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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2013

Open to Public Inspection

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

Name of foundation WR Berkley Corporation Charitable Foundation % c/o Foundation Source		A Employer identification number 36-4516560	
Number and street (or P O box number if mail is not delivered to street address) Foundation Source 501 Silverside Rd Suite 123		Room/suite	B Telephone number (see instructions) (800) 839-1754
City or town, state or province, country, and ZIP or foreign postal code Wilmington, DE 198091377		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return</div> <div><input type="checkbox"/> Initial return of a former public charity</div> <div><input type="checkbox"/> Final return</div> <div><input type="checkbox"/> Amended return</div> <div><input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 309,795		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

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)	606,988			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	31	31		
	4 Dividends and interest from securities.				
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a _____				
	7 Capital gain net income (from Part IV , line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	607,019	31		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	1			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	3,025			3,025
	24 Total operating and administrative expenses. Add lines 13 through 23	3,026	0		3,025
	25 Contributions, gifts, grants paid	460,905			460,905
	26 Total expenses and disbursements. Add lines 24 and 25	463,931	0		463,930
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	143,088			
	b Net investment income (if negative, enter -0-)		31		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	155,207	309,795	309,795
	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)			
	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)	155,207	309,795	309,795	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	155,207	309,795	
	30	Total net assets or fund balances (see page 17 of the instructions)	155,207	309,795	
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	155,207	309,795		

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	155,207
2	Enter amount from Part I, line 27a	2	143,088
3	Other increases not included in line 2 (itemize) ▶ _____	3	11,500
4	Add lines 1, 2, and 3	4	309,795
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	309,795

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				
(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				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	382,508	265,030	1 443263
2011	368,618	235,355	1 566221
2010	387,635	334,383	1 159255
2009	331,919	177,981	1 864913
2008	361,116	294,059	1 228039
2	Total of line 1, column (d).		2 7 261691
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 1 452338
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.		4 259,178
5	Multiply line 4 by line 3.		5 376,414
6	Enter 1% of net investment income (1% of Part I, line 27b).		6
7	Add lines 5 and 6.		7 376,414
8	Enter qualifying distributions from Part XII, line 4.		8 463,930
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions			


Part VI

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		
	Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	0
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2.	3	0
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	0
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	0
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2014 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A

Statements Regarding Activities

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

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address				
14	The books are in care of <div>co Foundation Source</div> Telephone no <div>(800) 839-1754</div> <div>Located at 501 Silverside Road Suite 123 Wilmington DE</div> ZIP +4 <div>198091377</div>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

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

Part VII-B

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b		
	Organizations relying on a current notice regarding disaster assistance check here.	<input checked="" type="checkbox"/>		
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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
William R Berkley	Pres / Dir	0		
Foundation Source 501 Silverside Rd Wilmington, DE 198091377	1 0			
William R Berkley Jr	VP / Dir / Treas	0		
Foundation Source 501 Silverside Rd Wilmington, DE 198091377	1 0			
Josephine A Raimondi	VP / Dir / Sec	0		
Foundation Source 501 Silverside Rd Wilmington, DE 198091377	1 0			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Total number of other employees paid over \$50,000.				

Part VIII

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

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

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

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

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	0
b	Average of monthly cash balances.	1b	263,125
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	263,125
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	0
3	Subtract line 2 from line 1d.	3	263,125
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	3,947
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	259,178
6	Minimum investment return. Enter 5% of line 5.	6	12,959

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	12,959
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	0
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	0
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	12,959
4	Recoveries of amounts treated as qualifying distributions.	4	11,500
5	Add lines 3 and 4.	5	24,459
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	24,459

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	463,930
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	463,930
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	463,930
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				24,459
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.				
b Total for prior years 2011 , 2010 , 2009				
3 Excess distributions carryover, if any, to 2013				
a From 2008.	346,431			
b From 2009.	323,021			
c From 2010.	370,917			
d From 2011.	356,851			
e From 2012.	369,257			
f Total of lines 3a through e.	1,766,477			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 463,930				
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.				24,459
e Remaining amount distributed out of corpus	439,471			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,205,948			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				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). . .	346,431			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	1,859,517			
10 Analysis of line 9				
a Excess from 2009. . . .	323,021			
b Excess from 2010. . . .	370,917			
c Excess from 2011. . . .	356,851			
d Excess from 2012. . . .	369,257			
e Excess from 2013. . . .	439,471			

