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Form 990-PF

Department of the Treasury
Internal Revenue ServiceReturn of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2013

Open to Public Inspection

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

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

Name of foundation THE BOKOM FOUNDATION, INC.		A Employer identification number 34-176 0423
Number and street (or P O box number if mail is not delivered to street address) PO BOX 459	Room/suite	B Telephone number (see instructions) (330) 239-3565
City or town, state or province, country, and ZIP or foreign postal code SHARON CENTER, OH 44274		C If exemption application is pending, check here ☐
G Check all that apply	☐ Initial return ☐ Final return ☐ Address change	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 ☐
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) \$ 1,180,998	J Accounting method: ☐ Cash ☐ Accrual ☐ Other (specify) _____	

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)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check ☒ if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	30,787	30,787		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	10,899			
b	Gross sales price for all assets on line 6a 280,020				
7	Capital gain net income (from Part IV, line 2)		10,899		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule) STM106	17,279	17,279		
12	Total. Add lines 1 through 11	58,965	58,965		
13	Compensation of officers, directors, trustees, etc.				
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)				
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see instructions) STM110	253			
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule) STM103	47			
24	Total operating and administrative expenses. Add lines 13 through 23	300	0	0	
25	Contributions, gifts, grants paid	67,350			67,350
26	Total expenses and disbursements. Add lines 24 and 25	67,650	0		67,350
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	(8,685)			
b	Net investment income (if negative, enter -0-)		58,965		
c	Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2013)

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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	23,482	4,920	4,920
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations (attach schedule)	272,454	247,799	246,317
	b Investments - corporate stock (attach schedule) STM137	462,537	479,484	611,091
	c Investments - corporate bonds (attach schedule) STM138	163,402	180,511	181,354
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule) STM118	137,537	138,013	137,316
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	1,059,412	1,050,727	1,180,998
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0	0	
	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	28,713	28,713	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	1,030,699	1,022,014	
	30 Total net assets or fund balances (see instructions)	1,059,412	1,050,727	
	31 Total liabilities and net assets/fund balances (see instructions)	1,059,412	1,050,727	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,059,412
2 Enter amount from Part I, line 27a	2	(8,685)
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	1,050,727
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,050,727

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 (yr, mo, day)	(d) Date sold (yr, mo, day)
1a See STM-134				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 280,020		269,121	10,899
b			
c			
d			
e			

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

(i) FMV 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			10,899
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	10,899
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	(89)

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	80,650	1,130,515	0.071339
2011	53,550	1,146,181	0.04672
2010	55,000	1,113,359	0.0494
2009	53,200	1,044,762	0.050921
2008	67,300	1,166,559	0.057691

2 Total of line 1, column (d)	2	0.276071
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	0.055214
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	1,162,640
5 Multiply line 4 by line 3	5	64,194
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	590
7 Add lines 5 and 6	7	64,784
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	67,350

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter. _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	590
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3 Add lines 1 and 2		3	590
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	590
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a		
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		
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		590
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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 ☐ \$ _____ (2) On foundation managers ☐ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ OH		
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 ▶ N/A	13		X
14	The books are in care of ▶ <u>GEORGE R. KLEIN</u> Telephone no ▶ <u>330-239-3565</u> Located at ▶ <u>PO BOX 459, SHARON CENTER, OH</u> ZIP+4 ▶ <u>44274</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	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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ▶	16	Yes	No X

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

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

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

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

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

5b

6b

7b

X

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
GEORGE R. KLEIN PO BOX 459, SHARON CENTER, OH 44274	PRESIDENT / TRE	0	0	0
SUSAN A. KLEIN PO BOX 459, SHARON CENTER, OH 44274	VICE PRESIDENT	0	0	0

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 ▶		

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 instructions	
3	
Total. Add lines 1 through 3 ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,155,363
b	Average of monthly cash balances	1b	24,982
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	1,180,345
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	1,180,345
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	17,705
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,162,640
6	Minimum investment return. Enter 5% of line 5	6	58,132

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	58,132
2a	Tax on investment income for 2013 from Part VI, line 5	2a	590
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	590
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	57,542
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	57,542
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	57,542

