THE ARTS 155 AVENUE OF THE AMERICAS, 6TH FL NEW YORK, NY 100131507	N/A	501(C)(3)	TO SUPPORT THE SERVICES PROVIDED FOR ARTISTS AND THE CONTINUATION OF INNOVATIVE	1,000.
NICAPHOTO 13 NEWTOWN TERRACE NORWALK, CT 06851	N/A	501(C)(3)	TO SUPPORT EDUCATION, ART, AND PERSONAL DEVELOPMENT OF POVERTY STRICKEN CHILDREN	5,000.
OBEY FOUNDATION PO BOX 4724 WATERBURY, CT 06704	N/A	501(C)(3)	TO SUPPORT CHILDREN AND FAMILIES WHO NEED FOOD AND SHELTER IN AFRICA	5,000.
OCEAN RESEARCH AND CONSERVATION ASSOC 1420 SEAWAY DRIVE, 2ND FL FORT PIERCE, FL 34949	N/A	501(C)(3)	TO SUPPORT THE SEARCH FOR THE MEANS TO PREVENT THE CONTAMINATION OF LOCAL FRESH WATERWAYS	3,000.
OPEN DOOR SHELTER NORWALK CT 4 MERRITT STREET NORWALK, CT 06854	N/A	501(C)(3)	TO SUPPORT WIDE RANGING SERVICES FOR THE HOMELESS AND WORKING POOR	2,000.
OPERATION 300, INC PO BOX 309 PORT SALERNO, FL 34992	N/A	501(C)(3)	TO SUPPORT CMAPS FOR CHILDREN WHO HAVE LOST THIER FATHERS AS A RESULT OF MILITARY SERVICE.	500.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
OUTBACK NEW CANAAN TEEN CENTER 71 MAIN STREET NEW CANAAN, CT 06840	N/A	501(C)(3)	TO SUPPORT THE PROGRAMS TO ENSURE A SAFE ENVIRONMENT FOR THE YOUTH IN NEW CANAAN	500.
PETA 501 FRONT ST NORFOLK, VA 23510	N/A	501(C)(3)	TO SUPPORT ANIMAL RIGHTS.	1,000.
PILOBOLUS P.O. BOX 388 WASHINGTON DEPOT, CT 06794	N/A	501(C)(3)	TO SUPPORT THE PROMOTION OF CREATIVE EDUCATIONAL PROGRAMMING TO SERVE ALL	5,000.
PMC - JIMMY FUND 10 BROOKLINE PLACE WEST, 6TH FL BROOKLINE, MA 024457295	N/A	501(C)(3)	TO SUPPORT THE INNOVATIVE WORK OF MEDICAL STAFF AT THE DANA-FARBER CANCER INSTITUTE	2,000.
PROMINDFUL, INC 1177 HIGH RIDGE ROAD STAMFORD, CT 06905	N/A	501(C)(3)	TO SUPPORT THE PROMOTION OF HEALTH AND WELLNESS THROUGH HOLISTIC AND INTEGRATIVE PRACTICES	50,000.
PSC PARTNERS SEEKING A CURE 5237 SOUTH KENTON WAY ENGLEWOOD, CO 80111	N/A	501(C)(3)	TO SUPPORT PRIMARY SCLEROSING CHOLANGITIS PATIENTS AND FAMILIES SEEKING TO FIND A CURE	1,000.
RIVERSIDE CHILDREN'S THEATRE 3280 RIVERSIDE PARK DRIVE VERO BEACH, FL 32963	N/A	501(C)(3)	TO SUPPORT CHILDREN'S CULTURAL EDUCATION IN THEATRE ARTS	2,500.