Part XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

1a

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

b

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

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

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

1

Information Regarding Foundation Managers:

a

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

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

2

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

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

a

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

b

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

c

Any submission deadlines

d

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

Part XV

Supplementary Information (continued)

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


Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	460,905
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated


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

Form **990-PF** (2013)


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
100 CLUB OF ARIZONA 5033 N 19TH AVE STE 123 TEMPE,AZ 85015	N/A	PC	Granite Mountain Hotshots Fund	5,000
AAMGA EDUCATION FOUNDATION 150 S WARNER RD STE 156 KING OF PRUSSIA,PA 19406	N/A	PC	General & Unrestricted	9,000
ABBY KELLEY FOSTER HOUSE INC 52 HIGH ST WORCESTER,MA 01609	N/A	PC	Women's Center Project	3,325
AMANDA CARES INC 1821 GRAND AVE WDM,IA 50265	N/A	PC	General & Unrestricted	1,000
AMERICAN CANCER SOCIETY 6525 N MERIDIAN AVE Oklahoma City,OK 73116	N/A	PC	General & Unrestricted	1,494
AMERICAN CANCER SOCIETY INC PO BOX 22718 OKLAHOMA CITY,OK 73123	N/A	PC	General & Unrestricted	250
AMERICAN CANCER SOCIETY INC - SAN DIEGO 2655 CAMINO DEL RIO N STE 100 SAN DIEGO,CA 92108	N/A	PC	General & Unrestricted	5,000
AMERICAN HEART ASSOCIATION 10060 BUFFALO SPEEDWAY HOUSTON,TX 77054	N/A	PC	General & Unrestricted	1,000
AMERICAN HEART ASSOCIATION 210 MALABU DR STE 125 LEXINGTON,KY 40503	N/A	PC	General & Unrestricted	1,500
AMERICAN HEART ASSOC - GREAT RIVERS AFFILIATe 509 7TH AVE ALTOONA,PA 16602	N/A	PC	General & Unrestricted	3,250
AMERICAN HEART ASSOCIATION - ARLINGTON VA 4301 N FAIRFAX DR STE 530 ARLINGTON,VA 22203	N/A	PC	General & Unrestricted	100
AMERICAN HEART ASSOCIATION INC 1449 MEDICAL PARK DR BIRMINGHAM,AL 35213	N/A	PC	General & Unrestricted	5,250
AMERICAN RED CROSS - CENTRAL IOWA CHAPTER 2116 GRAND AVE DES MOINES,IA 50312	N/A	PC	General & Unrestricted	500
AMERICAN RED CROSS METROPOLITAN ATLANTA CHAPTER 1955 MONROE DR NE ATLANTA,GA 30324	N/A	PC	General & Unrestricted	777
AMERICARES FOUNDATION INC 88 HAMILTON AVE STAMFORD,CT 06902	N/A	PC	Haiyan Fund	12,696
Total  3a				460,905

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
APPALACHIAN STATE UNIVERSITY THELMA C RALEY HALL ASU BOX 32058 BOONE,NC 28608	N/A	PC	Brantley Center Fund	7,500
ASSISTANCE LEAGUE OF BOISE IDAHO INC PO BOX 140104 GARDEN CITY,ID 83714	N/A	PC	General & Unrestricted	2,000
BAYPATH ELDER SERVICES INC 33 BOSTON POST RD W 5TH FL MARLBOROUGH,MA 01752	N/A	PC	Nutrition Services Program	1,600
BEST BUDDIES INTERNATIONAL INC 8450 HICKMAN RD DES MONIES,IA 50325	N/A	PC	General & Unrestricted	500
BOYS & GIRLS CLUB OF MARSHFIELD INC 37 Proprietors Dr MARSHFIELD,MA 02050	N/A	PC	General & Unrestricted	1,000
BOYS AND GIRLS CLUBS OF METROWEST INC 169 PLEASANT ST MARLBORO,MA 01752	N/A	PC	The hp Technology Center Program	1,725
BOYS CLUB OF MT VERNON NY INC 350 S 6TH AVE MOUNT VERNON,NY 10550	N/A	PC	General & Unrestricted	300
BOYS CLUB OF NEWYORK INC 287 E 10TH ST NEWYORK,NY 10009	N/A	PC	General & Unrestricted	5,000
BRAIN TUMOR FOUNDATION FOR CHILDREN INC 6065 ROSWELL RD STE 505 ATLANTA,GA 30328	N/A	PC	General & Unrestricted	1,000
CASA FOR LANCASTER COUNTY 315 S 9TH ST STE 213 LINCOLN,NE 68508	N/A	PC	General & Unrestricted	1,000
CENTER FOR COMPETITIVE POLITICS 124 S W ST STE 201 ALEXANDRIA,VA 22314	N/A	PC	General & Unrestricted	5,000
CTR FOR EDUCATIONAL INNOVATION-PUB EDUCATION assoc 28 W 44TH ST NEWYORK,NY 10036	N/A	PC	General & Unrestricted	2,500
CHARITABLE ASSISTANCE TO COMMUNITYS HOMELESS 503 S AMERICANA BLVD BOISE,ID 83702	N/A	PC	General & Unrestricted	5,000
CHILDREN AND FAMILY URBAN MINISTRIES 1548 8TH ST DES MOINES,IA 50314	N/A	PC	Whyld Girl Program	1,500
CHILDRENS VILLAGE INC 1 ECHO HILLS DOBBS FERRY,NY 10522	N/A	PC	General & Unrestricted	500
Total  3a				460,905