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	67,350
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	67,350
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	590
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	66,760

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				57,542
2 Undistributed income, if any, as of the end of 2013:				
a Enter amount for 2012 only			30,501	
b Total for prior years				
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				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 67,350				
a Applied to 2012, but not more than line 2a			30,501	
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2013 distributable amount				36,849
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b Taxable amount - see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				20,693
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year CONSERVANCY FOR CUYAHOGA VALLEY NAT				7,000
OHIO AND ERIE CANALWAY COALITION				1,000
CUYAHOGA VALLEY SCENIC RAILROAD				1,000
AKRON ART MUSEUM				8,000
AKRON GARDEN CLUB				200
AKRON COMMUNITY FOUNDATION CHILDREN				500
BATH HISTORICAL SOCIETY				200
BATTERED WOMENS SHELTER AKRON				200
Total ► 3a				
b Approved for future payment				
Total ► 3b				

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
CLEVELAND MUSEUM OF NATURAL HISTORY				7,500
CLEVELAND BOTANICAL GARDEN				200
COUNTRYSIDE CONSERVANCY GIFT				500
CROWN POINT ECOLOGY CENTER				200
TROUT UNLIMITED COLDWATER CONSERVAT				1,500
TROUT UNLIMITED				1,000
CONSERVANCY FOR CUYAHOGA VALLEY NAT				12,000
CONSERVANCY FOR CUYAHOGA VALLEY NAT				1,000
Total ► 3a				
b Approved for future payment				
Total ► 3b				

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year DUCKS UNLIMITED				
				1,000
OHIO AND ERIE CNALWAY COALITION				200
OLD TRAIL SCHOOL			GRANDPARENTS FUND	1,200
STAN HYWET				200
THEODORE ROOSEVELT CONSERVATION PAR				1,000
TRUST FOR PUBLIC LAND			OHIO OFFICE GIFT	5,000
UNITED METHODIST CHURCH			RETIRED MINISTERS DINNER	3,500
UNIVERSITY SCHOOL				250
Total			3a	
b Approved for future payment				
Total			3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year VICTORY GALLOP				500
BATH PONY CLUB				200
CENTRAL ASIA INSTITUTE				200
CENTRAL PARK CONSERVANCY				200
KOWALCHICK MEMORIAL FUND				5,000
EECO PROJECT				200
FORMAN SCHOOL				500
SMOKY MOUNTAIN INSTITUTE OF TREMONT				200
Total			▶ 3a	
b Approved for future payment				
Total			▶ 3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
GREEN MOUNTAIN CLUB				200
HILL-STEAD MUSEUM				200
KENTS HILL SCHOOL				200
LITCHFIELD MONTESSORI SCHOOL				200
LIVINGSTON RIPLEY WATERFOWL CONSERV				200
OHIO WESLEYAN UNIVERSITY				400
OLD TRAIL SCHOOL				400
PORTSMOUTH ABBEY SCHOOL				200
Total ► 3a				
b Approved for future payment				
Total ► 3b				

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 SLU HIGH SCHOOL				200
HILL SCHOOL				200
LAND TRUST ALLIANCE				200
TRUMAN STATE UNIVERSITY				200
WALSH JESUIT				200
WITTENBURG UNIVERSITY				200
OHIO ENVIRONMENTAL COUNCIL				1,000
AKRON ART MUSEUM FAMILY DROP IN DAY				1,500
Total			▶	3a
b Approved for future payment				
Total			▶	3b

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 TVRC EDUCATION FUND				300
Total			3a	67,350
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

▼

Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

[illegible]

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

(2) Other assets

b Other transactions:

(1) Sales of assets to a noncharitable exempt organization

(2) Purchases of assets from a noncharitable exempt organization

(3) Rental of facilities, equipment, or other assets

(4) Reimbursement arrangements

(5) Loans or loan guarantees

(6) Performance of services or membership or fundraising solicitations

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

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.