ROSENSTIEL RSMAS 4500 RICKENBACKER CAUSEWAY MIAMI, FL 33149	N/A	501(C)(3)	TO SUPPORT THE MARINE AND ATMOSPHERIC SCIENCE PROGRAMS AND TO PROTECT THE ENVIRONMENT	10,000.
SARATOGA MUSEUM 104 CONSTITUTION AVE. SARATOGA, WY 82331	N/A	501(C)(3)	TO SUPPORT THE EXHIBITS AND CULTURAL EVENTS AT THE MUSEUM	1,000.
SAVE THE CHILDREN 54 WILTON ROAD WESTPORT, CT 06880	N/A	501(C)(3)	TO SUPPORT THE HEALTH, EDUCATION, AND PROTECTION OF CHILDREN IN THE POOREST AREAS OF THE WORLD	5,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
SCIENCE & CULTURE CONNECTION P.O. BOX 27423 SCOTTSDALE, AZ 85255	N/A	501(C)(3)	TO SUPPORT EDUCATIONAL RESOURCES FOR TEACHERS AND STUDENTS IN SCIENCES AND NATIVE AMERICAN CULTURE	1,250.
SOUTH HERO LAND TRUST PO BOX 455 SOUTH HERO, VT 05486	N/A	501(C)(3)	TO SUPPORT THE LAND CONSERVATION AND VOLUNTEER INITIATIVES	1,000.
ST DEMETRIOS GREEK ORTHODOX CHURCH 400 SKYWAY DR. CAMARILLO, CA 93010	N/A	501(C)(3)	TO SUPPORT THE CHURCH	1,000.
ST EDWARDS SCHOOL 1895 ST. EDWARD'S DR. VERO BEACH, FL 32963	N/A	501(C)(3)	TO SUPPORT THE EDUCATION OF CHILDREN	10,000.
SUN GROVE MONTESSORI 5610 OLEANDER AVE. FORT PIERCE, FL 34982	N/A	501(C)(3)	TO SUPPORT THE EDUCATION AND TRAILING OF STAFF TO BENEFIT THE CHILDREN	10,000.
SYRACUSE UNIVERSITY SYRACUSE UNIVERSITY SYRACUSE, NY 13244	N/A	501(C)(3)	TO SUPPORT SEVERAL HEALTH AND WELLNESS PROGRAMS AT THE UNIVERSITY	50,000.
TRIPLE GEM SOCIETY P.O. BOX 713 PRINCETON, NJ 08542	N/A	501(C)(3)	TO SUPPORT THE HUMANITARIAN INITIATIVES WORLDWIDE TO BRING PEACE AND HARMONY TO SUFFERING	5,000.
VERO BEACH MUSEUM OF ART 3001 RIVERSIDE PARK DR VERO BEACH, FL 32963	N/A	501(C)(3)	TO SUPPORT EXHIBITIONS AND ART PROGRAMS THAT SERVE THE COMMUNITY	1,000.
VERO BEACH OPERA 49 ROYAL PALM PT VERO BEACH, FL 32960	N/A	501(C)(3)	TO SUPPORT THE OPERA AND ARTISTS THAT SERVE THE COMMUNITY	3,000.
VNA & HOSPICE FOUNDATION 1110 35TH LN. VERO BEACH, FL 32960	N/A	501(C)(3)	TO SUPPORT THE HOME HEALTH AND HOSPICE CARE FOR THE COMMUNITY	4,000.
Total from continuation sheets				

