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Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2013

Open to Public Inspection

Department of the Treasury
Internal Revenue ServiceDo not enter Social Security numbers on this form as it may be made public
Information about Form 990 PF and its separate instructions is at www.irs.gov/form990pf**For calendar year 2013 or tax year beginning****and ending**

Name of foundation
STUTZMAN FAMILY FOUNDATION

Number and street (or P O box number if mail is not delivered to street address) Room/suite
C/O BNY Mellon, N.A P O Box 185

City or town State ZIP code
Pittsburgh PA 15230 0185

Foreign country name Foreign province/state/county Foreign postal code

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☒ Address change ☐ Name change

H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II col (c) line 16) **\$ 13,138,526** **J** Accounting method ☒ Cash ☐ Accrual
☐ Other (specify)

A Employer identification number
34 7218543

B Telephone number (see instructions)
(239) 919 5503

C If exemption application is pending check here ☐

D 1 Foreign organizations check here ☐
2 Foreign organizations meeting the 85% test check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A) check here ☐

F If the foundation is in a 60 month termination under section 507(b)(1)(B) check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b) (c) and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions gifts grants etc received (attach schedule)	2,331,807			
	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	230,444	229,390		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	910,904			
	b Gross sales price for all assets on line 6a 9 920,821				
	7 Capital gain net income (from Part IV line 2)		910,904		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	4,041	4,041		
	12 Total Add lines 1 through 11	3,477,196	1,144,335	0	
	13 Compensation of officers directors trustees etc	57,273	28,636		28,636
	14 Other employee salaries and wages				
	15 Pension plans employee benefits				
	16a Legal fees (attach schedule)	7,246			7,246
	b Accounting fees (attach schedule)	2,075			2,075
	c Other professional fees (attach schedule)	76,116	76,116		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	18,600	5,789		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel conferences and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	433	433		
	24 Total operating and administrative expenses Add lines 13 through 23	161,743	110,974	0	37,957
	25 Contributions gifts grants paid	313,750			313,750
	26 Total expenses and disbursements Add lines 24 and 25	475,493	110,974	0	351,707
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	3,001,703			
	b Net investment income (if negative enter 0)		1,033,361		
	c Adjusted net income (if negative enter 0-)			0	

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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				
	2	Savings and temporary cash investments	364,705	2,131,516	2,131,516	
	3	Accounts receivable				
		Less allowance for doubtful accounts				
	4	Pledges receivable				
		Less allowance for doubtful accounts				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule)				
		Less allowance for doubtful accounts				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)	7,868,491	9,080,310	11,007,010	
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment basis				
	Less accumulated depreciation (attach schedule)					
12	Investments—mortgage loans					
13	Investments—other (attach schedule)					
14	Land, buildings, and equipment basis					
	Less accumulated depreciation (attach schedule)					
15	Other assets (describe)					
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	8,233,196	11,211,826	13,138,526		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe)				
	23	Total liabilities (add lines 17 through 22)	0	0		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	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		11,211,826		
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds	8,233,196			
	30	Total net assets or fund balances (see instructions)	8,233,196	11,211,826		
31	Total liabilities and net assets/fund balances (see instructions)	8,233,196	11,211,826			

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	8,233,196
2	Enter amount from Part I, line 27a	2	3,001,703
3	Other increases not included in line 2 (itemize) <u>See Attached Statement</u>	3	125,017
4	Add lines 1, 2, and 3	4	11,359,916
5	Decreases not included in line 2 (itemize) <u>GAIN ON CY SALES NOT SETTLED AT YEAR END</u>	5	148,090
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	11,211,826

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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 Attached Statement			
b	See Attached Statement			
c	See Attached Statement			
d	See Attached Statement			
e	See Attached Statement			

(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			0
b			0
c			0
d			0
e			0

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			0
b			0
c			0
d			0
e			0

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	910,904
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	0

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

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

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

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

☐ Yes ☒ No

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	333,080	9,166,920	0.036335
2011	416,540	5,972,647	0.069741
2010	787,050	2,612,764	0.301233
2009	280,020	2,276,634	0.122997
2008	177,659	71,677	2.478605

2 Total of line 1, column (d)	2	3.008911
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	0.601782
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	11,849,673
5 Multiply line 4 by line 3	5	7,130,920
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	10,334
7 Add lines 5 and 6	7	7,141,254
8 Enter qualifying distributions from Part XII, line 4	8	351,707

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.

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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	20,667	
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	20,667	
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	20,667	
6	Credits/Payments			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	7,454	
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	7,454	
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	13,213	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	0	
11	Enter the amount of line 10 to be: Credited to 2014 estimated tax ☐ Refunded ☐	11	0	

Part VII-A Statements Regarding Activities

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

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ▶ N/A				
14	The books are in care of ▶ BNY MELLON, N A Telephone no ▶ (239) 919-5503			
Located at ▶ P.O. BOX 185, PITTSBURGH, PA ZIP+4 ▶ 15230-0185				
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 N/A			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ▶				X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly).		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ▶ ☐	1b	X
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 ▶ 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	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 ▶ 20 20 20 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (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

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
ANDREW KRAUSE C/O STUTZMAN FOUNDATION	TRUSTEE 5 00	57,273	NONE	NONE
WALTER STUTZMAN C/O STUTZMAN FOUNDATION	TRUSTEE 5 00	0	NONE	NONE

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				NONE

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 ► NONE

Part IX-A Summary of Direct Charitable Activities

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

Expenses

1 NONE	
2	
3	
4	

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

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

Amount

1 NONE	
2	
All other program-related investments See instructions	
3 NONE	

Total. Add lines 1 through 3 ► NONE

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	11,267,838
b	Average of monthly cash balances	1b	762,287
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	12,030,125
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	12,030,125
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	180,452
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	11,849,673
6	Minimum investment return. Enter 5% of line 5	6	592,484

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	592,484
2a	Tax on investment income for 2013 from Part VI, line 5	2a	20,667
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	20,667
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	571,817
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	571,817
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	571,817

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	351,707
b	Program-related investments—total from Part IX-B	1b	NONE
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	351,707
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	351,707

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				571,817
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013.				
a From 2008	57,288			
b From 2009	166,683			
c From 2010	658,559			
d From 2011	120,005			
e From 2012				
f Total of lines 3a through e	1,002,535			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 351,707				
a Applied to 2012, but not more than line 2a				
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				351,707
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))	220,110			220,110
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	782,425			
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				
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)				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	782,425			
10 Analysis of line 9:				
a Excess from 2009	3,861			
b Excess from 2010	658,559			
c Excess from 2011	120,005			
d Excess from 2012				
e Excess from 2013				

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

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

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

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

Tax year	Prior 3 years			(e) Total
(a) 2013	(b) 2012	(c) 2011	(d) 2010	
				0
b 85% of line 2a				0
c Qualifying distributions from Part XII, line 4 for each year listed				0
d Amounts included in line 2c not used directly for active conduct of exempt activities				0
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				0
3 Complete 3a, b, or c for the alternative test relied upon				
a "Assets" alternative test—enter:				
(1) Value of all assets				0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				0
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed				0
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)				0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				0
(3) Largest amount of support from an exempt organization				0
(4) Gross investment income				0

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

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

NONE

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

NONE

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

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

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

NOT APPLICABLE

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

NOT APPLICABLE

- c** Any submission deadlines:

NOT APPLICABLE

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

NOT APPLICABLE

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 <i>Paid during the year</i> See Attached Statement				
Total			3a	313,750
b <i>Approved for future payment</i> NONE				
Total			3b	NONE

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities			14	230,444		
5 Net rental income or (loss) from real estate						
a Debt-financed property						
b Not debt-financed property						
6 Net rental income or (loss) from personal property						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory			18	910,904		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue a <u>OTHER TAXABLE INCOME</u>				4,041		
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)		0		1,145,389		0
13 Total. Add line 12, columns (b), (d), and (e)				13		1,145,389

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Schedule B
(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

OMB No 1545-0047

2013▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.**Name of the organization**

STUTZMAN FAMILY FOUNDATION

Employer identification number

34-7218543

Organization type (check one)**Filers of:****Section:**

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck 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 33 1/3% 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 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 to 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 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Employer identification number

34-7218543

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	STUTZMAN CHARITABLE LEAD TRUST 800 LAUREL OAK DR, STE 600 NAPLES FL 34108 Foreign State or Province Foreign Country	\$ 2,331,807	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-----	----- ----- Foreign State or Province: ----- Foreign Country. -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-----	----- ----- Foreign State or Province ----- Foreign Country -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-----	----- ----- Foreign State or Province ----- Foreign Country -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-----	----- ----- Foreign State or Province ----- Foreign Country -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-----	----- ----- Foreign State or Province ----- Foreign Country -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-----	----- ----- Foreign State or Province ----- Foreign Country -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization STUTZMAN FAMILY FOUNDATION	Employer identification number 34-7218543
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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
-----	----- ----- ----- -----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----

Name of organization STUTZMAN FAMILY FOUNDATION	Employer identification number 34-7218543
--	--

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations 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.) ► \$ 0