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

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) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date _____

PRESIDENT / TREASURER

Title

May the IRS discuss this return with the preparer shown below (see inst)? ☒ Yes ☐

**Paid
Preparer
Use Only**

Pnnt/Type preparer's name

MEGAN KOWALCHICK CPA

Preparer's signature

Mezri Kachnik CPH

Date

08-21-2014

Check ☒ if self-employed

PTIN

P00960619

Firm's name

Firm's address

► 547 S Plains Rd
Witchfield, CT 06759

Firm's EIN

Phone no

330-618-7246

Federal Supporting Statements

2013 PG 01

Name(s) as shown on return

FEIN

THE BOKOM FOUNDATION, INC.

34-1760423

Form 990PF, Part II, Line 13 Investments: Other Schedule

Statement #118

Category	Book value (BOY)	Book value (EOY)	FMV (EOY)
COHEN & STEERS REALTY SHARES	26,859	30,747	41,076
VAN ECK GLOBAL HARD ASSETS	33,412		
PIMCO ALL ASSETS AUTH	77,266	107,266	96,240
Total	137,537	138,013	137,316

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Form 990PF, Part II, Line 10(a) Investments: U.S. Government Obligation Schedule

Statement #136

Category	Book Value (BOY)	Book Value (EOY)	FMV (EOY)
PIMCO REAL RETURN	79,581		
PIMCO TOTAL RETURN	192,873	95,622	94,223
VANGUARD SHORT TERM		152,177	152,094
Totals	272,454	247,799	246,317

Federal Supporting Statements

2013 PG 01

Name(s) as shown on return

FEIN

THE BOKOM FOUNDATION, INC.

34-1760423

Form 990PF, Part II, Line 10(b) Investments: Corporate Stock Schedule

Statement #137

Category	BOY	Book Value	EOY FMV
EMERSON ELECTRIC CO.	4,069	4,508	6,316
TJX COS		7,660	10,898
GENERAL ELECTRIC CO	3,010		
US BANCORP		6,119	7,555
UNITED TECHNOLOGIES CORP		4,202	4,552
AT&T	6,712		
MCDONALDS	6,451	7,807	10,964
AMERICAN EXPRESS		6,205	9,527
FINANCIAL SELECT SECTOR		5,579	5,946
HJ HEINZ	5,335		
KELLOGG	6,399	5,442	6,596
PEPSICO	5,535	5,198	7,382
PROCTER & GAMBLE	4,561	4,213	7,245
ILLINOIS TOOL WORKS	3,639	3,555	6,642
PHILIP MORRIS INTERNATIONAL	5,967	5,137	6,186
CHEVRON	3,170	3,430	10,118
EXXON MOBIL	4,378	4,345	11,132
JP MORGAN CHASE	6,086	6,396	9,006
WALT DISNEY CO		5,794	6,112
ABBOT LABORATORIES	5,050	6,957	9,276
JOHNSON & JOHNSON	5,059	6,471	9,983
APPLE INC		7,122	7,293
GOOGLE INC		7,292	11,207
INTEL CORP	7,546	7,371	8,954
MICROSOFT CORP	8,790		
ORACLE		7,355	8,149
PAYCHEX	7,795	6,829	10,563
EXELON CORP	5,157		
NEXTERA ENERGY INC	4,632		
QUALCOMM CORP		7,414	8,465
WW GRAINGER INC		4,982	6,130
ROYCE SPECIAL EQUITY	26,297	29,137	35,028
GMO QUALITY FUND IV	57,788	64,083	70,864
3M CO	3,869	4,436	7,293
VANGUARD PRIMECAP	63,088	66,636	90,562
EI DU PONT DE NEMOURS	4,926	4,176	5,782
MANAGERS TIMESSQ S/C GRW -IN	28,015	30,377	40,607
MATTHEWS ASIAN GROWTH & INCOME	37,842	38,096	40,708
THORNBURG INTL VALUE	53,415	53,415	59,194
HONEYWELL INTERNATIONAL	3,885	4,275	6,944
LOCKHEED MARTIN CORP	6,644		
DARDEN RESTAURANTS	9,761		
COCA COLA CO	4,067	4,067	4,585
CONOCOPHILLIPS	10,459	6,062	7,559
WELLS FARGO	6,107	6,455	8,626

Federal Supporting Statements

2013 PG 02

Name(s) as shown on return

FEIN

THE BOKOM FOUNDATION, INC.