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CLOVERLEAF AREA ECUMENICAL ASSISTANCE PROGRAM ONE GROVE PL PITTSBURGH,PA 15236	N/A	PC	Food Bank Program	100
CONCERNED CITIZENS FOR COMMUNITY HEALTH 7700 E ROOSEVELT ST SCOTTSDALE,AZ 85257	N/A	PC	General & Unrestricted	500
CONNECTICUT COUNCIL FOR EDUCATION REFORM INC 195 CHURCH ST 7TH FL NEW HAVEN,CT 06510	N/A	PC	General & Unrestricted	5,000
COURT APPOINTED SPECIAL ADVOCATE CASA 212 WASHINGTON ST-RM 1276 NEWARK,NJ 07102	N/A	PC	General & Unrestricted	500
COWBOYS FOR CANCER RESEARCH INC PO BOX 202 DONA ANA,NM 88032	N/A	PC	General & Unrestricted	500
CRIPPLED CHILDRENS FOUNDATION 2019 4TH AVE N BIRMINGHAM,AL 35203	N/A	PC	General & Unrestricted	2,500
CYSTIC FIBROSIS FOUNDATION 8011 34TH AVE S STE 116 BLOOMINGTON,MN 55425	N/A	PC	General & Unrestricted	2,000
CYSTIC FIBROSIS FOUNDATION 10455 SORRENTO VALLEY RD STE 103 SAN DIEGO,CA 92121	N/A	PC	General & Unrestricted	500
DES MOINES AREA RELIGIOUS COUNCIL 3816 36TH ST STE 202 DES MOINES,IA 50310	N/A	PC	Emergency Food Pantry Network Program	1,000
DISABLED AMERICAN VETERANS CHARITABLE SVC TRUST 3725 ALEXANDRIA PIKE COLD SPRING,KY 41076	N/A	PC	General & Unrestricted	900
DOVER CHILDRENS HOME 207 LOCUST ST DOVER,NH 03820	N/A	PC	Pilot House Independent Living Program	2,400
DOWN SYNDROME GUILD OF DALLAS 1702 N COLLINS BLVD STE 170 RICHARDSON,TX 75080	N/A	PC	General & Unrestricted	1,431
DRAVET SYNDROME FOUNDATION INC 11 NANCY DR MONROE,CT 06468	N/A	PC	General & Unrestricted	500
DRESS FOR SUCCESS WORCESTER INC 484 MAIN ST WORCESTER,MA 01608	N/A	PC	Professional Women's Group	1,725
ENABLE INC 13 ROSZEL RD PRINCETON,NJ 08540	N/A	PC	General & Unrestricted	2,000
Total  3a				460,905


