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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 IRVING I STONE FOUNDATION C/O MARY KAY INCANDELA % MARY KAY INCANDELA		A Employer identification number 34-1892327	
Number and street (or P O box number if mail is not delivered to street address) ONE AMERICAN ROAD Suite		B Telephone number (see instructions) (216) 252-7300	
City or town, state or province, country, and ZIP or foreign postal code CLEVELAND, OH 44144		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input checked="" type="checkbox"/> \$ 38,306,398	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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 <input type="checkbox"/>	

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)	345,454			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	61	61	61	
	4 Dividends and interest from securities.	949,405	949,405	949,405	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-1,587,877			
	b Gross sales price for all assets on line 6a 6,321,589				
	7 Capital gain net income (from Part IV, line 2) . . .		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	-292,957	949,466	949,466	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	10,667	8,000	8,000	2,667
	b Accounting fees (attach schedule)	11,950	5,975	0	5,975
	c Other professional fees (attach schedule)				
	17 Interest	123	123	123	
	18 Taxes (attach schedule) (see instructions)	50,649	50,649	50,649	
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	10,616	10,416	10,416	200
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	84,005	75,163	69,188	8,842
	25 Contributions, gifts, grants paid	1,599,650			1,599,650
	26 Total expenses and disbursements. Add lines 24 and 25	1,683,655	75,163	69,188	1,608,492
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-1,976,612			
	b Net investment income (if negative, enter -0-)		874,303		
	c Adjusted net income (if negative, enter -0-)			880,278	

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	6,627	95,953	95,953
	2	Savings and temporary cash investments	347,656	792,457	792,457
	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) ▶ _____ 14,205,652 Less allowance for doubtful accounts ▶ _____	14,411,411	14,205,652	14,205,652
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	13,794,354	11,182,213	18,180,052
	c	Investments—corporate bonds (attach schedule).	1,063,701	1,067,698	1,080,443
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	3,364,896	3,668,060	3,951,841
	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)	32,988,645	31,012,033	38,306,398
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	32,988,645	31,012,033	
	30	Total net assets or fund balances (see page 17 of the instructions)	32,988,645	31,012,033	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	32,988,645	31,012,033	

Part III

Analysis of Changes in Net Assets or Fund Balances

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Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
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 See Additional Data Table			
b			
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 See Additional Data Table			
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	-1,587,877
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			
2011			
2010			
2009			
2008			

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

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See
the Part VI instructions


Part VI

Excise 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 <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b		1	17,486
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3 Add lines 1 and 2.		3	17,486
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	17,486
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	79,212	
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	79,212
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8	28
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed <input type="checkbox"/>		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . <input type="checkbox"/>		10	61,698
11 Enter the amount of line 10 to be Credited to 2014 estimated tax <input type="checkbox"/> 61,698 Refunded <input type="checkbox"/>		11	

Part VII-A

Statements 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)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>	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 <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T.</i>	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	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> 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? <i>If "No," attach explanation .</i>	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)? <i>If "Yes," complete Part XIV</i>	9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i> 	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				
14	The books are in care of MARY KAY INCANDELA Telephone no (216) 252-7300 Located at ONE AMERICAN ROAD CLEVELAND OH ZIP+4 44144			
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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).			
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		
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? 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		No
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?			
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		No
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

No

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

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

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

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

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Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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 page 24 of the 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	35,042,100
b	Average of monthly cash balances.	1b	605,122
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	35,647,222
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	35,647,222
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	534,708
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	35,112,514
6	Minimum investment return. Enter 5% of line 5.	6	1,755,626

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	1,755,626
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	17,486
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	17,486
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,738,140
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,738,140
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	1,738,140

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	1,608,492
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,608,492
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,608,492
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			
2		Undistributed income, if any, as of the end of 2013			
a		Enter amount for 2012 only. 0			
b		Total for prior years 2011 , 2010 , 2009 0			
3		Excess distributions carryover, if any, to 2013			
a		From 2008. 148,822			
b		From 2009.			
c		From 2010.			
d		From 2011. 450,991			
e		From 2012. 190,734			
f		Total of lines 3a through e. 790,547			
4		Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 1,608,492			
a		Applied to 2012, but not more than line 2a 0			
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. 1,608,492			
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).) 129,648			
6		Enter the net total of each column as indicated below:			
a		Corpus Add lines 3f, 4c, and 4e Subtract line 5 660,899			
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.			
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 0			
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). 19,174			
9		Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a 641,725			
10		Analysis of line 9			
a		Excess from 2009.			
b		Excess from 2010.			
c		Excess from 2011. 450,991			
d		Excess from 2012. 190,734			
e		Excess from 2013.			