34-1760423

**Form 990PF, Part II, Line 10(b)
Investments: Corporate Stock Schedule**

Statement #137

<u>Category</u>	<u>BOY</u>	<u>Book Value</u>	<u>EOY FMV</u>
ELI LILLY & CO	8,720	6,324	8,007
MERCK & CO INC	9,323	7,438	9,409
NOVARTIS AG ADR	5,788	7,124	9,726
MICROCHIP TECHNOLOGY INC	8,762		
FIRST ENERGY CORP	4,440		
Totals	<u>462,537</u>	<u>479,484</u>	<u>611,091</u>

**Form 990PF, Part II, Line 10(c)
Investments: Corporate Bond Schedule**

PG 01
Statement #138

<u>Category</u>	<u>BOY</u>	<u>Book Value</u>	<u>EOY FMV</u>
GLENMEDE FUND INC - CORE	69,021	57,539	54,360
BLACKROCK FLOATING RATE INCOME		28,071	28,125
TEMPLETON GLOBAL BOND	73,733	73,751	76,833
TIAA CREF HIGH YIELD FUND	20,648	21,150	22,036
Totals	<u>163,402</u>	<u>180,511</u>	<u>181,354</u>

Federal Supporting Statements

2013 PG 01

Your Social Security Number
34-1760423

Name(s) as shown on return

THE BOKOM FOUNDATION, INC.

Form 990PF, Part I, Line 23 - Other Expenses Schedule

Statement #103

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
MISCELLANEOUS	47	0	0	0
Totals	47	0	0	0

PG 01
Statement #106

Form 990PF, Part I, Line 11 - Other Income Schedule

Description	Revenue and expenses	Net investment	Adjusted net income
CAPITAL GAIN DISTRIBUTION (15% UNRECAPTURED SECTION 1250 GAIN	17,201	17,201	0
Totals	17,279	17,279	0

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2013 PG 01

Your Social Security Number

34-1760423

Name(s) as shown on return

THE BOXOM FOUNDATION, INC.

Statement #110

Form 990PF, Part I, Line 18 - Taxes Schedule

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
FOREIGN TAXES PAID	253	0	0	0
Totals	253	0	0	0

Federal Supporting Statements

2013 PG 01

Your Social Security Number

34-1760423

Name(s) as shown on return

THE BOKOM FOUNDATION, INC..

Form 990-PF, Part IV, Capital Gains And Losses Information (Overflow)