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
-----	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----		----- ----- -----
	For Prov	Country	
-----	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----		----- ----- -----
	For Prov	Country	
-----	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----		----- ----- -----
	For Prov	Country	
-----	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----		----- ----- -----
	For Prov	Country	

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Part I, Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

			Amount						Totals	Gross Sales		Cost, Other Basis and Expenses		Net Gain or Loss	
Long Term CG Distributions			189,897						Capital Gains/Losses	9,920,821		9,009,917		910,904	
Short Term CG Distributions									Other sales	0		0		0	
Check "X" to include in Part IV	Description	CUSIP #	Purchaser	Check "X" if Purchaser is a Business	Date Acquired	Acquisition Method	Date Sold	Gross Sales Price	Cost or Other Basis	Valuation Method	Expense of Sale and Cost of Improvements	Depreciation	Adjustments	Net Gain or Loss	
1	X	PIMCO DEVELOPING LOCAL	72201F409		4/24/2013		12/26/2013	131,131	138,006				0	-6,875	
2	X	RS GLOBAL NATURAL RESOL	74972H848		4/24/2013		12/26/2013	258,531	273,202				0	-14,671	
3	X	RS GLOBAL NATURAL RESOL	74972H848		12/19/2013		12/26/2013	9,835	9,568				0	269	
4	X	TEMPLETON GLOBAL BOND F	880208400		4/22/2013		12/26/2013	130,485	135,488				0	-5,003	
5	X	ETRACS ALERIAN INFRASTRU	902841848		4/22/2013		12/26/2013	139,626	136,458				0	3,168	
6	X	ETRACS ALERIAN INFRASTRU	902841848		2/6/2013		12/26/2013	23,625	21,745				0	1,880	
7	X	COLUMBIA ACORN SELECT F	197199854		3/24/2010		12/26/2013	215,812	205,350				0	10,432	
8	X	COLUMBIA ACORN SELECT F	197199854		12/11/2013		12/26/2013	46,831	44,614				0	2,017	
9	X	COLUMBIA SHORT TERM BON	19765H362		6/15/2009		12/26/2013	128,872	124,891				0	3,881	
10	X	COLUMBIA COMMON STOCK	19785P408		6/15/2009		12/31/2013	125,000	62,045				0	62,955	
11	X	COLUMBIA LARGE CAP GROV	19785Y888		6/15/2009		12/31/2013	150,000	64,865				0	85,135	
12	X	HARBOR FD INTL FD	411511306		7/1/2011		12/26/2013	21,277	19,952				0	1,325	
13	X	HARBOR FD INTL FD	411511306		7/8/2011		12/26/2013	9,742	9,000				0	742	
14	X	HARBOR FD INTL FD	411511306		12/17/2013		12/26/2013	686	662				0	24	
15	X	KALMAR POOLED INVT TR SM	483438206		7/1/2011		12/26/2013	25,016	20,000				0	5,016	
16	X	KALMAR POOLED INVT TR SM	483438206		7/8/2011		12/26/2013	6,175	4,999				0	1,176	
17	X	KALMAR POOLED INVT TR SM	483438206		2/26/2013		12/26/2013	60,312	45,000				0	15,312	
18	X	MAINSTAY EPOCH GLOBAL E	56063J864		4/24/2013		12/26/2013	863,435	814,748				0	48,687	
19	X	MAINSTAY EPOCH GLOBAL E	56063J864		12/9/2013		12/26/2013	5,302	5,220				0	82	
20	X	MARKET VECTORS AGRIBUS	57080U605		4/22/2013		12/26/2013	139,622	135,464				0	4,158	
21	X	PIMCO COMMODITY RR STRA	722005967		2/6/2013		12/26/2013	480,067	587,996				0	-107,929	
22	X	PIMCO DEVELOPING LOCAL	72201F409		2/26/2013		12/26/2013	143,744	150,000				0	-6,256	
23	X	PIMCO DEVELOPING LOCAL	72201F409		4/22/2013		12/26/2013	128,716	135,463				0	-6,747	
24	X	UNDISC MGRS BEHAV VAL IN	904504842		4/22/2013		12/26/2013	422,429	338,667				0	83,762	
25	X	UNDISC MGRS BEHAV VAL IN	904504842		12/20/2013		12/26/2013	2,681	2,656				0	25	
26	X	WISDOMTREE EMG MKTS HN	97717W315		4/24/2013		12/26/2013	831,510	680,426				0	-151,084	
27	X	WISDOMTREE JAPAN HEDGE	97717W851		4/22/2013		12/26/2013	143,555	135,262				0	8,293	
28	X	BGA - S/T GAIN FROM SALES	SEE ATTACHED					112,783	100,363					12,420	
29	X	BGA - LT GAIN FROM SALES	SEE ATTACHED					4,522,183	3,932,849					589,334	
30	X	FIDELITY - S/T GAIN FROM SA	SEE ATTACHED					219,791	213,038					6,753	
31	X	FIDELITY - LT GAIN FROM SA	SEE ATTACHED					655,410	651,612					3,798	

Bank of America – Sales Detail

Date	Description	Cash	Tax Cost	Short-term Realized Gain/Loss	Long-term Realized Gain/Loss
Series and Maturities					
01/17/13	POWERSHARES DDO TR UNIT SER 1 LAZARD FRERES & CO 01/14 SALE 15,500.00 SHRS @ 67.010000 MISC 23.27 COMM 465.00	\$1,038,166.73	-\$901,231.45		\$136,335.28
02/07/13	COLUMBIA ACORN SELECT FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 739,071 UNITS @ 27.4400	\$20,280.11	-\$21,000.00		-\$719.89
04/23/13	COLUMBIA SHORT TERM BOND FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 18,649,025 UNITS @ 10.0199	\$185,893.23	-\$185,371.31		\$1,491.92
04/23/13	COLUMBIA SMALL CAP GROWTH I FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 8,323,780 UNITS @ 29.5000	245,551.51	-179,146.81		66,404.70
04/23/13	JANUS ENTERPRISE FUND CL I MUTUAL FUND AGENT PROCEEDS REDEMPTION 1,859,588 UNITS @ 71.1899	131,708.34	-92,111.32		39,595.02
04/23/13	JOHN HANCOCK FDS III INTL GROWTH FUND CL I MUTUAL FUND AGENT PROCEEDS REDEMPTION 30,277,011 UNITS @ 21.9000	652,925.14	-484,392.77		198,542.37
04/23/13	ISHOR MSCI JAPAN INDEX FUND CS FIRST BOSTON 04/22 SALE 10,000.00 SHRS @ 11.3001000 MISC 2.54 COMM 320.00	112,693.46	-100,300.00	12,598.46	

Bank of America - Sales Detail

Date	Description	Cash	Tax Cost	Short-term Realized Gain/Loss	Long-term Realized Gain/Loss
Sales and Maturities					
04/25/13	ISHARES MSCI EAFE INDEX FUND BARCLAYS CAPITAL LE 04/22 SALE 5,000.00 SHRS @ 59.2416000 MSCI EAFE COMD 125.00	298,076.38	-308,100.00		-12,023.64
04/25/13	JANUS ENTERPRISE FUND CL 1 MUTUAL FUND AGENT PROCEEDS REDEMPTION 2,652.285 UNITS @ 71.8600	278,833.13	-143,841.50		135,191.63
04/25/13	ISHARES MSCI EMERGING MKTS INDEX FUND CS FIRST BOSTON 04/24 SALE 8,400.00 SHRS @ 42.340000 MSCI EME COMD 100.50	271,883.82	-213,530.80		58,153.02
04/25/13	VANGUARD FTSE EMERGING MKTS ETF WFOED N AND CO 04/24 SALE 12,115.00 SHRS @ 42.850000 MSCI EME COMD 100.50	544,447.51	-536,252.17		-51,844.26
05/17/13	COLUMBIA CONTRARIAN CORE FUND CLASS Z SHARES FORMERLY COLUMBIA COMMON STOCK FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 525.210 UNITS @ 19.0400	\$10,000.00	\$7,335.92		\$2,064.08
05/22/13	COLUMBIA ACORN SELECT FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 333.778 UNITS @ 29.9600	10,000.00	-8,411.21		1,568.79
05/22/13	COLUMBIA SHORT TERM BOND FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 1,998.002 UNITS @ 10.0059	20,000.00	19,860.14		139.86
05/22/13	COLUMBIA CONTRARIAN CORE FUND CLASS Z SHARES FORMERLY COLUMBIA COMMON STOCK FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 1,037.344 UNITS @ 19.2500	20,000.00	-15,674.27		4,325.73