Part XIV

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. . . .

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

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

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

1 Information Regarding Foundation Managers:

■ 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))

• 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 of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	1,599,650
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
BOTEL ASSET MGMT - CG DIVIDENDS	P	2012-01-01	2013-12-31
KEYBANK ACCT - CG DIVIDENDS	P	2012-01-01	2013-12-31
KEYBANK ACCT 102300529460	P	2010-01-01	2013-06-30
KEYBANK ACCT 102300529460	P	2012-01-01	2013-12-31
NEUBERGER BERMAN	P	2013-01-01	2013-06-30
NEUBERGER BERMAN	P	2012-01-01	2013-12-31
VANGUARD FUND - CG DIVIDENDS	P	2012-01-01	2013-12-31
VANGUARD FUND - CG DIVIDENDS	P	2012-01-01	2013-12-31
PRIMUS CAPITAL FUND VI	P	2010-01-01	2013-12-31
PRIMUS CAPITAL FUND VI	P	2013-01-01	2013-06-30
ARIEL FUND	P	2008-01-01	2013-12-31
SP CAPITAL/GOLDMAN	P	2009-01-01	2013-12-31

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
23,818		0	23,818
2,004		0	2,004
4,403,603		5,447,534	-1,043,931
5,827		2,758	3,069
104,879		90,665	14,214
59,377		57,732	1,645
22,250		0	22,250
1,971		0	1,971
66,319		0	66,319
0		206	-206
98,541		0	98,541
1,533,000		2,310,571	-777,571


Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			23,818
			2,004
			-1,043,931
			3,069
			14,214
			1,645
			22,250
			1,971
			66,319
			-206
			98,541
			-777,571

Form 990PF Part VIII Line 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
GARY WEISS	PRESIDENT 0	0		
ONE AMERICAN ROAD CLEVELAND, OH 44144				
JUDITH STONE WEISS	SECRETARY & TRUSTEE 0	0		
ONE AMERICAN ROAD CLEVELAND, OH 44144				
HENSHA GANSBOURG	TRUSTEE 0	0		
ONE AMERICAN ROAD CLEVELAND, OH 44144				
MYRNA TATAR	TRUSTEE 0	0		
ONE AMERICAN ROAD CLEVELAND, OH 44144				
HELEN STONE	TRUSTEE 0	0		
ONE AMERICAN ROAD CLEVELAND, OH 44144				
MORRY WEISS	TRUSTEE 0	0		
ONE AMERICAN ROAD CLEVELAND, OH 44144				
JEFFREY WEISS	TRUSTEE 0	0		
ONE AMERICAN ROAD CLEVELAND, OH 44144				
ZEV WEISS	TRUSTEE 0	0		
ONE AMERICAN ROAD CLEVELAND, OH 44144				
ELIE WEISS	TRUSTEE 0	0		
ONE AMERICAN ROAD CLEVELAND, OH 44144				


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 FRIENDS OF AUC 136 EAST 39TH STREET NEWYORK,NY 10016	NONE	PC	COMMUNITY OUTREACH	5,500
AMERICAN FRIENDS OF LEKET ISRAEL 1402 TEANECK ROAD 223 TEANECK,NJ 07666	NONE	PC	COMMUNITY OUTREACH	1,000
AMERICAN FRIENDS OF MAGEN 23215 COMMERCE PARK ROAD 306 BEACHWOOD,OH 44122	NONE	PC	COMMUNITY OUTREACH	1,000
AMERICAN FRIENDS OF MEIR PANIM 5316 NEWUTRECHT AVE BROOKLYN,NY 11219	NONE	PC	COMMUNITY OUTREACH	1,000
AMERICAN FRIENDS OF YHS KIRYAT ARBA 1342 EAST 4TH STREET BROOKLYN,NY 11230	NONE	PC	EDUCATIONAL SUPPORT	4,500
AMERICAN FRIENDS OF NISHMAT 274 MADISON AVE 504 NEWYORK,NY 10016	NONE	PC	EDUCATIONAL SUPPORT	18,000
AMERICAN FRIENDS OF YAD ELIEZER 1102 EAST 26TH STREET BROOKLYN,NY 11210	NONE	PC	COMMUNITY OUTREACH	1,000
AMERICAN JEWISH JOINT DISTRIBUTION 711 THIRD AVE NEWYORK,NY 10017	NONE	PC	COMMUNITY OUTREACH	5,000
AMIT WOMEN 817 BROADWAY AVE 4 NEWYORK,NY 10003	NONE	PC	COMMUNITY OUTREACH	5,000
BAR-IIAN UNIVERSITY 6735 TELEGRAPH ROAD 130 BLOOMFIELD HILLS,MI 48301	NONE	PC	EDUCATIONAL SUPPORT	20,000
BIKUR CHOLIM COMMITTEE 3653 SHANNON ROAD CLEVELAND,OH 44118	NONE	PC	COMMUNITY OUTREACH	5,000
BNAI JESHURUN CONGREGATION 27501 FAIRMOUNT BLVD CLEVELAND,OH 44124	NONE	PC	RELIGIOUS EDUCATIONAL SUPPORT	500
BNEI AKIVA OF CLEVELAND 2463 SOUTH GREEN RD BEACHWOOD,OH 44122	NONE	PC	RELIGIOUS EDUCATIONAL SUPPORT	43,000
BOCA RATON SYNAGOGUE 7900 MONTOYA CIRCLE BOCA RATON,FL 33433	NONE	PC	RELIGIOUS EDUCATIONAL SUPPORT	4,500
CAMP STONE 2145 DEER RUN ROAD SUGAR GROVE,PA 16350	NONE	PC	EDUCATIONAL SUPPORT	102,000
Total  3a				1,599,650