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - BALLET SCHOOL OF STAMFORD

TO SUPPORT ARTISTIC TALENTS OF ITS STUDENTS THROUGH SCHOLARSHIPS TO
PROVIDE DANCE EDUCATION

NAME OF RECIPIENT - EPIDEMIC ANSWERS

TO SUPPORT THE ADDRESSMENT OF AUTISM, ADHD, ALLERGIES, ASTHMA, LEARNING
DISORDERS AND OTHER CHRONIC CHILDHOOD CONDITIONS.

NAME OF RECIPIENT - INDIAN RIVER LAND TRUST

TO SUPPORT THE PRESERVATION OF ENVIRONMENTALLY IMPORTANT LAND/WATER
RESOURCES OF INDIAN RIVER

NAME OF RECIPIENT - NEW YORK FOUNDATION FOR THE ARTS

TO SUPPORT THE SERVICES PROVIDED FOR ARTISTS AND THE CONTINUATION OF
INNOVATIVE INITIATIVES.

NAME OF RECIPIENT - PROMINDFUL, INC

TO SUPPORT THE PROMOTION OF HEALTH AND WELLNESS THROUGH HOLISTIC AND
INTEGRATIVE PRACTICES TO BALANCE THE MIND AND BODY

NAME OF RECIPIENT - TRIPLE GEM SOCIETY

TO SUPPORT THE HUMANITARIAN INITIATIVES WORLDWIDE TO BRING PEACE AND
HARMONY TO SUFFERING PEOPLE

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CHARLES SCHWAB	7.	0.	7.	7.	
LINN ENERGY	180.	0.	180.	180.	
POWERSHARES DB					
AGRICULTURE FUND	25.	0.	25.	25.	
POWERSHARES DB					
COMMODITY INDEX	4.	0.	4.	4.	
PROSHARES ULTRA					
SILVER	11.	0.	11.	11.	
TD AMERITRADE	74,400.	0.	74,400.	74,400.	
VANGUARD NATURAL					
RESOURCES	1.	0.	1.	1.	
TO PART I, LINE 4	74,628.	0.	74,628.	74,628.	

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PVR PARTNERS LP	312.	312.	
PVR PARTNERS LP	-16,277.	-16,277.	
POWERSHARES DB AGRICULTURE FUND	-2,158.	-2,158.	
VANGUARD NATURAL RESOURCES	706.	706.	
VANGUARD NATURAL RESOURCES	-5,407.	-5,407.	
POWERSHARES DB COMMODITY INDEX	-1,888.	-1,888.	
PROSHARES ULTRA SILVER	-305.	-305.	
LINN ENERGY	-40,283.	-40,283.	
PROSHARES ULTRA S&P 500	190.	190.	
TOTAL TO FORM 990-PF, PART I, LINE 11	-65,110.	-65,110.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	26,924.	13,462.		13,462.
TO FORM 990-PF, PG 1, LN 16B	26,924.	13,462.		13,462.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BENEFITS ADMINISTRATION	60.	30.		30.
TO FORM 990-PF, PG 1, LN 16C	60.	30.		30.

FORM 990-PF	TAXES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAXES	9,711.	4,856.		4,855.
FILING FEES	50.	0.		50.
FOREIGN TAXES	3,050.	3,050.		0.
TO FORM 990-PF, PG 1, LN 18	12,811.	7,906.		4,905.

FORM 990-PF	OTHER EXPENSES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES & SUBSCRIPTIONS	509.	254.		255.
LIABILITY INSURANCE	3,044.	0.		3,044.
OFFICE EXPENSE	4,193.	2,097.		2,096.
DIVIDENDS PAID - SHORT POSITION	12,161.	12,161.		0.
TO FORM 990-PF, PG 1, LN 23	19,907.	14,512.		5,395.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	7
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE	FAIR MARKET VALUE
COMPUTER	2,633.	2,557.	76.	76.
OFFICE EQUIPMENT	870.	845.	25.	25.
PRINTER	180.	180.	0.	0.
COMPUTER	2,386.	2,386.	0.	0.
TO 990-PF, PART II, LN 14	6,069.	5,968.	101.	101.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITIES	3,771,873.	3,541,497.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,771,873.	3,541,497.

FORM 990-PF	OTHER ASSETS	STATEMENT	9
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
DIVIDENDS DUE FROM BROKER	0.	11,145.	11,145.
TO FORM 990-PF, PART II, LINE 15	0.	11,145.	11,145.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 10
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ALEXANDER G. NASON 47 ROBIN HOOD ROAD STAMFORD, CT 06907	PRESIDENT/TREASURER 40.00	162,875.	73,294.	0.
LUCIE BURKE 4311 SECOND SQUARE SW VERO BEACH, FL 32968	SECRETARY 0.00	0.	0.	0.
VINCENT BURKE 4311 SECOND SQUARE SW VERO BEACH, FL 32968	DIRECTOR 0.00	0.	0.	0.
SOFIA BLANCHARD 95 SURF LAND VERO BEACH, FL 32963	CHAIRMAN 0.00	0.	0.	0.
ALEXANDRA NASON 3621 N. 68TH STREET SCOTTSDALE, AZ 85251	DIRECTOR 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		162,875.	73,294.	0.

2013 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	COMPUTER	040609	200DB	5.00	17	2,633.		1,317.	1,316.	1,089.		151.
2	OFFICE EQUIPMENT	072409	200DB	5.00	17	870.		435.	435.	360.		50.
3	PRINTER	030411	200DB	5.00	17	180.		180.				0.
4	COMPUTER	072911	200DB	5.00	17	2,386.		2,386.				0.
* TOTAL 990-PF PG 1 DEPR						6,069.		4,318.	1,751.	1,449.	0.	201.