Bank of America – Sales Detail

Date	Description	Cash	Tax Cost	Short-term Realized Gain/Loss	Long term Realized Gain/Loss
Sales and Maturities					
09/25/13	COLUMBIA SHORT TERM BOND FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 79,223.185 UNITS @ 9.9400	\$787,478.26	\$776,035.61		\$11,442.65
09/12/13	COLUMBIA SHORT TERM BOND FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 959 UNITS @ 9.9000	9.52	-9.26		0.26
09/12/13	COLUMBIA CONTRARIAN CORE FUND CLASS Z SHARES FORMERLY COLUMBIA COMMON STOCK FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 800 UNITS @ 19.9900	12.15	-9.39		2.76
09/12/13	COLUMBIA SELECT LARGE CAP GROWTH FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION .005 UNITS @ 18.0000	0.09	-0.07		0.02
09/12/13	HARBOR INTERNATIONAL FUND INSTL CL MUTUAL FUND AGENT PROCEEDS REDEMPTION 724 UNITS @ 68.4000	49.52	-47.54		1.98
09/12/13	KALMAR POOLED INVT TR SMALL CAP GROWTH-WITH-VALUE FUND MUTUAL FUND AGENT PROCEEDS REDEMPTION .049 UNITS @ 20.8700	1.02	-0.90		0.12
09/12/13	PIMCO EMERGING MKT CURRENCY FUND INSTL MUTUAL FUND AGENT PROCEEDS REDEMPTION .009 UNITS @ 10.0700	0.09	-0.09		

Bank of America – Sales Detail

Date	Description	Cash	Tax Cost	Short-term Realized Gain/Loss	Long-term Realized Gain/Loss
Sales and Redemptions					
09/12/13	COLUMBIA ACORN SELECT FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 763 UNITS @ 23.600	\$22.61	\$19.23		\$3.38
09/12/13	COLUMBIA CONTRARIAN CORE FUND CLASS Z SHARES FORMERLY COLUMBIA COMMON STOCK FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 229 UNITS @ 19.900	4.58	-3.45		1.12
09/12/13	COLUMBIA SELECT LARGE CAP GROWTH FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 914 UNITS @ 18.000	16.45	12.47		3.98
09/12/13	JANUS ENTERPRISE FUND CLASS I MUTUAL FUND AGENT PROCEEDS REDEMPTION 313 UNITS @ 80.100	25.07	11.62		13.45
09/12/13	MAINSTAY EPOCH GLOBAL EQUITY YIELD FUND I MUTUAL FUND AGENT PROCEEDS REDEMPTION 345 UNITS @ 18.320	6.32	-6.19	0.13	
09/12/13	PIMCO COMMODITY REALRETURN STRATEGY FUND MUTUAL FUND AGENT PROCEEDS REDEMPTION 612 UNITS @ 5.700	3.49	4.17	-0.68	
09/12/13	PIMCO EMERGING MKT CURRENCY FUND INSTL MUTUAL FUND AGENT PROCEEDS REDEMPTION 887 UNITS @ 10.000	8.93	-9.44	-0.51	

Bank of America – Sales Detail

Date	Description	Cash	Tax Cost	Short-term Realized Gain/Loss	Long-term Realized Gain/Loss
Sales and Maturities					
09/12/13	RS GLOBAL NATURAL RES FUND CL Y MUTUAL FUND AGENT PROCEEDS REDEMPTION 601 UNITS @ 36.7300	23.28	-22.50	0.78	
09/12/13	TEMPLETON GLOBAL 80 FUND ADVISOR CL MUTUAL FUND AGENT PROCEEDS REDEMPTION 384 UNITS @ 12.9500	4.97	5.20	-0.23	
09/12/13	UNDISCOVERED MANAGERS FDS BEHAVIORAL VALUE PD INSTL CL MUTUAL FUND AGENT PROCEEDS REDEMPTION 356 UNITS @ 48.3800	17.22	15.33	1.89	
Total Sales and Maturities		\$4,634,926.31	-\$4,033,212.14	\$12,399.84	\$589,314.33

Part I, Line 11 (990-PF) - Other Income

		4,041	4,041	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income
1	ETRACS ALERIAN INFRASTRUCTURE - BNY	1,896	1,896	
2	ETRACS ALERIAN INFRASTRUCTURE - BOA	2,145	2,145	

Part I, Line 16a (990-PF) - Legal Fees

		7,246	0	0	7,246
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	LEGAL FEES - CHARITABLE	7,246			7,246

Part I, Line 16b (990-PF) - Accounting Fees

		2,075	0	0	2,075
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	TAX PREPARATION FEE - BOA	2,075			2,075

Part I, Line 16c (990-PF) - Other Professional Fees

		76,116	76,116	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	INVESTMENT MGMT FEES - BNY	9,917	9,917		
2	INVESTMENT MGMT FEES - BOA	19,809	19,809		
3	ADVISOR FEES - FIDELITY	46,390	46,390		

Part I, Line 18 (990-PF) - Taxes

		18,600	5,789	0	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	FOREIGN TAX WITHHELD	5,789	5,789		
2	PY EXCISE TAX DUE	5,357			
3	ESTIMATED EXCISE PAYMENTS	7,454			

Part I, Line 23 (990-PF) - Other Expenses

		433	433	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	OTHER INVESTMENT FEES - BOA	278	278		
2	OTHER INVESTMENT FEES - FIDELITY	155	155		

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Part II, Line 10b (990-PF) - Investments - Corporate Stock

			7,868,491	9,080,310	0	11,007,010
	Description	Num Shares/ Face Value	Book Value Beg of Year	Book Value End of Year	FMV Beg of Year	FMV End of Year
1	PY ENDING BV		7,868,491			
2	OTHER INVESTMENTS			9,080,310		11,007,010

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Account Name	Report Year	Report Month	Cusip ID	Asset Description	Portfolio Type	No. of Shares	Market Value	Federal Tax Cost Amount	Book Value
STUTZMAN FAM FDN DTD 7-17-07-NON DIS	2013	12	19765P406	COLUMBIA COMMON STOCK-Z	Principal	57130 13	1177452 06	708157 69	708157 69
STUTZMAN FAM FDN DTD 7-17-07-NON DIS	2013	12	19765Y688	COLUMBIA LARGE CAP GROWTH-Z	Principal	63110 27	1214241 63	643413 49	643413 49
STUTZMAN FAM FDN DTD 7-17-07-NON DIS	2013	12	46429B655	ISHARES FLOATING RATE BOND ETF	Principal	12995	659106 4	658586 6	657936 85
STUTZMAN FAM FDN DTD 7-17-07-NON DIS	2013	12	47103C795	JANUS ENTERPRISE-I	Principal	3004 26	246980 46	117053 39	117053 39
STUTZMAN FAM FDN DTD 7-17-07-NON DIS	2013	12	921908844	VANGUARD DIVIDEND APPREC ETF	Principal	5835	439025 4	369875 7	397538 55
STUTZMAN FAM FDN DTD 7-17-07-NON DIS	2013	12	991061052	CRA (BNY MELLON, N A., MEMBER FDIC)	Principal	1556214 32	1556214 32	1556214 32	1556214 32
STUTZMAN FAM FDN DTD 7-17-07-NON DIS	2013	12	991061052	CRA (BNY MELLON, N A., MEMBER FDIC)	Invested Income	33966 45	33966 45	33966 45	33966 45
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	001084102	AGCO CORP	Principal	50	2959 5	2924 4	2924 4
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	00206R102	AT&T INC	Principal	770	27073 2	26909 96	26909 96
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	002824100	ABBOTT LABORATORIES	Principal	440	16865 2	16837 79	16837 79
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	00287Y109	ABBVIE INC	Principal	120	6337 2	6322 56	6322 56
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	00766T100	AECOM TECHNOLOGY CORP	Principal	310	9123 3	9136 57	9136 57
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	018490102	ALLERGAN INC	Principal	140	15551 2	15196 01	15196 01
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	02209S103	ALTRIA GROUP INC	Principal	460	17659 4	17566 48	17566 48
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	031162100	AMGEN INC	Principal	165	18823 2	18600 12	18600 12
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	032511107	ANADARKO PETROLEUM CORP	Principal	160	12691 2	12540 48	12540 48
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	037833100	APPLE INC	Principal	55	30856 1	31217 69	31217 69
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	039483102	ARCHER DANIELS MIDLAND CO	Principal	280	12152	12153 23	12153 23
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	06050S104	BANK OF AMERICA CORP	Principal	1430	22265 1	22476 74	22476 74
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	084670702	BERKSHIRE HATHAWAY INC DEL CL B	Principal	250	29640	29301 75	29301 75
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	097023105	BOEING CO	Principal	56	7643 44	7635 46	7635 46
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	124857202	C S S CORP-CLASS B	Principal	250	15935	15402	15402
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	126408103	C S X CORP	Principal	120	3452 4	3402 96	3402 96
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	126650100	CVS CAREMARK CORP	Principal	270	19323 9	19193 76	19193 76
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	151020104	CELGENE CORP	Principal	110	18586 48	18345 16	18345 16
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	156700106	CENTURYLINK INC	Principal	150	4777 5	4762 2	4762 2
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	165167107	CHESAPEAKE ENERGY CORP	Principal	420	11398 8	11561 76	11561 76
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	166764100	CHEVRON CORPORATION	Principal	66	8244 06	8141 63	8141 63
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	17275R102	CISCO SYSTEMS INC	Principal	800	17944	17366 08	17366 08
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	172967424	CITIGROUP INC	Principal	450	23449 5	23570 1	23570 1
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	191216100	COCA - COLA CO	Principal	70	2891 7	2810 94	2810 94
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	20030N101	COMCAST CORP CL A	Principal	460	23903 9	23468 28	23468 28
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	20825C104	CONOCOPHILLIPS	Principal	260	18369	18165 68	18165 68
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	22025Y407	CORRECTIONS CORP AMER NEW	Principal	300	9621	9710 85	9710 85
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	222816100	COVANCE INC	Principal	80	7044 8	6982 49	6982 49
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	247916208	DENBURY RES INC NEW	Principal	160	2628 8	2623 68	2623 68
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	254687106	WALT DISNEY CO/THE	Principal	310	23684	22808 15	22808 15
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	260543103	DOW CHEMICAL CO	Principal	70	3108	3103 66	3103 66
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	26884L109	E Q T CORP	Principal	110	9875 8	9875 26	9875 26
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	281020107	EDISON INTERNATIONAL	Principal	230	10649	10720 34	10720 34
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	291011104	EMERSON ELECTRIC CO	Principal	50	3509	3484 4	3484 4
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	29266R108	ENERGIZER HLDGS INC	Principal	109	11798 16	11741 26	11741 26
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	30231G102	EXXON MOBIL CORP	Principal	490	49588	48668 17	48668 17
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	343412102	FLUOR CORP NEW	Principal	50	4014 5	3969 9	3969 9
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	354613101	FRANKLIN RES INC	Principal	250	14432 5	14182	14182
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	364760108	GAP INC	Principal	300	11724	11609 4	11609 4
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	369604103	GENERAL ELECTRIC CO	Principal	1020	28590 6	28139 66	28139 66
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	38259P508	GOOGLE INC - CL A	Principal	37	41466 27	41103 41	41103 41
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12	393122106	GREEN MOUNTAIN COFFEE ROASTE	Principal	160	12086 4	11964 48	11964 48