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>				
CENTER FOR THE JEWISH FUTURE 500 WEST 185TH STREET NEW YORK,NY 10033	NONE	PC	EDUCATIONAL SUPPORT	10,000
CENTRAL FUND OF ISRAEL 980 6TH AVE NEW YORK,NY 10018	NONE	PC	COMMUNITY OUTREACH	9,000
CHABAD AT NYU 353 BOWERY NEW YORK,NY 10003	NONE	PC	COMMUNITY OUTREACH	10,000
CHABAD LUBAVITCH 223 WEST GILMAN STREET MADISON,WI 53703	NONE	PC	COMMUNITY OUTREACH	1,800
CHABAD OF BOCA RATON 17950 MILITARY TRAIL BOCA RATON,FL 33496	NONE	PC	EDUCATIONAL SUPPORT	5,000
CHAI LIFELINE 151 WEST 30TH STREET NEW YORK,NY 10001	NONE	PC	COMMUNITY OUTREACH	1,000
CLEVELAND HILLEL FOUNDATION 11291 EUCLID AVE CLEVELAND,OH 44106	NONE	PC	EDUCATIONAL SUPPORT	750
EFRAT EMERGENCY MEDICAL CENTER 1360 CLIFTON AVE 323 CLIFTON,NJ 07012	NONE	PC	COMMUNITY OUTREACH	2,500
EMUNAH 7 PENN PLAZA 205 NEW YORK,NY 10001	NONE	PC	COMMUNITY OUTREACH	5,000
EZRAT ISRAEL 806 EASTERN PARKWAY BROOKLYN,NY 11213	NONE	PC	COMMUNITY OUTREACH	5,000
FRIENDS OF THE ISRAELI DEFENSE FORCES PO BOX 22410 BEACHWOOD,OH 44122	NONE	PC	COMMUNITY OUTREACH	10,000
FRIENDSHIP CIRCLE OF CLEVELAND 1980 SOUTH GREEN ROAD SOUTH EUCLID,OH 44121	NONE	PC	EDUCATIONAL SUPPORT	10,000
FUCHS MIZRACHI SCHOOL 26600 SHAKER BLVD BEACHWOOD,OH 44122	NONE	PC	EDUCATIONAL SUPPORT	400,000
GREEN ROAD SYNAGOGUE 2437 SOUTH GREEN ROAD BEACHWOOD,OH 44122	NONE	PC	COMMUNITY OUTREACH	30,000
GROSS SCHECHTER DAY SCHOOL 27601 FAIRMOUNT BLVD PEPPER PIKE,OH 44124	NONE	PC	EDUCATIONAL SUPPORT	5,000
Total  3a				1,599,650