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ENVISION UNLIMITED 8 S MICHIGAN AVE STE 1700 CHICAGO,IL 60603	N/A	PC	General & Unrestricted	1,500
FAUQUIER HEALTH FOUNDATION 170 W SHIRLEY AVE STE 101 WARRENTON,VA 20186	N/A	PC	General & Unrestricted	75
FISHER HOUSE FOUNDATION INC 111 ROCKVILLE PIKE STE 420 ROCKVILLE,MD 20850	N/A	PC	General & Unrestricted	1,000
FOOD BANK OF LINCOLN INC 4840 DORIS BAIR CR STE A LINCOLN,NE 68504	N/A	PC	General & Unrestricted	1,000
FOREIGN POLICY ASSOCIATION INCORPORATED 470 PARK AVE S FRNT 2 NEWYORK,NY 10016	N/A	PC	General & Unrestricted	5,000
FOUNDATION FOR TEACHING ECONOMICS 260 RUSSELL BLVD STE B DAVIS,CA 95616	N/A	PC	General & Unrestricted	1,000
FRIENDS OF CITY PARK CITY PARK ADMINISTRATION BLDG NEWORLEANS,LA 70124	N/A	PC	General & Unrestricted	2,500
FRIENDSHIP SERVICE CENTER INC PO BOX 1896 NEWBRITAIN,CT 06051	N/A	PC	General & Unrestricted	2,900
GRAVEL HILL UNITED METHODIST CHURCH 131 GRAVEL HILL RD PALMYRA,PA 17078	N/A	PC	General & Unrestricted	100
GREATER MARLBORO PROGRAMS INCORPORATED 40 MECHANIC ST STE 100 MARLBOROUGH,MA 01752	N/A	PC	Residential Services Program	1,600
GREATER SANTA BARBARA ICE SKATING ASSOCIATION PO BOX 478 SANTA BARBARA,CA 93102	N/A	PC	General & Unrestricted	2,500
GREENWICH CAMBERSHIP FDVOL ACTN CTR OF fairfield 62 PALMERS HILL RD STAMFORD,CT 06902	N/A	PC	General & Unrestricted	2,500
GREENWICH EMERGENCY MEDICAL SERVICE INCORPORATED 1111 E PUTNAM AVE RIVERSIDE,CT 06878	N/A	PC	General & Unrestricted	5,000
GREENWICH HOSPITAL 5 PERRYRIDGE RD GREENWICH,CT 06830	N/A	PC	Emergency Department Campaign	25,000
HANDS ON HARTFORD INC 330 MAIN ST HARTFORD,CT 06106	N/A	PC	Family School Connection Program	1,000
Total ▶ 3a				460,905


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HARDY GIRLS HEALTHY WOMEN INC PO BOX 821 WATERVILLE,ME 04903	N/A	PC	Mason Place Transitional Living Program	1,000
HARVESTERS-THE COMMUNITY FOOD NETWORK 3801 TOPPING AVE KANSAS CITY,MO 64129	N/A	PC	General & Unrestricted	250
HAWTHORN HILL 3001 GRAND AVE DES MOINES,IA 50312	N/A	PC	New Directions Shelter Program	2,000
HEBREW HOME FOR THE AGED ATRIVERDALE FDN INC 5901 PALISADE AVE BRONX,NY 10471	N/A	PC	General & Unrestricted	1,000
HEPHZIBAH CHILDRENS ASSOCIATION 1144 LAKE ST OAK PARK,IL 60301	N/A	PC	General & Unrestricted	5,000
HILLSIDE SOC FOR PREVENTION OF CRUELTY TO animals PO BOX 233 POTTSVILLE,PA 17901	N/A	PC	General & Unrestricted	100
HOSPICE & PALLIATIVE CARE CHARLOTTE REGION 1420 E 7TH ST CHARLOTTE,NC 28204	N/A	PC	Levine & Dickson Hospice House	100
HOSPICE OF THE BLUEGRASS INC 2312 ALEXANDRIA DR LEXINGTON,KY 40504	N/A	PC	General & Unrestricted	50
HOSPICE OF UNION COUNTY INC 700 WROOSEVELT BLVD MONROE,NC 28110	N/A	PC	General & Unrestricted	100
HOUSE OF MERCY 1111 6TH AVE DES MOINES,IA 50314	N/A	PC	General & Unrestricted	1,500
HUMANE SOCIETY OF CONCORD & GREATER CABARRUS CTy PO BOX 5347 CONCORD,NC 28027	N/A	PC	General & Unrestricted	150
HUMANE SOCIETY OF SOMERSET COUNTY 204 WHITETAIL RD SOMERSET,PA 15501	N/A	PC	General & Unrestricted	100
IDAHO FOODBANK WAREHOUSE 3562 S TK AVE BOISE,ID 83705	N/A	PC	General & Unrestricted	5,000
IGLESIA ABRIGO DEL ALTISIMO 3544 W PALMER ST CHICAGO,IL 60647	N/A	PC	Paradise Garden Program	1,000
INDEPENDENT INSURANCE AGENTS OF TEXAS FOUNDATION PO BOX 684487 AUSTIN,TX 78768	N/A	PC	West Tragedy Fund	1,000
Total  3a				460,905