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STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 410345102	HANESBRANDS INC	Principal	190	13351 3	13128 35	13128 35
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 427866108	HERSHEY CO	Principal	110	10695 3	10564 18	10564 18
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 428236103	HEWLETT PACKARD CO	Principal	620	17347 6	17451 64	17451 64
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 432589109	HILLSHIRE BRANDS CO	Principal	300	10032	9983 4	9983 4
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 437076102	HOME DEPOT INC	Principal	260	21408 4	20985 72	20985 72
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 438516106	HONEYWELL INTL INC	Principal	50	4568 5	4514 4	4514 4
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 458140100	INTEL CORP	Principal	230	5969 65	5892 14	5892 14
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 459200101	INTERNATIONAL BUSINESS MACHINES CORP	Principal	149	27947 93	27227 96	27227 96
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 461202103	INTUIT	Principal	160	12211 2	12241 82	12241 82
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 46625H100	JP MORGAN CHASE & CO	Principal	90	5263 2	5239 62	5239 62
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 478160104	JOHNSON & JOHNSON	Principal	360	32972 4	33076 33	33076 33
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 501044101	KROGER CO	Principal	80	3162 4	3183 04	3183 04
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 512807108	LAM RESH CORP	Principal	50	2722 5	2713 9	2713 9
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 517834107	LAS VEGAS SANDS CORP	Principal	50	3943 5	3885 9	3885 9
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 532457108	LILLY ELI & CO	Principal	280	14280	14212 24	14212 24
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 548661107	LOWE'S COMPANIES INC	Principal	300	14865	14603 52	14603 52
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 55616P104	MACY'S INC	Principal	60	3204	3160 68	3160 68
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 56585A102	MARATHON PETROLEUM CORP	Principal	190	17428 7	16879 22	16879 22
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 574599106	MASCO CORP	Principal	530	12068 1	12093 54	12093 54
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 57636Q104	MASTERCARD INC-CLASS A	Principal	15	12531 9	12196 55	12196 55
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 58155Q103	MCKESSON CORPORATION	Principal	23	3712 2	3692 03	3692 03
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 585055106	MEDTRONIC INC	Principal	280	16069 2	16055 17	16055 17
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 592688105	METTLER TOLEDO INTL INC	Principal	39	9461 01	9478 86	9478 86
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 594918104	MICROSOFT CORPORATION	Principal	290	10848 9	10758 42	10758 42
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 61166W101	MONSANTO CO NEW	Principal	49	5710 95	5608 44	5608 44
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 615369105	MOODY'S CORP	Principal	40	3138 8	3099 92	3099 92
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 64110D104	NETAPP INC	Principal	280	11519 2	11305 84	11305 84
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 64126X201	NEUSTAR INC-CLASS A	Principal	130	6481 8	6510 14	6510 14
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 65339F101	NEXTERA ENERGY INC	Principal	90	7705 8	7625 52	7625 52
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 666807102	NORTHROP GRUMMAN CORP	Principal	132	15128 52	15012 1	15012 1
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 68389X105	ORACLE CORP	Principal	670	25634 2	24969 56	24969 56
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 688239201	OSHKOSH CORPORATION	Principal	190	9572 2	9590 82	9590 82
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 693506107	P P G INDUSTRIES INC	Principal	17	3224 22	3181 34	3181 34
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 695156109	PACKAGING CORP AMER	Principal	190	12023 2	11955 58	11955 58
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 713448108	PEPSICO INC	Principal	260	21564 4	21284 07	21284 07
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 717081103	PFIZER INC	Principal	950	29098 5	28811 41	28811 41
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 718546104	PHILLIPS 66	Principal	230	17739 9	17178 01	17178 01
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 74144T108	T ROWE PRICE GROUP INC	Principal	140	11727 8	11640 72	11640 72
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 742718109	PROCTER & GAMBLE CO	Principal	370	30121 7	30150 56	30150 56
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 74460D109	PUBLIC STORAGE INC REIT	Principal	76	11439 52	11499 41	11499 41
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 745867101	PULTE GROUP INC	Principal	520	10592 4	10362 56	10362 56
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 773903109	ROCKWELL AUTOMATION, INC	Principal	23	2717 68	2688 89	2688 89
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 78442P106	SLM CORP	Principal	470	12351 6	12284 72	12284 72
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 80004C101	SANDISK CORP	Principal	190	13402 6	13368 02	13368 02
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 806857108	SCHLUMBERGER LTD	Principal	40	3604 4	3535 52	3535 52
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 810186106	THE SCOTT'S MIRACLE-GRO COMPANY	Principal	190	11821 8	11811 92	11811 92
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 828806109	SIMON PROPERTY GROUP INC REIT	Principal	89	13542 24	13652 03	13652 03
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 82966C103	SIRONA DENTAL SYSTEMS INC	Principal	40	2808	2807 72	2807 72
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 85590A401	STARWOOD HOTELS & RESORTS WORLDWIDE	Principal	40	3178	3166 72	3166 72
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 857477103	STATE STREET CORP	Principal	190	13944 1	13729 37	13729 37