Statement #134

Description	P-Purchase D-Donation	Date Acquired	Date Sold	Sales Price	Depreciation	Cost or other basis	Gain or Loss	Gains Minus	
								Excess or	Losses
CONOCOPHILLIPS		2012-01-04	2013-01-03	177		171	6		6
DARDEN RESTAURANTS INC		2012-01-04	2013-01-03	9,784		9,761	23		23
E I DU PONT DE NEMOURS & CO		2012-01-04	2013-01-03	734		751	(17)		(17)
EXELON CORPORATION		2012-01-04	2013-01-03	1,372		1,908	(536)		(536)
FIRSTENERGY CORP		2012-01-04	2013-01-03	587		592	(5)		(5)
INTEL CORP		2012-01-04	2013-01-03	148		175	(27)		(27)
ELI LILLY & CO		2012-01-04	2013-01-03	2,370		2,396	(26)		(26)
LOCKHEED MARTIN COPR		2012-02-02	2013-01-03	7,498		6,644	854		854
MERCK & CO INC		2012-10-24	2013-01-03	1,693		1,885	(192)		(192)
MICROCHIP		2012-01-04	2013-01-03	8,224		8,418	(194)		(194)
NEXTERRA ENERGY		2012-01-04	2013-01-03	1,689		1,416	273		273
PIMCO TOTAL RETURN FUND		2012-01-04	2013-08-13	4,371		4,619	(248)		(248)
GLENMEDE FUND INC		2013-12-12	2013-12-23	140		140			
AT&T Inc		2008-04-04	2013-01-03	70		77	(7)		(7)
EXELON CORPORATION		2012-01-01	2013-01-03	1,820		3,250	(1,430)		(1,430)
GENERAL ELECTRIC CO		2012-01-01	2013-01-03	4,492		3,010	1,482		1,482
HJ HEINZ CO		2009-08-26	2013-01-03	934		625	309		309
ILLINOIS		2010-08-23	2013-01-03	125		84	41		41
KELLOGG CO		2006-09-15	2013-01-03	1,072		957	115		115
MICROSOFT CORP		2012-01-01	2013-01-03	1,508		1,539	(31)		(31)
NEXTERA ENERGY INC		2012-01-01	2013-01-03	3,659		3,215	444		444
PAYCHEX INC		2009-08-26	2013-01-03	1,090		966	124		124
PEPSICO INC		2002-11-21	2013-01-03	553		337	216		216
PHILIP MORRIS INTERNATIONAL		2010-08-23	2013-01-03	1,379		831	548		548
PROCTER & GAMBLE CO		2002-11-21	2013-01-03	552		348	204		204
ABBVIE INC COM		2012-01-01	2013-01-30	3,007		1,953	1,054		1,054
ABBVIE INC COM		2012-01-04	2013-01-30	853		674	179		179
PIMCO REAL RETURN FUND		2012-01-01	2013-06-03	85,137		79,581	5,556		5,556
HJ HEINZ CO		2009-08-26	2013-06-10	4,278		2,306	1,972		1,972
HJ HEINZ CO		2012-01-04	2013-06-10	3,263		2,404	859		859
AT&T INC		2008-04-04	2013-07-29	3,980		4,283	(303)		(303)
CHEVRON CORP		2012-01-01	2013-07-29	1,764		515	1,249		1,249
CHEVRON CORP		2012-01-04	2013-07-29	251		221	30		30
CONOCOPHILLIPS COM		2012-01-04	2013-07-29	4,807		4,226	581		581

Federal Supporting Statements

2013 PG 02

Your Social Security Number

34-1760423

Name(s) as shown on return

THE BOKOM FOUNDATION, INC.

Form 990-PF, Part IV, Capital Gains And Losses Information (Overflow)

Statement #134

Description	P-Purchase D-Donation	Date Acquired	Date Sold	Sales Price	Depreciation	Cost or		Gain or Loss	Gains Minus Excess or Losses
						other basis			
EXXON MOBIL CORPORATION		2002-08-19	2013-07-29	561		224		337	337
EXXON MOBIL CORPORATION		2012-01-04	2013-07-29	468		429		39	39
MICROSOFT CORP		2012-01-04	2013-07-29	1,414		1,234		180	180
PIMPCO TOTAL RETURN FUND		2012-01-01	2013-08-13	90,811		93,257		(2,446)	(2,446)
MICROSOFT COPR		2006-09-15	2013-09-04	2,998		2,562		436	436
MICROSOFT CORP		2012-01-04	2013-09-04	3,935		3,455		480	480
GLENMEDE FUND INC		2011-12-09	2013-12-11	1,000		1,048		(48)	(48)
AT&T INC		2012-01-01	2013-12-17	2,699		2,352		347	347
FIRST ENERGY CORP		2012-01-04	2013-12-17	2,893		3,848		(955)	(955)
GELENMEDE FUND INC		2011-12-09	2013-12-23	9,860		10,434		(574)	(574)
Total				280,020		269,121		10,899	10,899

Federal Supporting Statements**2013 PG 01**

Name(s) as shown on return

Your Social Security Number

THE BOKOM FOUNDATION, INC.

34-1760423

**Form 990PF, Part XV, Line 2
Application Submission Information****Grant Program**

NA

Applicant Name

GEORGE KLEIN

Address

PO BOX 459

SHARON CENTER, OH 44274

Telephone

330-239-3565

Email Address**Form & Content**

NO REQUIREMENTS

Submission Deadline

NO DEADLINE

Restrictions on Award

NA