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>				
HEBREW ACADEMY OF CLEVELAND 1860 SOUTH TAYLOR ROAD CLEVELAND HTS, OH 44118	NONE	PC	EDUCATIONAL SUPPORT	37,000
JEWISH CENTER OF SOLON CHABAD 5570 HARPER ROAD SOLON, OH 44139	NONE	PC	COMMUNITY OUTREACH	1,000
JEWISH FAMILY EXPERIENCE 3570 WARRENSVILLE CENTER ROAD 102D SHAKER HTS, OH 44122	NONE	PC	COMMUNITY OUTREACH	10,000
JEWISH COMMUNITY FEDERATION OF CLEVELAND 25701 SCIENCE PARK DRIVE CLEVELAND, OH 44122	NONE	PC	EDUCATIONAL SUPPORT/OUTREACH	350,000
KOLLELYCM 2573 LARCHMONT BLVD BEACHWOOD, OH 44122	NONE	PC	COMMUNITY OUTREACH	1,000
LIVING LEGACY 1980 SOUTH GREEN ROAD SOUTH EUCLID, OH 44121	NONE	PC	EDUCATIONAL SUPPORT	2,800
LUBAVITCH YOUNG ORGANIZATION 1368 PRESIDENT STREET BROOKLYN, NY 11213	NONE	PC	EDUCATIONAL SUPPORT	21,800
MATAN B'SAYER 3528 BLANCHE AVE CLEVELAND, OH 44118	NONE	PC	COMMUNITY OUTREACH	23,000
MENORAH PARK CENTER 27100 CEDAR ROAD BEACHWOOD, OH 44122	NONE	PC	COMMUNITY OUTREACH	50,000
MONTEFIORE HOME ONE DAVID N MEYERS PARKWAY BEACHWOOD, OH 44122	NONE	PC	COMMUNITY OUTREACH	10,000
MESIVTA YESHIVA RABBI CHAIM BERLIN 1605 CONEY ISLAND AVE BROOKLYN, OH 11230	NONE	PC	COMMUNITY OUTREACH	1,000
NCSY CENTRAL EAST REGION 16947 WEST 10 MILE ROAD SOUTHFIELD, MI 48075	NONE	PC	EDUCATIONAL SUPPORT	3,000
OHR TORAH STONE INSTITUTIONS 49 WEEST 45TH STREET 701 NEW YORK, NY 10036	NONE	PC	COMMUNITY OUTREACH	10,000
OPERATION OPEN CURTAIN 230 FIFTH AVE 1811 NEW YORK, NY 10001	NONE	PC	EDUCATIONAL SUPPORT	3,000
RIAS 2004 SOUTH GREEN ROAD CLEVELAND, OH 44121	NONE	PC	COMMUNITY OUTREACH	500
Total  3a				1,599,650

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>				
TEL AVIV UNIVERSITY 39 BROADWAY AVE 1510 NEW YORK, NY 10006	NONE	PC	EDUCATIONAL SUPPORT	5,500
UNION ORTHODOX JEWISH CONGREGATION OF AMERICA 11 BROADWAY AVE 1510 NEW YORK, NY 10004	NONE	PC	EDUCATIONAL SUPPORT	25,000
YESHIVA HAKOTEL PO BOX 603 JERUSALEM, ISRAEL 91006 IS	NONE	PC	EDUCATIONAL SUPPORT	7,000
YESHIVA UNIVERSITY 500 WEST 185TH STREET NEW YORK, NY 10033	NONE	PC	EDUCATIONAL SUPPORT	300,000
YESHIVA CHOVEVEI TORAH RABBINICAL SCHOOL 3700 HENRY HUDSON PARKWAY RIVERDALE, NY 10463	NONE	PC	EDUCATIONAL SUPPORT	5,000
YESHIVA HAREZION 111 GATEWAY PLACE 203 TEANECK, NJ 07666	NONE	PC	EDUCATIONAL SUPPORT	1,000
YESHIVAT HESDER AKKO PO BOX 499 AKKO, ISRAEL 24105 IS	NONE	PC	EDUCATIONAL SUPPORT	10,000
Total  3a				1,599,650

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.</div>	<div>OMB No 1545-0047</div> <div>2013</div>
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<div>Name of the organization</div> <div>IRVING I STONE FOUNDATION C/O MARY KAY INCANDELA</div>	<div>Employer identification number</div> <div>34-1892327</div>
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<div><input type="checkbox"/> 501(c)() (enter number) organization</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation</div> <div><input type="checkbox"/> 527 political organization</div>
Form 990-PF	<div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div> <div><input type="checkbox"/> 501(c)(3) taxable private foundation</div>

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization IRVING I STONE FOUNDATION C/O MARY KAY INCANDELA	Employer identification number 34-1892327
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Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____

Name of organization IRVING I STONE FOUNDATION C/O MARY KAY INCANDELA	Employer identification number 34-1892327
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Part III

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ▶ \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

TY 2013 Accounting Fees Schedule

Name: IRVING I STONE FOUNDATION

C/O MARY KAY INCANDELA

EIN: 34-1892327

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX RETURN PREPARATION	11,950	5,975		5,975