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STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 863667101	STRYKER CORP	Principal	170	12773 8	12766 66	12766 66
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 871503108	SYMANTEC CORP	Principal	550	12969	12593 13	12593 13
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 87612E106	TARGET CORP	Principal	220	13919 4	13529 01	13529 01
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 887317303	TIME WARNER INC	Principal	40	2788 8	2765 01	2765 01
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 89417E109	THE TRAVELERS COMPANIES INC	Principal	160	14486 4	14290 08	14290 08
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 902494103	TYSON FOODS INC CLASS A	Principal	60	2007 6	2005 68	2005 68
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 902681105	U G I CORP NEW	Principal	90	3731 4	3707 82	3707 82
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 907818108	UNION PAC CORP	Principal	107	17976	17680 28	17680 28
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 917047102	URBAN OUTFITTERS INC	Principal	70	2597	2584 96	2584 96
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 920253101	VALMONT INDUSTRIES INC	Principal	77	11482 24	11391 23	11391 23
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 92343V104	VERIZON COMMUNICATIONS INC	Principal	470	23095 8	22963 26	22963 26
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 931142103	WAL MART STORES INC	Principal	190	14951 1	14825 05	14825 05
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 94973V107	WELLPOINT INC	Principal	150	13858 5	13694 7	13694 7
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 949746101	WELLS FARGO & COMPANY	Principal	560	25424	25428 31	25428 31
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 963320106	WHIRLPOOL CORP	Principal	22	3450 92	3453 3	3453 3
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 98310W108	WYNDHAM WORLDWIDE CORP	Principal	190	14001 1	13833 36	13833 36
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 991061052	CRA (BNY MELLON, N A., MEMBER FDIC)	Principal	31050 04	31050 04	31050 04	31050 04
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 G1151C101	ACCENTURE PLC-CL A	Principal	200	16444	16239 6	16239 6
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 G3157S106	ENSCO PLC-CL A	Principal	50	2859	2798 9	2798 9
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 G7945M107	SEAGATE TECHNOLOGY	Principal	60	3369 6	3374 54	3374 54
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 G98290102	XL GROUP PLC	Principal	340	10825 6	10722 92	10722 92
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 H84989104	T E CONNECTIVITY LTD	Principal	250	13777 5	13596 82	13596 82
STUTZMAN FAM FDN-NON DIS-LG CORE-SUB	2013	12 N53745100	LYONDELLBASELL INDU -CL A	Principal	50	4014	3958 9	3958 9
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 00724F101	ADOBE SYSTEMS INC	Principal	160	9580 64	9500 48	9500 48
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 031162100	AMGEN INC	Principal	70	7985 6	7890 95	7890 95
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 037833100	APPLE INC	Principal	23	12903 46	13054 67	13054 67
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 110122108	BRISTOL-MYERS SQUIBB CO	Principal	240	12756	12745 92	12745 92
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 149123101	CATERPILLAR INC	Principal	90	8172 9	8170 92	8170 92
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 150870103	CELANESE CORP -SER A	Principal	150	8296 5	8321 7	8321 7
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 260003108	DOVER CORP	Principal	100	9654	9556 8	9556 8
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 38259P508	GOOGLE INC CL A	Principal	11	12327 81	12219 93	12219 93
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 406216101	HALLIBURTON CO	Principal	140	7105	7094 92	7094 92
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 412822108	HARLEY DAVIDSON INC	Principal	150	10386	10348 2	10348 2
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 45866F104	INTERCONTINENTALEXCHANGE GRO	Principal	51	11470 92	11487 14	11487 14
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 478366107	JOHNSON CONTROLS INC	Principal	210	10773	10722 18	10722 18
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 517834107	LAS VEGAS SANDS CORP	Principal	130	10253 1	10103 34	10103 34
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 548661107	LOWE'S COMPANIES INC	Principal	210	10405 5	10222 46	10222 46
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 565849106	MARATHON OIL CORP	Principal	230	8119	8100 03	8100 03
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 59156R108	METLIFE INC	Principal	260	14019 2	13904 28	13904 28
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 637071101	NATIONAL OILWELL VARCO INC	Principal	90	7157 7	7063 44	7063 44
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 713448108	PEPSICO INC	Principal	120	9952 8	9823 42	9823 42
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 718172109	PHIUP MORRIS INTERNAT	Principal	80	6970 4	6874 42	6874 42
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 742718109	PROCTER & GAMBLE CO	Principal	120	9769 2	9778 56	9778 56
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 79466L302	SALESFORCE COM INC	Principal	190	10486 1	10407 82	10407 82
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 82481R106	SHIRE PLC	Principal	82	11585 78	11429 16	11429 16
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 845467109	SOUTHWESTERN ENERGY CO	Principal	250	9832 5	10039 5	10039 5
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 881624209	TEVA PHARMACEUTICAL INDS ADR	Principal	230	9218 4	9077 64	9077 64
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 91913Y100	VALERO ENERGY CORP NEW	Principal	150	7560	7258 2	7258 2
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 949746101	WELLS FARGO & COMPANY	Principal	250	11350	11351 92	11351 92
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 984332106	YAHOO INC	Principal	250	10110	10222	10222

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STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 991061052	CRA (BNY MELLON, N A., MEMBER FDIC)	Principal	5740 39	5740 39	5740 39	5740 39
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 G29183103	EATON CORP PLC	Principal	170	12940 4	12914 56	12914 56
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 G49187108	INVESCO LTD	Principal	290	10556	10572 82	10572 82
STUTZMAN FAM FDN-NON DIS-LG FCS-SUB	2013	12 Y04865104	AVAGO TECHNOLOGIES LTD	Principal	190	10047 01	10002 23	10002 23
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 00206R102	AT&T INC	Principal	120	4219 2	4193 76	4193 76
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 002824100	ABBOTT LABORATORIES	Principal	100	3833	3826 77	3826 77
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 009158106	AIR PRODS & CHEMS INC	Principal	36	4024 08	4078 01	4078 01
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 037833100	APPLE INC	Principal	6	3366 12	3405 57	3405 57
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 040101103	ARES CAPITAL CORP	Principal	230	4087 1	4042 94	4042 94
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 110122108	BRISTOL-MYERS SQUIBB CO	Principal	110	5846 5	5841 88	5841 88
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 149123101	CATERPILLAR INC	Principal	40	3632 4	3631 52	3631 52
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 151897107	CENTERPOINT ENERGY INC	Principal	170	3940 6	3936 86	3936 86
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 166764100	CHEVRON CORPORATION	Principal	30	3747 3	3700 74	3700 74
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 20030N101	COMCAST CORP CL A	Principal	80	4157 2	4081 44	4081 44
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 20825C104	CONOCOPHILLIPS	Principal	50	3532 5	3493 4	3493 4
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 237194105	DARDEN RESTAURANTS INC	Principal	80	4349 6	4333 44	4333 44
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 25746U885	DOMINION RES INC VA PFD	Principal	80	4336 8	4415 83	4415 83
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 260543103	DOW CHEMICAL CO	Principal	110	4884	4877 18	4877 18
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 263534109	DU PONT (E I) DE NEMOURS	Principal	60	3898 2	3812 88	3812 88
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 26441C204	DUKE ENERGY CORP	Principal	70	4830 7	4845 96	4845 96
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 363576109	GALLAGHER ARTHUR J & CO	Principal	90	4223 7	4181 22	4181 22
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 369604103	GENERAL ELECTRIC CO	Principal	220	6166 6	6069 33	6069 33
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 461318100	INVESCO MORTGAGE CAPITAL	Principal	190	2789 2	2817 32	2817 32
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 482480100	K L A - TENCOR CORP	Principal	70	4512 2	4481 96	4481 96
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 494368103	KIMBERLY CLARK CORP	Principal	34	3551 64	3567 55	3567 55
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 49456B101	KINDER MORGAN INC	Principal	90	3240	3193 92	3193 92
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 517834107	LAS VEGAS SANDS CORP	Principal	80	6309 6	6217 44	6217 44
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 539830109	LOCKHEED MARTIN CORP	Principal	43	6392 38	6271 46	6271 46
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 544147101	LORILLARD INC	Principal	160	8108 8	8082 88	8082 88
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 548661107	LOWE'S COMPANIES INC	Principal	110	5450 5	5354 63	5354 63
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 577081102	MATTEL INC	Principal	70	3330 6	3203 76	3203 76
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 609207105	MONDELEZ INTERNATIONAL	Principal	130	4589	4505 29	4505 29
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 636274300	NATIONAL GRID PLC-SP ADR	Principal	80	5225 6	5147 04	5147 04
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 648287102	NEW RESIDENTIAL INVESTMENT	Principal	330	2204 4	2312 38	2312 38
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 65339F887	NEXTERA ENERGY INC CONV PFD	Principal	100	5663	5648 79	5648 79
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 655664100	NORDSTROM INC	Principal	60	3708	3679 08	3679 08
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 670346105	NUCOR CORP	Principal	70	3736 6	3733 66	3733 66
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 674599105	OCCIDENTAL PETROLEUM CORP	Principal	30	2853	2797 74	2797 74
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 682680103	ONEOK INC	Principal	50	3109	3000 9	3000 9
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 693475105	PNC FINANCIAL SERVICES GROUP	Principal	40	3103 2	3085 92	3085 92
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 69351T114	PPL CORPORATION 8 75%	Principal	80	4230 4	4205 43	4205 43
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 713448108	PEPSICO INC	Principal	50	4147	4093 08	4093 08
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 717081103	PFIZER INC	Principal	160	4900 8	4852 45	4852 45
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 718172109	PHILIP MORRIS INTERNAT	Principal	50	4356 5	4296 52	4296 52
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 718546104	PHILLIPS 66	Principal	50	3856 5	3734 35	3734 35
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 72651A108	PLAINS GP HOLDINGS LP-CL A	Principal	150	4015 5	3923 7	3923 7
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 742718109	PROCTER & GAMBLE CO	Principal	60	4884 6	4889 28	4889 28
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 855718105	STARWOOD PROPERTY TRUST INC	Principal	170	4709	4723 96	4723 96
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 874039100	TAIWAN SEMICONDUCTOR MFG CO ADR	Principal	170	2964 8	2907 94	2907 94
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 881624209	TEVA PHARMACEUTICAL INDS ADR	Principal	100	4008	3946 8	3946 8

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STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 911312106	UNITED PARCEL SERVICE CL B	Principal	49	5148 92	5114 03	5114 03
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 913017117	UNITED TECHNOLOGIES 7 5%	Principal	80	5237 6	5187 03	5187 03
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 92343V104	VERIZON COMMUNICATIONS INC	Principal	20	982 8	977 16	977 16
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 969457100	WILLIAMS COS INC	Principal	90	3471 3	3386 52	3386 52
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 991061052	CRA (BNY MELLON, N A., MEMBER FDIC)	Principal	4093 26	4093 26	4093 26	4093 26
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 G29183103	EATON CORP PLC	Principal	70	5328 4	5317 76	5317 76
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 G7945M107	SEAGATE TECHNOLOGY	Principal	60	3369 6	3374 55	3374 55
STUTZMAN FAM FDN-NON DIS-LG DIV-SUB	2013	12 Y0486S104	AVAGO TECHNOLOGIES LTD	Principal	40	2115 16	2105 73	2105 73
STUTZMAN FAM FDN DTD 7-17-07-DISCL	2013	12 19765P406	COLUMBIA COMMON STOCK-Z	Principal	3679 25	75829 42	56440 23	56430 84
STUTZMAN FAM FDN DTD 7-17-07-DISCL	2013	12 19765Y688	COLUMBIA LARGE CAP GROWTH-Z	Principal	3956 8	76128 81	54721 85	54721 78
STUTZMAN FAM FDN DTD 7-17-07-DISCL	2013	12 922042858	VANGUARD FTSE EMERGING MARKETS ETF	Principal	550	22627	27060 75	20746
STUTZMAN FAM FDN DTD 7-17-07-DISCL	2013	12 991061052	CRA (BNY MELLON, N A., MEMBER FDIC)	Principal	427353 56	427353 56	427353 56	427353 56
STUTZMAN FAM FDN DTD 7-17-07 DISCL	2013	12 991061052	CRA (BNY MELLON, N A., MEMBER FDIC)	Invested Income	1836 56	1836 56	1836 56	1836 56
TOTAL						<u>7974468 17</u>	<u>6680680 59</u>	<u>6701369 48</u>