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JA WORLDWIDE 200 CONNECTICUT AVE NORWALK,CT 06854	N/A	PC	General & Unrestricted	2,500
JAYME S FUND FOR SOCIAL JUSTICE CHARITABLE TRUST PO BOX 25 EAST DERRY,NH 03041	N/A	PC	Natalie's Scholarship Fund	2,100
JDRF INTERNATIONAL 26 BROADWAY 14TH FL NEW YORK,NY 10004	N/A	PC	Northern New Jersey & Rockland County Chapter	10,000
JOBS FOR MAINES GRADUATES INC 45 COMMERCE DR STE 9 AUGUSTA,ME 04330	N/A	PC	Learning Works Portland Program	3,000
JOBS WITH JUSTICE EDUCATION FUND 20 IVERS ST BREWER,ME 04412	N/A	PC	General & Unrestricted	2,000
JUNIOR ACHIEVEMENT OF CENTRAL IOWA INC 6100 GRAND AVE DES MOINES,IA 50312	N/A	PC	General & Unrestricted	500
JUNIOR ACHIEVEMENT OF LINCOLN INC 285 S 68TH ST PL STE 309 LINCOLN,NE 68510	N/A	PC	General & Unrestricted	500
JUNIOR LEAGUE OF GREENWICH CONN INC 231 E PUTNAM AVE GREENWICH,CT 06830	N/A	PC	General & Unrestricted	2,500
KIDS CHANCE INC OF PENNSYLVANIA PO BOX 543 POTTSTOWN,PA 19464	N/A	PC	General & Unrestricted	1,000
KIDS CHANCE OF VIRGINIA INC 12701 MARBLESTONE DR STE 250 WOODBIDGE,VA 22192	N/A	PC	General & Unrestricted	8,500
LITERACY VOLUNTEERS OF AMERICA - BANGOR MAINE 200 HOGAN RD BANGOR,ME 04401	N/A	PC	Tutoring Program	2,400
LITERACY VOLUNTEERS OF AMERICA MOHAWK HUDSON INC 1450 WESTERN AVE STE 101 ALBANY,NY 12203	N/A	PC	Basic Literacy Program	2,000
LOWER EASTSIDE SERVICE CENTER INC 80 MAIDEN LN 2ND FL NEW YORK,NY 10038	N/A	PC	Bridge2life Camp & Charles Evans Kids Club	250
LUND FAMILY CENTER INC PO BOX 4009 BURLINGTON,VT 05406	N/A	PC	New Horizons Education Program	2,950
LUVERNE AREA COMMUNITY FOUNDATION PO BOX 623 LUVERNE,MN 56156	N/A	PC	Luverne Hockey Club	1,000
Total  3a				460,905


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
LIVERNE AREA COMMUNITY FOUNDATION PO BOX 623 LIVERNE,MN 56156	N/A	PC	ATLAS For Life Program	1,700
LIVERNE AREA COMMUNITY FOUNDATION PO BOX 623 LIVERNE,MN 56156	N/A	PC	Rotary Park Project	1,000
LIVERNE INITIATIVES FOR TOMORROW 213 E LIVERNE ST LIVERNE,MN 56156	N/A	PC	General & Unrestricted	1,000
LYMPHOMA RESEARCH FOUNDATION 115 BROADWAY 13TH FL NEW YORK,NY 10006	N/A	PC	General & Unrestricted	5,000
MAINE ADAPTIVE SPORTS & RECREATION 8 SUNDANCE LN NEWRY,ME 04261	N/A	PC	Veterans/No Boundaries Program	3,000
MAINE AUTISM ALLIANCE 65 PATTERSON ST AUGUSTA,ME 04330	N/A	PC	General & Unrestricted	2,000
MAINE DEVELOPMENT FOUNDATION 295 WATER ST STE 5 AUGUSTA,ME 04330	N/A	PC	Maine Employers Initiative, 2014 Next Step Scholarship fund	1,000
MANHATTAN INSTITUTE FOR POLICY RESEARCH INC 52 VANDERBILT AVE NEW YORK,NY 10017	N/A	PC	General & Unrestricted	20,000
MARC LUSTGARTEN PANCREATIC CANCER FOUNDATION 1111 STEWART AVE BETHPAGE,NY 11714	N/A	PC	General & Unrestricted	400
MARINE CORPS SCHOLARSHIP FOUNDATION INC 909 N WASHINGTON ST STE 400 ALEXANDRIA,VA 22314	N/A	PC	General & Unrestricted	500
MEALS ON WHEELS OF RIDGEFIELD 25 GILBERT ST RIDGEFIELD,CT 06877	N/A	PC	General & Unrestricted	600
MERIDIAN COMMUNITY COLLEGE FDN 910 HWY 19 N MERIDIAN,MS 39307	N/A	PC	General & Unrestricted	1,000
MOORE CENTER SERVICES INC 195 MCGREGOR ST STE 400 MANCHESTER,NH 03102	N/A	PC	General & Unrestricted	2,100
MY PLACE TEEN CENTER INC 755 MAIN ST WESTBROOK,ME 04092	N/A	PC	After School Program	4,000
NATIONAL CENTER FOR LEARNING DISABILITIES INC 381 PARK AVE S RM 1401 NEW YORK,NY 10016	N/A	PC	General & Unrestricted	5,000
Total  3a				460,905


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
NATIONAL KIDNEY FOUNDATION SERVING THE ALLEGHENIES 3109 FORBES AVE STE 101 PITTSBURGH,PA 15213	N/A	PC	General & Unrestricted	100
NATIONAL MULTIPLE SCLEROSIS SOCIETY 200 12TH AVE S MINNEAPOLIS,MN 55415	N/A	PC	General & Unrestricted	250
NATIONAL PARKS CONSERVATION ASSOCIATION 777 6TH ST NW STE 700 WASHINGTON,DC 20001	N/A	PC	General & Unrestricted	25,000
NEW HAMPSHIRE FOOD BANK DEPT F MANCHESTER,NH 03108	N/A	PC	Recipe for Success Culinary Job Training Program	2,000
NEW YORK LANDMARKS CONSERVANCY INC 1 WHITEHALL ST FL 21 NEWYORK,NY 10004	N/A	PC	General & Unrestricted	5,000
OCEANS HARBOR HOUSE INC PO BOX 622 TOMS RIVER,NJ 08754	N/A	PC	General & Unrestricted	500
ONE FUND BOSTON INC 800 BOYLSTON ST UNIT 990009 BOSTON,MA 02199	N/A	PC	General & Unrestricted	300
PACKAGES FROM HOME 5643 W MOUNTAIN VIEW RD GLENDALE,AZ 85308	N/A	PC	General & Unrestricted	1,000
PALMETTO HEALTH 293 GREYSTONE BLVD COLUMBIA,SC 29210	N/A	PC	Walk for Life Campaign	500
PAN MASSACHUSETTS CHALLENGE TRUST 77 4TH AVE NEEDHAM,MA 02494	N/A	PC	General & Unrestricted	500
PENOBSCOT COMMUNITY HEALTH CTR - E MAINE aids ntwk 370 HARLOW ST BANGOR,ME 04401	N/A	PC	General & Unrestricted	1,600
PERFORMING ARTS CENTER FOUNDATION INC 735 ANDERSON HILL RD PURCHASE,NY 10577	N/A	SO I	General & Unrestricted	5,000
PHOENIX RESCUE MISSION 1801 S 35TH AVE PHOENIX,AZ 85009	N/A	PC	General & Unrestricted	1,100
PORTLAND STAGE COMPANY INC PO BOX 1458 PORTLAND,ME 04104	N/A	PC	Theater for Kids Program	1,000
PRESBYTERIAN HOMES FOUNDATION 2845 N HAMLINE AVE ROSEVILLE,MN 55113	N/A	PC	General & Unrestricted	1,000
Total  3a				460,905


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PROJECT HEALING WATERS FLY FISHING INC PO BOX 695 LA PLATA,MD 20646	N/A	PC	New England Region, ME Program	2,000
REGIONAL FOOD BANK OF OKLAHOMA 3355 S PURDUE ST OKLAHOMA CITY,OK 73179	N/A	PC	General & Unrestricted	500
RONNY THERIOT COMM PROJECTS FD A NON-PROFIT corp 216 TERESA DR ST MARTINVILLE,LA 70582	N/A	PC	General & Unrestricted	5,000
SAVE THE CHILDREN FEDERATION INC 54 WILTON RD WESTPORT,CT 06880	N/A	PC	Haiyan Fund	28,932
SCHOOLHOUSE ARTS CENTER AT SEBAGO LAKE PO BOX 140 STANDISH,ME 04084	N/A	PC	Education Program	2,000
SECOND HARVEST FOODBANK OF SOUTHERN WISCONSIN 2802 DAIRY DR MADISON,WI 53718	N/A	PC	General & Unrestricted	500
SHAW HOUSE 136 UNION ST BANGOR,ME 04401	N/A	PC	Mason Place Transitional Living Program	3,000
SHEARITH ISRAEL CONGREGATION 5825 PARK HEIGHTS AVE BALTIMORE,MD 21215	N/A	PC	General & Unrestricted	250
SIGNATURE BAND & CHOIR CAMP INC 118 JULIAN PL 229 SYRACUSE,NY 13210	N/A	PC	Signature Syracuse Program	1,650
SOCIety OF ST VINCENT DE PAUL SW IDAHO DISTrict 3217 W OVERLAND RD BOISE,ID 83705	N/A	PC	Food Bank and Low income Individual Assistance Programs	5,000
SPIERINGS CANCER FOUNDATION 810 DEPOT ST LITTLE CHUTE,WI 54140	N/A	PC	General & Unrestricted	2,500
SPINA BIFIDA ASSOCIATION OF WESTERN PENNSYLVANIA 1158 DUTILH RD MARS,PA 16046	N/A	PC	General & Unrestricted	100
SPRINGFIELD SCHOOL VOLUNTEERS INC 1550 MAIN ST SPRINGFIELD,MA 01103	N/A	PC	Brookings Walking Program	1,000
ST JOHNS UNIVERSITY - SCHOOL OF RISK MANAGEMENT 101 MURRAY ST NEW YORK,NY 10007	N/A	PC	General & Unrestricted	25,000
ST JUDE CHILDRENS RESEARCH HOSPITAL INC 262 DANNY THOMAS PL MSC 512 MEMPHIS,TN 38105	N/A	PC	General & Unrestricted	3,350
Total  3a				460,905

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ST MARYS FOOD BANK ALLIANCE 2831 N 31ST AVE PHOENIX,AZ 85009	N/A	PC	General & Unrestricted	1,000
SUDBURY FOR WOUNDED WARRIORS PO BOX 1166 SUDBURY,MA 01776	N/A	PC	General & Unrestricted	1,725
SUSAN L CURTIS CHARITABLE FOUNDATION 1321 WASHINGTON AVE STE 104 PORTLAND,ME 04103	N/A	PC	Camp Susan Curtis Program	6,000
TEACH FOR AMERICA - CONNECTICUT 142 TEMPLE ST STE 303 NEW HAVEN,CT 06511	N/A	PC	General & Unrestricted	10,000
TEDDY BEAR CANCER FOUNDATION 2320 BATH ST SANTA BARBARA,CA 93105	N/A	PC	General & Unrestricted	2,500
TELLING ROOM 225 COMMERCIAL ST STE 201 PORTLAND,ME 04101	N/A	PC	Young Writers and Leaders Program	2,000
THE CHILDRENS HOSPITAL OF PHILADELPHIA FOUNDATION 34TH ST CIVIC CENTER BLVD PHILADELPHIA,PA 19104	N/A	PC	General & Unrestricted	5,750
THE FOUNDATION FOR MAINE COMMUNITY COLLEGES 54 LIGHTHOUSE CIR S PORTLAND,ME 04106	N/A	PC	General & Unrestricted	8,000
THE NEIGHBORHOOD DEVELOPERS INC 4 GERRISH AVE CHELSEA,MA 02150	N/A	PC	CONNECT, Inc Program	1,000
THE WAYNESBURG UNIVERSITY 51 W COLLEGE ST WAYNESBURG,PA 15370	N/A	PC	Scholarship Fund	500
TREASURE VALLEY FAMILY YMCA 1177 W STATE ST BOISE,ID 83702	N/A	PC	Strong Kids Campaign	3,000
UNITED CARE USA 613 COLTS NECK CT COLLEYVILLE,TX 76034	N/A	PC	General & Unrestricted	500
UNITED CEREBRAL PALSY & HANDICAPPED CHLDRNS ASSO c 1603 COURT ST SYRACUSE,NY 13208	N/A	PC	Inclusive Special Education- Exploring Your World Program	2,200
UNITED SERVICE ORGANIZATIONS INC PO BOX 96860 WASHINGTON,DC 20077	N/A	PC	General & Unrestricted	2,500
UNITED WAY OF CENTRAL OKLAHOMA 1444 NW 28TH ST OKLAHOMA CITY,OK 73106	N/A	PC	May Tornadoes Relief Fund	250
Total  3a				460,905

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNITY HOUSE OF CAYUGA COUNTY INC 34 WRIGHT AVE STE C AUBURN,NY 13021	N/A	PC	Unity Employment Services Program	1,650
URBANDALE FOOD PANTRY 7611 DOUGLAS AVE STE 34/35 URBANDALE,IA 50322	N/A	PC	General & Unrestricted	1,000
VARIETY THE CHILDRENS CHARITY OF IOWA 505 5TH AVE STE 310 DES MOINES,IA 50309	N/A	PC	General & Unrestricted	1,500
VETERAN HOMESTEAD INC 69 HIGH ST REAR DOOR FITCHBURG,MA 01420	N/A	PC	Veteran Victory Farm Program	5,000
VETERANS INC 69 GROVE ST WORCESTER,MA 01605	N/A	PC	Employment and Training Program	1,600
VISITING NURSE ASSOCIATION OF CENTRAL PA INC 3315 DERRY ST HARRISBURG,PA 17111	N/A	PC	West Shore Senior Center	100
VISITING NURSE SERVICES OF IOWA 1111 9TH ST STE 320 DES MOINES,IA 50314	N/A	PC	General & Unrestricted	500
VITAS COMM CONNECTION - INNOVATIVE HOSPICE CARE 2201 LUCIEN WAY STE 100 MAITLAND,FL 32751	N/A	PC	General & Unrestricted	250
WAYSIDE FOOD PROGRAMS PO BOX 1278 PORTLAND,ME 04104	N/A	PC	Community Gardens Program	1,600
WESLEYAN UNIVERSITY The Wesleyan Fund 318 HIGH ST MIDDLETOWN,CT 06459	N/A	PC	Green Street Arts Center - Art & Science After School Program	1,000
WINTERKIDS EDUCATION FOUNDATION 120 EXCHANGE ST PORTLAND,ME 04112	N/A	PC	General & Unrestricted	2,000
WOMENS CENTER OF GREATER DANBURY CONN INC 2 WST DANBURY,CT 06810	N/A	PC	Community Education Program	2,300
YOUNG WOMENS CHRISTIAN ASSOCIATION OF RICHMOND 6 N 5TH ST RICHMOND,VA 23219	N/A	PC	General & Unrestricted	500
YOUTH EMERGENCY SERVICES & SHELTER OF IOWA 918 SE 11TH ST DES MOINES,IA 50309	N/A	PC	General & Unrestricted	1,000
Total  3a				460,905

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

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2013

Name of the organization WR Berkley Corporation Charitable Foundation	Employer identification number 36-4516560
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Organization type (check one)

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

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

General Rule

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

Special Rules

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

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

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

Name of organization WR Berkley Corporation Charitable Foundation	Employer identification number 36-4516560
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Part II	Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed		
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____

Name of organization WR Berkley Corporation Charitable Foundation	Employer identification number 36-4516560
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Part III

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

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

Use duplicate copies of Part III if additional space is needed

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
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<div></div> <div></div>		<div></div> <div></div> <div></div>	

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

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

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

TY 2013 Depreciation Schedule

Name: WR Berkley Corporation Charitable
Foundation

EIN: 36-4516560

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
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TY 2013 Investments - Land Schedule

Name: WR Berkley Corporation Charitable
Foundation

EIN: 36-4516560

TY 2013 Land, Etc. Schedule

Name: WR Berkley Corporation Charitable
Foundation

EIN: 36-4516560

TY 2013 Other Expenses Schedule

Name: WR Berkley Corporation Charitable
Foundation

EIN: 36-4516560

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative Fees	3,000			3,000
State or Local Filing Fees	25			25

TY 2013 Other Increases Schedule

Name: WR Berkley Corporation Charitable
Foundation
EIN: 36-4516560

Description	Amount
RETURNED GRANTS	11,500

TY 2013 Substantial Contributors Schedule

Name: WR Berkley Corporation Charitable
Foundation

EIN: 36-4516560

Name	Address
BERKLEY INSURANCE CO	475 STEAMBOAT RD GREENWICH, CT 06830

TY 2013 Taxes Schedule

Name: WR Berkley Corporation Charitable
Foundation
EIN: 36-4516560

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
990-PF Excise Tax for 2012	1			