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2013 Depreciation Schedule

Name: IRVING I STONE FOUNDATION
C/O MARY KAY INCANDELA

EIN: 34-1892327

**TY 2013 Investments Corporate
Bonds Schedule**

Name: IRVING I STONE FOUNDATION
C/O MARY KAY INCANDELA
EIN: 34-1892327

Name of Bond	End of Year Book Value	End of Year Fair Market Value
KEYBANK BONDS 20102300529460	1,067,698	1,080,443

**TY 2013 Investments Corporate
Stock Schedule**

Name: IRVING I STONE FOUNDATION
C/O MARY KAY INCANDELA

EIN: 34-1892327

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AMERICAN GREETINGS STOCK	0	0
KEYBANK 20102300529460	7,612,594	11,557,218
VANGUARD FUNDS	1,969,478	4,767,995
BOTEL ASSET MGMT	1,024,593	1,034,238
NEUBERGER BERMAN	575,548	820,601

TY 2013 Investments - Land Schedule**Name:** IRVING I STONE FOUNDATION

C/O MARY KAY INCANDELA

EIN: 34-1892327

TY 2013 Investments - Other Schedule**Name:** IRVING I STONE FOUNDATION

C/O MARY KAY INCANDELA

EIN: 34-1892327

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ASCOT PARTNERS		2,769	0
PRIMUS CAPITAL FUND		425,144	478,939
SP CAPITAL PHIL OFFSHORE FUND		1,300,283	1,307,503
STERLING STAMOS LEVERED FUND		250,000	249,368
STERLING STAMOS GROWTH FUND		100,000	132,139
ARIEL FUND		193,893	209,637
GOLDMAN SACHS ASIA		29,654	22,610
GOLDMAN SACHS GSIP		1,000,000	1,189,138
GOLDMAN SACHS MEZZANINE		360,000	356,190
GOLDMAN SACHS LIQUIDITY		6,317	6,317

TY 2013 Land, Etc. Schedule**Name:** IRVING I STONE FOUNDATION

C/O MARY KAY INCANDELA

EIN: 34-1892327

TY 2013 Legal Fees Schedule**Name:** IRVING I STONE FOUNDATION

C/O MARY KAY INCANDELA

EIN: 34-1892327

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	10,667	8,000	8,000	2,667

TY 2013 Other Expenses Schedule**Name:** IRVING I STONE FOUNDATION

C/O MARY KAY INCANDELA

EIN: 34-1892327

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEES	85	85	85	
ASCOT PARTNERS	1,633	1,633	1,633	
OHIO FILING FEE	200			200
PRIMUS CAPITAL FUND VI	8,698	8,698	8,698	

TY 2013 Other Income Schedule**Name:** IRVING I STONE FOUNDATION

C/O MARY KAY INCANDELA

EIN: 34-1892327

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
AMERICAN MIDSTREAM			
ENTERPRISE PRODUCTS			
TARGA RESOURCES			
KINDER MORGAN			
ENERGY TRANSFER			
STERLING STAMOS - PFIC INCOME			
PRIMUS CAPITAL FUND VI			
INERGY			
ACCESS MIDSTREAM			
WESTERN GAS			
PAA NATURAL GAS			
SOUTHCROSS			
OILTANKING			
BREITBURN ENERGY			
PLAINS ALL AMERICAN			
NEUBERGER BERMAN			
APPLE			

TY 2013 Other Notes/Loans
Receivable Short Schedule

Name: IRVING I STONE FOUNDATION
C/O MARY KAY INCANDELA
EIN: 34-1892327

Name of 501(c)(3) Organization	Balance Due
AG STOCK LOAN	14,205,652

TY 2013 Other Professional Fees Schedule

Name: IRVING I STONE FOUNDATION
C/O MARY KAY INCANDELA
EIN: 34-1892327

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT- KEYBANK				

TY 2013 Substantial Contributors Schedule

Name: IRVING I STONE FOUNDATION

C/O MARY KAY INCANDELA

EIN: 34-1892327

Name	Address
IRVING STONE OVERSIGHT TRUST	ONE AMERICAN ROAD CLEVELAND, OH 44144

TY 2013 Taxes Schedule**Name:** IRVING I STONE FOUNDATION

C/O MARY KAY INCANDELA

EIN: 34-1892327

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	50,000	50,000	50,000	
FOREIGN TAXES	649	649	649	

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2013 ShareholdersStockOwnershipStmt

Name: IRVING I STONE FOUNDATION
C/O MARY KAY INCANDELA
EIN: 34-1892327

Class of Stock Owned by the Shareholder at the Beginning of its Tax Year	Number of Shares Owned by the Shareholder at the Beginning of its Tax Year	Change to the Number of Shares Owned	Date of Changes	Number of Shares at End of Year
CLASS A	395			395