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Holdings (Symbol) as of December 31, 2013	Quantity December 31, 2013	Price per Unit December 31, 2013	Total Cost Basis	Total Value December 31, 2013	Total Value December 31, 2013	Unrealized Gain (Loss) December 31, 2013
Stocks 99% of holdings						
BARCLAYS BANK PLC iPATH ETN 12/08/36 DJ-UBS COM INDX TO RT CALLABLE NOT RATED (DJP)	1,000 000	\$36 750	\$36,489 90	\$36,310 00	\$36,750.00	-\$ 1 739 90
ISHARES INC MSCI FRONTIER 100 ETF (FM)	2,529 000	33 740	75,035 43	83,431 71	85 328 46	10,293 03
ISHARES INC MSCI EMRG MKTS MIN VOLATILITY ETF (EEMV)	3,877 000	58.260	227,216 60	230,216 26	225,874 02	- 1,342 58
ISHARES SELECT DIVIDEND ETF (DIVY)	3,158 000	71 350	196,570 70	221,596 86	225,323.30	28,752 60
ISHARES CORE S&P 600 ETF (IVV)	2,138 000	185 650	298,005 13c	389,030 48	396,919 70	98,914 57
ISHARES MSCI EMERGING MARKETS ETF (EEM)	5,360 000	41 795	220,013 73	226,996 00	224,021 20	4 007 47
ISHARES MSCI EAFE ETF (EFA)	7,214 000	67 095	432,730 48	477,855 36	484 023 33	51 292 87
ISHARES RUSSELL MIDCAP VALUE ETF (IWS)	323 000	65 710	19,052 77	20 772 13	21,224 33	2 171 56
ISHARES RUSSELL 1000 VALUE ETF (IWO)	1,371 000	94 170	94 475 61c	126 721.53	129 107 07	34 631 46
ISHARES S&P MID CAP 400 GROWTH ETF (IUX)	1,183 000	150 190	149,577 34	172 445 91	177 674 77	28,097 43
ISHARES RUSSELL 2000 VALUE ETF (IWN)	1,187 000	99 500	99 708 00	118,504.05	118 106 50	18 398.50
ISHARES RUSSELL 2000 GROWTH ETF (IWO)	1,329 000	135 510	134 670 41	177,062.67	180,092.79	45,422 38
ISHARES RUSSELL 2000 ETF (IWM)	3,437 000	115.380	304 654 92c	390,133.87	396,492 32	91,837 40
ISHARES S&P MIDCAP 400 VALUE ETF (IWV)	1 499 000	116.230	149,815 04	170 376 34	174,228 77	24,613 73
ISHARES U S REAL ESTATE ETF (IYR)	1,228 000	63.080	77,871 00c	77,486 80	77,462 24	- 208 76
ISHARES MSCI EAFE SMALL-CAP ETF (SCZ)	400 000	50 980	17,939 76	20,044 00	20,392 00	2 452 24
ISHARES JP MORGAN USD EMERGING MARKETS BOND ETF (EMB)	1,000 000	108 160	113,850 00c	108 670 00	108 160 00	- 5 490 00
ISHARES INTERNATIONAL DIVIDEND ETF (IDV)	3,497 000	37 940	113,904 65c	130,962 65	132,676 18	18,771 53
ISHARES iBOXX HIGH YIELD CORPORATE BOND ETF (HYG)	1,000 000	92.880	90,730 00c	93,420 00	92 880 00	2 150 00
ISHARES INTERMEDIATE CREDIT BOND ETF (CIU)	2,574 000	107.880	280,681 96c	278,407 70	277,683 12	- 2,998 84
ISHARES US PREFERRED STOCK ETF (PFF)	911 000	36 830	36,813 42	34,772 87	33,552 13	- 3 261.25
ISHARES MICRO CAP ETF (IWC)	1,278 000	75 120	74,826 77	94,393 08	96,003 36	21 176.59
ISHARES TRUST FLOATING RATE BD ETF (FLOT)	800 000	50 720	39 940 96	40 504 00	40 576 00	635 04
ISHARES TRUST MSCI EAFE MIN VOLATIL ETF (EFAV)	2,000 000	61 800	110,061 60	123,420 00	123,200 00	13,138 40
ISHARES TRUST MSCI USA MINVOLATILITY	9,387 000	35.500	299 632 10	330,985 62	333,238 50	33 606 40

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Holdings (Symbol) as of December 31, 2013	Quantity December 31, 2013	Price per Unit December 31, 2013	Total Cost Basis	Total Value December 31, 2013	Total Value December 31, 2013	Unrealized Gain (Loss) December 31, 2013
ISHARES TRUST INTL INFLATION-UKD BD ETF (ITIP)	750.000	45.840	38,762.56c	34,567.50	34,380.00	2,382.56
POWERSHARES QQQ TR UNIT SER 1 (QQQ)	3,887.000	87.960	266,659.71	333,232.51	341,900.52	75,240.81
POWERSHARES EXCHANGE TRADED FDS TST FTSE	494.000	97.730	32,710.21c	47,428.94	48,278.62	15,568.41
RAFI US 1500 SMALL-MID PORTFOLIO ISIN #US73935X5674 SEDOL #B63YR87 (PRFZ)						
SPDR S&P 500 ETF TRUST UNIT SER 1 S&P (SPY)	859.000	184.690	133,447.20	155,479.00	158,648.71	25,201.51
SPDR S&P MIDCAP 400 ETF TR UNIT SER 1 STANDARD & POORS DEP RCPT (MDY)	496.000	244.200	94,704.62c	117,765.28	121,123.20	26,418.58
VANGUARD INDEX FDS VANGUARD REIT ETF FORMERLY VANGUARD INDEX TR TO 05/24/01 REIT VIPER SHS (VNQ)	2,749.000	64.580	199,830.37	180,059.50	177,475.44	- 22,454.93
Subtotal of Stocks			4,459,882.93		5,092,796.58	632,913.65
Core Account 1% of holdings						
CASH	71,262.080	1.000	not applicable	42,057.07	71,262.08	not applicable
Subtotal of Core Account					71,262.08	
Total			\$ 4,459,882.93		\$5,164,058.66	\$ 632,913.65

Part III (990-PF) - Changes in Net Assets or Fund Balances

Line 3 - Other increases not included in Part III, Line 2

1	<u>COMPLETED COST ADJUSTMENTS - REC'D FROM SUCCESSOR</u>	1	<u>122,141</u>
2	<u>COST BASIS ADJUSTMENT</u>	2	<u>2,876</u>
3	<u>Total</u>	3	<u>125,017</u>

Line 5 - Decreases not included in Part III, Line 2

1	<u>GAIN ON CY SALES NOT SETTLED AT YEAR END</u>	1	<u>148,090</u>
2	<u>Total</u>	2	<u>148,090</u>

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Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

Amount		Long Term OG Distributions		Short Term OG Distributions		9,751,124		0		0		9,006,917		741,207		0		0		0		741,207	
		189,867		0																			
Description of Property Sold		CUSIP #	How Acquired	Date Acquired	Date Sold	Gross Sales Price	Depreciation Allowed	Adjustments	Cost or Basis Plus Expense of Sale	Gain or Loss	F M V as of 12/31/89	Adjusted Basis as of 12/31/89	Excess of FMV Over Adj Basis	Gain Minus Excess of FMV Over Adjusted Basis or Losses									
1	PRMCO DEVELOPING LOCAL MK-IN	72201F409		4/24/2013	12/26/2013	131,131		0	131,008	-2,875	0	0	0	-2,875									
2	PRMCO GLOBAL NATURAL RESOURCE Y	74872H848		4/24/2013	12/26/2013	258,531		0	273,202	-14,671	0	0	0	-14,671									
3	RS GLOBAL NATURAL RESOURCE Y	74872H848		12/16/2013	12/26/2013	9,835		0	9,588	269	0	0	0	269									
4	TEMPLETON GLOBAL BOND FUND	800208400		4/22/2013	12/26/2013	130,465		0	135,468	-5,003	0	0	0	-5,003									
5	ETRACR ALERIAN INFRASTRUCTURE	902641646		4/22/2013	12/26/2013	138,426		0	136,438	1,988	0	0	0	1,988									
6	ETRACR ALERIAN INFRASTRUCTURE	902641646		2/26/2013	12/26/2013	23,825		0	21,745	2,880	0	0	0	2,880									
7	COLUMBIA ACORN SELECT FUND-Z	197106834		3/24/2010	12/26/2013	215,812		0	205,380	10,432	0	0	0	10,432									
8	COLUMBIA ACORN SELECT FUND-Z	197106834		12/11/2013	12/26/2013	46,831		0	44,814	2,017	0	0	0	2,017									
9	COLUMBIA SHORT TR BOND-Z	19785Y382		8/15/2008	12/26/2013	158,872		0	124,691	3,081	0	0	0	3,081									
10	COLUMBIA COMMON STOCK-Z	19785Y382		8/15/2008	12/31/2013	125,000		0	92,045	32,955	0	0	0	32,955									
11	COLUMBIA LARGE CAP GROWTH-Z	19785Y388		8/15/2008	12/31/2013	150,000		0	64,685	85,315	0	0	0	85,315									
12	HARBOR FD INTL FD	411511308		7/1/2011	12/26/2013	21,277		0	19,952	1,325	0	0	0	1,325									
13	HARBOR FD INTL FD	411511308		7/8/2011	12/26/2013	9,742		0	9,000	742	0	0	0	742									
14	HARBOR FD INTL FD	411511308		12/17/2013	12/26/2013	866		0	866	0	0	0	0	0									
15	KALMAR POOLED INVY TR SMALL	483436206		7/1/2011	12/26/2013	25,016		0	20,000	5,016	0	0	0	5,016									
16	KALMAR POOLED INVY TR SMALL	483436206		7/8/2011	12/26/2013	6,175		0	4,909	1,176	0	0	0	1,176									
17	KALMAR POOLED INVY TR SMALL	483436206		2/26/2013	12/26/2013	69,312		0	45,000	24,312	0	0	0	24,312									
18	MAINSTAY EPOCH GLOBAL EQ YLD FUND	56063J884		4/24/2013	12/26/2013	963,435		0	614,748	348,687	0	0	0	348,687									
19	MAINSTAY EPOCH GLOBAL EQ YLD FUND	56063J884		12/8/2013	12/26/2013	5,302		0	5,220	82	0	0	0	82									
20	MARKET VECTORS AGRIBUSINESS	57080U805		4/22/2013	12/26/2013	138,622		0	135,484	3,138	0	0	0	3,138									
21	PRMCO COMMODITY RR STRAT-INS	72201F409		2/26/2013	12/26/2013	480,087		0	587,698	-107,611	0	0	0	-107,611									
22	PRMCO DEVELOPING LOCAL MK-IN	72201F409		2/26/2013	12/26/2013	143,744		0	150,000	-6,256	0	0	0	-6,256									
23	PRMCO DEVELOPING LOCAL MK-IN	72201F409		4/22/2013	12/26/2013	128,718		0	135,483	-6,747	0	0	0	-6,747									
24	UNIDIRC MGRS BEHAV VAL-INS	904504842		4/22/2013	12/26/2013	422,429		0	338,697	83,762	0	0	0	83,762									
25	UNIDIRC MGRS BEHAV VAL-INS	904504842		12/2/2013	12/31/2013	2,681		0	2,654	25	0	0	0	25									
26	WISDOMTREE EMG MKTS HY EQUI	87717W851		4/24/2013	12/26/2013	631,510		0	680,428	-58,918	0	0	0	-58,918									
27	WISDOMTREE JAPAN HEDGED EQUITY	87717W851		4/22/2013	12/26/2013	143,555		0	135,262	8,293	0	0	0	8,293									
28	BOA - BT GAIN FROM SALES	SEE ATTACHED				112,783		0	100,363	12,400	0	0	0	12,400									
29	BOA - LT GAIN FROM SALES	SEE ATTACHED				24,162		0	24,162	0	0	0	0	0									
30	FIDELITY - BT GAIN FROM SALES	SEE ATTACHED				219,791		0	213,038	3,753	0	0	0	3,753									
31	FIDELITY - LT GAIN FROM SALES	SEE ATTACHED				655,410		0	651,612	3,798	0	0	0	3,798									

Bank of America – Sales Detail

Date	Description	Cash	Tax Cost	Short-term Realized Gain/Loss	Long-term Realized Gain/Loss
Sales and Redemptions					
01/17/13	POWERSHARES DQQ TR UNIT SER 1 LAZARD FRERES & CO 01/14 SALE 15,500.00 SHR @ \$7.010000 MISC 23.27 COMM 465.00	\$1,038,166.73	-\$901,231.45		\$136,335.28
02/07/13	COLUMBIA ACORN SELECT FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 739.071 UNITS @ 27.4400	\$20,280.11	\$21,000.00		\$719.89
04/23/13	COLUMBIA SHORT TERM BOND FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 18,645.025 UNITS @ 10.0180	\$186,883.23	-\$185,371.31		\$1,491.92
04/23/13	COLUMBIA SMALL CAP GROWTH I FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 8,323.780 UNITS @ 29.5000	245,551.51	-179,146.81		66,404.70
04/23/13	JANUS ENTERPRISE FUND CL I MUTUAL FUND AGENT PROCEEDS REDEMPTION 1,850.588 UNITS @ 71.1888	131,708.34	-42,111.32		23,595.02
04/23/13	JORN HAMCOCK FDS DI UNTL GROWTH FUND CL I MUTUAL FUND AGENT PROCEEDS REDEMPTION 30,227.011 UNITS @ 21.9000	662,925.14	-484,392.77		198,542.37
04/25/13	ISHR MSCI JAPAN INDEX FUND CS FIRST BOSTON 04/22 SALE 10,000.00 SHR @ 11.3001000 MISC 2.54 COMM 300.00	112,698.48	-100,300.00	12,398.48	

Bank of America – Sales Detail

Date	Description	Cash	Tax Cost	Short-term Realized Gain/Loss	Long-term Realized Gain/Loss
Sales and Maturities					
04/25/13	ISHARES MSCI EAFE INDEX FUND BARCLAYS CAPITAL LE 04/22 SALE 5,000.00 SHRS @ 59.2416000 MSCI EAFE COMMA 125.00	298,076.58	-308,100.00		-12,023.64
04/25/13	JANUS ENTERPRISE FUND CL 1 MUTUAL FUND AGENT PROCEEDS REDEMPTION 3,852.285 UNITS @ 71.8600	276,833.13	-143,841.50		133,191.63
04/25/13	ISHARES MSCI EMERGING MKTS INDEX FUND CS FIRST BOSTON 04/24 SALE 6,429.00 SHRS @ 42.340000 MSCI EEM COMMA 180.50	271,683.82	-213,520.80		58,153.02
04/25/13	VANGUARD FTSE EMERGING MKTS ETF WELLS FARGO CO 04/24 SALE 12,175.00 SHRS @ 42.850000 MSCI EEM COMMA 381.46	544,447.81	-538,292.17		51,844.26
05/17/13	COLUMBIA CONTRARIAN CORE FUND CLASS Z SHARES FORMERLY COLUMBIA COMMON STOCK FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 525,210 UNITS @ 19.0400	\$10,000.00	\$7,935.92		\$2,064.08
05/22/13	COLUMBIA ACORN SELECT FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 333,778 UNITS @ 29.9600	10,000.00	-8,411.21		1,588.79
05/22/13	COLUMBIA SHORT TERM BOND FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 1,998,002 UNITS @ 10.0089	20,000.00	-19,860.14		139.86
05/22/13	COLUMBIA CONTRARIAN CORE FUND CLASS Z SHARES FORMERLY COLUMBIA COMMON STOCK FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 1,007,344 UNITS @ 19.2800	20,000.00	-15,674.27		4,325.73

Bank of America – Sales Detail

Date	Description	Cash	Fair Cost	Short-term Realized Gain/Loss	Long-term Realized Gain/Loss
Sales and Maturities					
06/25/13	COLUMBIA SHORT TERM BOND FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 79,223.185 UNITS @ 9.9400	\$787,478.26	\$776,035.61		\$11,442.65
09/12/13	COLUMBIA SHORT TERM BOND FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 959 UNITS @ 9.5000	9.52	-9.26		0.26
09/12/13	COLUMBIA CONTRARIAN CORE FUND CLASS Z SHARES FORMERLY COLUMBIA COMMON STOCK FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 608 UNITS @ 19.9900	12.15	-9.39		2.76
09/12/13	COLUMBIA SELECT LARGE CAP GROWTH FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION .005 UNITS @ 18.0000	0.09	-0.07		0.02
09/12/13	HARBOR INTERNATIONAL FUND INSTL CL MUTUAL FUND AGENT PROCEEDS REDEMPTION 724 UNITS @ 68.4000	49.52	-47.54		1.98
09/12/13	KALMAR POOLED INVT TR SMALL CAP GROWTH-WITH-VALUE FUND MUTUAL FUND AGENT PROCEEDS REDEMPTION .049 UNITS @ 20.8700	1.02	-0.90		0.12
09/12/13	PIMCO EMERGING MKT CURRENCY FUND INSTL MUTUAL FUND AGENT PROCEEDS REDEMPTION .009 UNITS @ 10.0700	0.09	-0.09		

Bank of America – Sales Detail

Date	Description	Cash	Tax Cost	Short-term Realized Gain/Loss	Long-term Realized Gain/Loss
Sales and Maturities					
09/12/13	COLUMBIA ACORN SELECT FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 753 UNITS @ 79.6300	\$22.61	\$19.23		\$3.38
09/12/13	COLUMBIA CONTRARIAN CORE FUND CLASS Z SHARES FORMERLY COLUMBIA COMMON STOCK FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 229 UNITS @ 19.9900	4.58	3.45		1.12
09/12/13	COLUMBIA SELECT LARGE CAP GROWTH FUND CLASS Z SHARES MUTUAL FUND AGENT PROCEEDS REDEMPTION 914 UNITS @ 18.0000	16.45	-12.47		3.98
09/12/13	JANUS ENTERPRISE FUND CL I MUTUAL FUND AGENT PROCEEDS REDEMPTION 313 UNITS @ 80.1000	25.07	11.62		13.45
09/12/13	MAINSTAY EPOCH GLOBAL EQUITY YIELD FUND I MUTUAL FUND AGENT PROCEEDS REDEMPTION 345 UNITS @ 18.3200	6.32	-6.19	0.13	
09/12/13	PIMCO COMMODITY REALRETURN STRATEGY FUND MUTUAL FUND AGENT PROCEEDS REDEMPTION 612 UNITS @ 5.7000	3.49	4.17	-0.68	
09/12/13	PIMCO EMERGING MKT CURRENCY FUND MULTI MUTUAL FUND AGENT PROCEEDS REDEMPTION 887 UNITS @ 10.0700	8.93	-9.44	-0.51	

Bank of America – Sales Detail

Date	Description	Cash	Tax Cost	Short-term Realized Gain/Loss	Long-term Realized Gain/Loss
Sales and Maturities					
09/12/13	RS GLOBAL NATURAL RES FUND CL Y MUTUAL FUND AGENT PROCEEDS REDEMPTION 601 UNITS @ 38.7000	23.28	27.50	0.78	
09/12/13	TEMPLETON GLOBAL BD FUND ADVISOR CL MUTUAL FUND AGENT PROCEEDS REDEMPTION 384 UNITS @ 12.9500	4.97	-5.20	-0.23	
09/12/13	UNDISCOVERED MANAGERS FDS BEHAVIORAL VALUE FD INSTL CL MUTUAL FUND AGENT PROCEEDS REDEMPTION 356 UNITS @ 48.2800	17.22	-15.33	1.89	
Total Sales and Maturities		\$4,634,926.31	-\$4,033,212.14	\$12,399.84	\$589,314.33



2013 TAX REPORTING STATEMENT

THE STUTZMAN FAMILY FOUNDATION
Account No 648-960388 Customer Service 239-254-1875
Recipient ID No 34-7218643 Payer's Fed ID Number 04-3523567

FORM 1099-B*

2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
(This label is a Substitute for Boxes 1c & 6)

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

8 Description, 1d Stock or Other Symbol, CUSIP									
Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Disallowed	4 Federal Income Tax Withheld	16 State Tax Withheld
ISHARES TR S&P U S PFD STK INDEX FD, PFF, 464288687									
Sale	06/10/13	03/19/13	2,800 000	111,166 18	113,147 72	-1,981 54			
ISHARES TRUST FLTQ RATE NT FD ETF, FLOT, 464298855									
Sale	06/10/13	08/25/12	1,000 000	50,672 51	49,926 20	746 31			
POWERSHARES QQQ TR UNIT SER 1, QQQ, 73935A104									
Sale	07/31/13	03/19/13	486 000	36,667 36	33,341 04	3,326 32			
SPDR S&P 500 ETF TRUST UNIT SER 1 S&P, SPY, 78462F103									
Sale	07/31/13	03/19/13	107 000	18,084 83	16,622 64	1,462 19			
TOTALS				216,790.88	213,037.60			0.00	
				Box A Short-Term Realized Gain		6,734.82			
				Box A Short-Term Realized Loss		-1,981.54			
				Box A Wash Sale Loss Disallowed			0.00		

* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

02/23/2014 9001145827

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2013 TAX REPORTING STATEMENT

THE STUTZMAN FAMILY FOUNDATION
Account No 648-980386 Customer Service 239-254-1875
Recipient ID No 34-7218643 Payer's Fed ID Number 04-3523567

FORM 1099-B*

2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO 1545-0715

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II
(This label is a Substitute for Boxes 1c & 6)

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

8 Description, 1d Stock or Other Symbol, CUSIP									
Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
ISHARES CORE S&P 500 ETF, IVV, 464287200									
Sale	07/31/13	04/25/12	267 000	45,367.88	37,215.80	8,152.08			
ISHARES CORE TOTAL US BOND MARKET ETF, AGG, 464287226									
Sale	04/16/13	04/25/12	3,500 000	389,064.58	386,295.00	2,769.58			
ISHARES INTERMEDIATE CREDIT BOND ETF, CIU, 464286638									
Sale	11/12/13	04/25/12	926 000	99,923.66	100,975.72	-1,052.06			
ISHARES RUSSELL 1000 VALUE ETF, IWD, 464287598									
Sale	07/31/13	04/25/12	171 000	15,035.78	11,783.61	3,252.17			
SPDR GOLD TR GOLD SHS, GLD, 78463V107									
Principal	01/07/13	04/25/12	0 000	38.24	38.02	0.22			
Principal	02/21/13	04/25/12	0 000	39.51	40.99	-1.48			
Principal	03/12/13	04/25/12	0 000	38.39	39.40	-1.01			
Principal	04/09/13	04/25/12	0 000	39.31	40.77	-1.46			
Sale	04/12/13	04/25/12	728 000	105,862.65	115,183.07	-9,320.42			
Subtotals				108,018.10	115,342.25				
TOTALS				655,410.00	651,612.38				0.00
				Box E Long-Term Realized Gain		14,174.05			
				Box E Long-Term Realized Loss		-10,376.43			
				Box E Wash Sale Loss Disallowed			0.00		

* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

5/9/2014 11:37:00 AM - 1488 - 104 - STUTZMAN FAMILY FOUNDATION

Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

57,273											0		0	
	Name	Check "X" if Business	Street	City	State	Zip Code	Foreign Country	Title	Avg Hrs Per Week	Compensation	Benefits	Expense Account		
1	ANDREW KRAUSE		C/O STUTZMAN FOUNDATION					TRUSTEE	5 00	57,273	NONE	NONE		
2	WALTER STUTZMAN		C/O STUTZMAN FOUNDATION					TRUSTEE	5 00	0	NONE	NONE		

Part VI, Line 6a (990-PF) - Estimated Tax Payments

	Date	Amount
1 Credit from prior year return		1
2 First quarter estimated tax payment	5/14/2013	2 1,864
3 Second quarter estimated tax payment	6/11/2013	3 1,864
4 Third quarter estimated tax payment	9/11/2013	4 1,863
5 Fourth quarter estimated tax payment	12/18/2013	5 1,863
6 Other payments		6
7 Total		7 7,454

STUTZMAN FAMILY FOUNDATION

34-7218543

FORM 990PF, PART VII-A – NEW SUBSTANTIAL CONTRIBUTORS

NAME AND ADDRESS

STUTZMAN CHARITABLE LEAD TRUST
800 LAUREL OAK DR., STE 600
NAPLES, FL 34108

STUTZMAN FAMILY FOUNDATION

34-7218543 Page 1 of 2

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

HUNTER COLLEGE FOUNDATION

Street

695 PARK AVE E 1313

City

NEW YORK

State

NY

Zip Code

10065

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

EDUCATIONAL SCHOLARSHIPS

Amount

21,000

Name

SOUTHERN CONNECTICUT STATE UNIV FDN

Street

501 CRESCENT ST

City

NEW HAVEN

State

CT

Zip Code

06515

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

SUPPORT CHOIR TRAVEL

Amount

183,750

Name

MUSIC FOR LIFE INTERNATIONAL

Street

431 WEST 146TH ST., NO 4

City

NEW YORK

State

NY

Zip Code

10031

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

FUND ADMINISTRATIVE STAFF POSITION

Amount

9,000

Name

SARAH LAWRENCE COLLEGE

Street

1 MEADWAY

City

BRONXVILLE

State

NY

Zip Code

10708

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

SUPPORT POETRY FESTIVAL

Amount

20,000

Name

ELM CITY INTERNATIONAL

Street

912 PROSPECT STREET

City

HAMDEN

State

CT

Zip Code

06517

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

EDUCATIONAL SCHOLARSHIPS

Amount

20,000

Name

HADASSAH WZOA, INC

Street

50 WEST 58TH STREET

City

NEW YORK

State

NY

Zip Code

10019

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

DONATION TO THE SARAH WETSMAN TOWER

Amount

50,000

STUTZMAN FAMILY FOUNDATION

34-7218543 Page 2 of 2

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

TEMPLE BETH TIKVAH

Street

PO BOX 1269, 196 DURHAM RD

City

MADISON

State

CT

Zip Code

06443-1269

Foreign Country

Relationship

NONE

Foundation Status

PC

Purpose of grant/contribution

FRIESNER MEMORIAL SCHOLARSHIP

Amount

10,000

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

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Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

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Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount