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Return of Private Foundation

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

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

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation JEROME H. STONE FAMILY FOUNDATION C/O JEROME H. STONE ALZHEIMER'S ASSOC.		A Employer identification number 36-6061300
Number and street (or P.O. box number if mail is not delivered to street address) 225 N. MICHIGAN AVE, 17TH FLOOR	Room/suite	B Telephone number (312) 335-5808
City or town, state or province, country, and ZIP or foreign postal code CHICAGO, IL 60601		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 5,808,440.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	1,125,142.			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	18,797.	18,797.		STATEMENT 2
	4 Dividends and interest from securities	54,551.	54,551.		STATEMENT 3
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	274,915.			STATEMENT 1
	b Gross sales price for all assets on line 6a	2,231,544.			
	7 Capital gain net income (from Part IV, line 2)		1,426,777.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total Add lines 1 through 11	1,473,405.	1,500,125.	0.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 4	246.	61.	0.	185.
	b Accounting fees STMT 5	5,000.	1,500.	0.	3,500.
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 6	14,588.	588.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 7	16,636.	16,636.	0.	0.
	24 Total operating and administrative expenses Add lines 13 through 23	36,470.	18,785.	0.	3,685.
	25 Contributions, gifts, grants paid	281,794.			281,794.
26 Total expenses and disbursements Add lines 24 and 25	318,264.	18,785.	0.	285,479.	
27 Subtract line 26 from line 12	1,155,141.				
a Excess of revenue over expenses and disbursements		1,481,340.			
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)			0.		

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JEROME H. STONE FAMILY FOUNDATION
C/O JEROME H. STONE ALZHEIMER'S ASSOC.

36-6061300

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		178,589.	416,036.	416,036.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations STMT 9		441,502.	1,084,759.	1,073,726.
	b	Investments - corporate stock STMT 10		2,104,770.	2,751,432.	4,317,946.
	c	Investments - corporate bonds				
	Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less: accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other				
14		Land, buildings, and equipment: basis ▶				
		Less: accumulated depreciation ▶				
15		Other assets (describe ▶ STATEMENT 11)		664.	732.	732.
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)		2,725,525.	4,252,959.	5,808,440.
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons		256,000.	391,000.	STATEMENT 12
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		256,000.	391,000.	
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		0.	0.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		214,258.	451,551.	
	29	Retained earnings, accumulated income, endowment, or other funds		2,255,267.	3,410,408.	
30	Total net assets or fund balances		2,469,525.	3,861,959.		
31	Total liabilities and net assets/fund balances		2,725,525.	4,252,959.		

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	2,469,525.
2	Enter amount from Part I, line 27a	2	1,155,141.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	237,293.
4	Add lines 1, 2, and 3	4	3,861,959.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	3,861,959.

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			
b SEE ATTACHED STATEMENT			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 2,231,544.		804,767.	1,426,777.

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			1,426,777.

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	1,426,777.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	365,165.	3,427,578.	.106537
2011	397,875.	3,069,115.	.129638
2010	424,355.	2,859,934.	.148379
2009	360,859.	2,602,077.	.138681
2008	433,084.	3,161,528.	.136986

2 Total of line 1, column (d)	2	.660221
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	.132044
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	4,695,539.
5 Multiply line 4 by line 3	5	620,018.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	14,813.
7 Add lines 5 and 6	7	634,831.
8 Enter qualifying distributions from Part XII, line 4	8	285,479.

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	29,627.
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	29,627.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	29,627.
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	6,526.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	40,000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	46,526.	
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		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	16,899.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax ☐ 16,899. Refunded ☐	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☐ \$ 0. (2) On foundation managers. ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ IL		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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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? Website address ▶ <u>N/A</u>	13	X	
14	The books are in care of ▶ <u>JEROME H. STONE</u> Telephone no. ▶ <u>312-335-5808</u> Located at ▶ <u>225 N. MICHIGAN AVE, 17TH FLOOR, CHICAGO, IL</u> ZIP+4 ▶ <u>60601</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 <u>N/A</u>			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶	16	Yes	No
				X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 ▶ _____, _____, _____		
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.) <u>N/A</u>	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ _____, _____, _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ 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) <u>N/A</u>	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

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

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

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

N/A

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

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?

N/A

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.

(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
JEROME H STONE 225 N. MICHIGAN AVENUE, 17TH FLOOR CHICAGO, IL 60601	PRESIDENT 1.00	0.	0.	0.
CYNTHIA RASKIN 225 N. MICHIGAN AVENUE, 17TH FLOOR CHICAGO, IL 60601	SECRETARY 1.00	0.	0.	0.
JAMES H STONE 225 N. MICHIGAN AVENUE, 17TH FLOOR CHICAGO, IL 60601	TREASURER 1.00	0.	0.	0.
ELLEN STONE BELIC 225 N. MICHIGAN AVENUE, 17TH FLOOR CHICAGO, IL 60601	VICE PRESIDENT 1.00	0.	0.	0.

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

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

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

0

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

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

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

Total number of others receiving over \$50,000 for professional services 0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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	4,362,652.
b	Average of monthly cash balances	1b	403,661.
c	Fair market value of all other assets	1c	732.
d	Total (add lines 1a, b, and c)	1d	4,767,045.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	4,767,045.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	71,506.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,695,539.
6	Minimum investment return. Enter 5% of line 5	6	234,777.

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	234,777.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	29,627.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	29,627.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	205,150.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	205,150.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	205,150.

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	285,479.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	285,479.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	285,479.

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				205,150.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008	436,037.			
b From 2009	361,452.			
c From 2010	425,878.			
d From 2011	252,321.			
e From 2012	198,340.			
f Total of lines 3a through e	1,674,028.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ \$	285,479.			
a Applied to 2012, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				205,150.
e Remaining amount distributed out of corpus	80,329.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus: Add lines 3f, 4c, and 4e. Subtract line 5	1,754,357.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	436,037.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	1,318,320.			
10 Analysis of line 9:				
a Excess from 2009	361,452.			
b Excess from 2010	425,878.			
c Excess from 2011	252,321.			
d Excess from 2012	198,340.			
e Excess from 2013	80,329.			

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

1 a 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)

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

Part XV Supplementary Information (Complete this part only if the 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).)

JEROME H STONE

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:

JEROME H STONE, 312-335-5808
225 N. MICHIGAN AVE, 17TH FLOOR, CHICAGO, IL 60601

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

N/A

c Any submission deadlines:

N/A

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

N/A

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 ATTACHED	NONE	PUBLIC	CHARITABLE	281,794.
Total			3a	281,794.
b Approved for future payment				
NONE				
Total			3b	0.

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash		X
	(2) Other assets		X
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization		X
	(2) Purchases of assets from a noncharitable exempt organization		X
	(3) Rental of facilities, equipment, or other assets		X
	(4) Reimbursement arrangements		X
	(5) Loans or loan guarantees		X
	(6) Performance of services or membership or fundraising solicitations		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees		X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.				May the IRS discuss this return with the preparer shown below (see instr.)? ☒ Yes ☐ No		
	Signature of officer or trustee <i>[Signature]</i>		Date <i>11/15/14</i>		Title <i>Preparer</i>		
Paid Preparer Use Only	Print Type preparer's name		Preparer's signature		Date	Check ☐ if self-employed	PTIN
	AUDREY R. PFEIFFER		<i>[Signature]</i>		11-13-14		P00932902
	Firm's name ► MCGLADREY LLP					Firm's EIN ► 42-0714325	
	Firm's address ► 1 S.WACKER DRIVE, STE 800 CHICAGO, IL 60606					Phone no. 312-634-3400	

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.
▶ 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

JEROME H. STONE FAMILY FOUNDATION
C/O JEROME H. STONE ALZHEIMER'S ASSOC.

Employer identification number

36-6061300

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 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 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).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization JEROME H. STONE FAMILY FOUNDATION C/O JEROME H. STONE ALZHEIMER'S ASSOC.	Employer identification number 36-6061300
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	TWO TWELVE INVESTMENT CORP. 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	\$ 180,349.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
2	JERRELYN 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	\$ 57,874.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
3	DRAKE LP 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	\$ 313,131.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
4	212 LP 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	\$ 178,159.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
5	ELLEN STONE BELIC 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	\$ 69,366.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
6	ELLEN STONE BELIC 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	\$ 180,506.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

JEROME H. STONE FAMILY FOUNDATION
C/O JEROME H. STONE ALZHEIMER'S ASSOC.

Employer identification number

36-6061300

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	ELLEN STONE BELIC 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	\$ 125,350.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
8	JAMES STONE 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	\$ 20,407.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization

JEROME H. STONE FAMILY FOUNDATION
C/O JEROME H. STONE ALZHEIMER'S ASSOC.

Employer identification number

36-6061300

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
1	2,761 SHS DISCOVERY COMMUNICATIONS	\$ 180,349.	06/12/13
2	886 SHS DISCOVERY COMMUNICATIONS	\$ 57,874.	06/12/13
3	4,550 SHS DISCOVERY COMMUNICATIONS	\$ 313,131.	06/17/13
4	2,650 SHS DISCOVERY COMMUNICATIONS	\$ 178,159.	06/24/13
5	828 SHS LIBERTY GLOBAL PLC	\$ 69,366.	12/04/13
6	2,309 SHS DISCOVERY COMMUNICATIONS	\$ 180,506.	12/04/13

Employer identification number

36-6061300

Pàrt II

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
7	1,672 SHS LIBERTY GLOBAL INC	\$ 125,350.	05/24/13
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
8	1,035 SHS NV ENERGY INC	\$ 20,408.	03/22/13
(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

JEROME H. STONE FAMILY FOUNDATION
C/O JEROME H. STONE ALZHEIMER'S ASSOC.

Employer identification number

36-6061300

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) ► \$

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

FORM 990-PF

GAIN OR (LOSS) FROM SALE OF ASSETS

STATEMENT 1

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
HARRIS SEE ATTACHED STATEMENT					
	2,117,510.	1,936,221.	0.	0.	181,289.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
ACORN APP FUND - CAPITAL GAIN DISTRIBUTIONS					
	45,110.	0.	0.	0.	45,110.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
ARIEL APP FUND - CAPITAL GAIN DISTRIBUTIONS					
	1,945.	0.	0.	0.	1,945.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
INVESTMENT CO AMER. - CAPITAL GAIN DISTRIBUTIONS	30,095.	0.	0.	0.	30,095.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
VANGUARD - CAPITAL GAIN DISTRIBUTIONS	9.	0.	0.	0.	9.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
OAKMARK - CAPITAL GAIN DISTRIBUTION	6,926.	0.	0.	0.	6,926.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
FIDELITY - CAPITAL GAIN DISTRIBUTION	9,541.	0.	0.	0.	9,541.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD	
1,035 SHS NV ENERGY INC	DONATED	VARIOUS	03/22/13	
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
20,408.	20,408.	0.	0.	0.
CAPITAL GAINS DIVIDENDS FROM PART IV				0.
TOTAL TO FORM 990-PF, PART I, LINE 6A				274,915.

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 2

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
ACCRUED INTEREST PAID	-658.	-658.	-658.
INTEREST INCOME	19,391.	19,391.	19,391.
IRS INTEREST	64.	64.	64.
TOTAL TO PART I, LINE 3	18,797.	18,797.	18,797.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ACORN	746.	0.	746.	746.	746.
ARIEL APP FUND	1,228.	0.	1,228.	1,228.	1,228.
ARIEL FUND	519.	0.	519.	519.	519.
AT&T	252.	0.	252.	252.	252.
COMCAST	340.	0.	340.	340.	340.
FIDELITY	1,946.	0.	1,946.	1,946.	1,946.
HARRIS	40,843.	0.	40,843.	40,843.	40,843.
INVESTMENT CO AMER	7,515.	0.	7,515.	7,515.	7,515.
OAKMARK	1,111.	0.	1,111.	1,111.	1,111.
VANGUARD MM	51.	0.	51.	51.	51.
TO PART I, LINE 4	54,551.	0.	54,551.	54,551.	54,551.

FORM 990-PF	LEGAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL EXPENSE	246.	61.	0.	185.
TO FM 990-PF, PG 1, LN 16A	246.	61.	0.	185.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING EXPENSE	5,000.	1,500.	0.	3,500.
TO FORM 990-PF, PG 1, LN 16B	5,000.	1,500.	0.	3,500.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	588.	588.	0.	0.
EXCISE TAXES PAID	14,000.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	14,588.	588.	0.	0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT COUNSELING	15,972.	15,972.	0.	0.
MISC. EXPENSES	664.	664.	0.	0.
TO FORM 990-PF, PG 1, LN 23	16,636.	16,636.	0.	0.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
DIFFERENCE BETWEEN FMV AND COST BASIS OF DONATED SECURITY	237,293.
TOTAL TO FORM 990-PF, PART III, LINE 3	237,293.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	9
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
FEDERAL HOME LOAN BANK 3.35% 6/26/14	X		50,632.	50,774.
FEDERAL HOME LOAN BANK 4.875% 11/27/13	X		0.	0.
FEDERAL HOME LOAN BANK 4.875% 12/13/13	X		0.	0.
FHLB QC 12/13 MSTEP 6/16 - 1.000% 12/12/19	X		99,660.	96,700.
FHLMC QC 6/14 MSTEP 12/14 - 1.000% 12/26/18	X		125,010.	125,000.
FMNA QC - 1.500% 08/28/18	X		100,490.	99,773.
FNMA 1XC - 1.000% 09/20/17	X		124,413.	123,894.
FNMA ACB CD14 MSTEP - 1.375% 07/18/18	X		124,823.	125,356.
FNMA CD144 MSTEP - 0.500% 07/25/17	X		74,785.	74,775.
FNMA QC 09/27/13 - 1.500% 09/27/19	X		99,985.	95,000.
FNMA QC 1.5% 10/26/17	X		0.	0.
FNMA QC 4/17/14 CD 14 - 2.000% 01/17/19	X		125,010.	123,595.
GLENDALE HTS UTGO BAB IL - 4% 12/15/16	X		80,636.	80,480.
NYC UTGO TXBL SER F2 NY - 3.17% 12/01/15	X		79,315.	78,379.
TOTAL U.S. GOVERNMENT OBLIGATIONS			1,084,759.	1,073,726.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,084,759.	1,073,726.

FORM 990-PF

CORPORATE STOCK

STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AFLAC	112,847.	133,600.
AMERICAN FDS/INVEST CO OF AMERICAN	364,767.	473,179.
AMERICAN INTL GROUP	89,124.	127,625.
APACHE CORP	0.	0.
ARIEL APPRECIATION FUND	30,872.	46,547.
ARIEL FUND	50,459.	94,058.
AT&T	15,700.	4,922.
BRISTOL MYERS SQUIBB	0.	0.
CARNIVAL	0.	0.
CENOVUS ENERGY	65,704.	63,030.
COMCAST CORP	32,284.	79,585.
CONAGRA FOODS	0.	0.
COVIDIEN LTD	21,104.	40,860.
DIAGEO PLC	17,004.	52,968.
DISCOVERY COMM CL A	0.	0.
EXXON MOBIL	52,948.	131,560.
FIDELITY INVESTMENTS	95,201.	155,212.
FOREST LABORATORIES	84,636.	132,066.
GE CAPITAL RETAIL BANK CD 2.3% 8/13/2015	77,695.	76,747.
GOLDMAN SACHS BANK CD 1.35% 11/14/2016	75,010.	75,212.
HJ HEINZ	0.	0.
HOME DEPOT	22,720.	65,872.
HOWARD HUGHES	45,315.	84,070.
ILLINOIS TOOL WORKS	52,212.	92,488.
INTEL CORP	110,002.	129,800.
JP MORGAN	84,304.	134,504.
LIBERTY FUNDS / ACORN FUND Z	400,013.	765,941.
MCDONALDS	12,486.	58,218.
MEDTRONIC	76,261.	114,780.
MERCK	14,238.	49,049.
NATIONAL OILWELL VARCO	110,646.	127,248.
NESTLE	43,663.	88,308.
OAKMARK FUND	84,426.	183,170.
OMNICARE INC	56,311.	108,648.
ORACLE	116,621.	133,910.
TD AMERITRADE	60,616.	76,600.
TENET HEALTHCARE	28,013.	67,392.
TEXAS INSTRUMENTS	65,856.	100,993.
UNILEVER	93,061.	115,360.
VANGUARD VFSIF ST CORP	2,713.	2,764.
WELLS FARGO	86,600.	131,660.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,751,432.	4,317,946.

FORM 990-PF

OTHER ASSETS

STATEMENT 11

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
OTHER ASSETS	664.	305.	305.
ACCRUED INTEREST	0.	427.	427.
TO FORM 990-PF, PART II, LINE 15	664.	732.	732.

FORM 990-PF

LOANS PAYABLE TO OFFICERS, DIRECTORS, ETC.

STATEMENT 12

LENDER'S NAME AND TITLE

JERRELYN

DATE OF NOTE	MATURITY DATE	INTEREST RATE
-----------------	------------------	------------------

05/29/13	12/31/14	.00%
----------	----------	------

TERMS OF REPAYMENT

IN FULL AT MATURITY

SECURITY PROVIDED BY BORROWER

NONE

PURPOSE OF LOAN

PROVIDE TEMPORARY OPERATING FUNDS

DESCRIPTION OF CONSIDERATION	FMV OF CONSIDERATION	ORIGINAL LOAN AMOUNT	BALANCE DUE
CASH - \$381,000	381,000.	381,000.	381,000.

LENDER'S NAME AND TITLE

TWO TWELVE INVESTMENT CORP

DATE OF NOTE	MATURITY DATE	INTEREST RATE
-----------------	------------------	------------------

01/01/13	12/31/14	.00%
----------	----------	------

TERMS OF REPAYMENT

IN FULL AT MATURITY

SECURITY PROVIDED BY BORROWER

NONE

PURPOSE OF LOAN

PROVIDE TEMPORARY OPERATING FUNDS

DESCRIPTION OF CONSIDERATION	FMV OF CONSIDERATION	ORIGINAL LOAN AMOUNT	BALANCE DUE
CASH - \$10,000	10,000.	10,000.	10,000.

TOTAL TO FORM 990-PF, PART II, LINE 20, COLUMN B

391,000.

JEROME H. STONE FAMILY FOUNDATION**FEIN#36-6061300****2013 Form 990PF, Part XV, Supplementary Information, 3. Grants and Contributions Paid During the Year:**

Date	Name	Amount
1/25/2013	Children's Research	500 00
1/25/2013	Impact, Inc	500 00
1/25/2013	Circle Foundation Innovative School	1,000 00
1/25/2013	Lincoln Park Village	250 00
2/12/2013	Art Institute of Chicago	2,500 00
2/12/2013	Innovations High School	5,000 00
2/12/2013	Lyric Opera House	1,150 00
2/12/2013	Ravinia Annual Fund	3,500 00
2/12/2013	Evans Scholars Foundation	200 00
2/28/2013	Desert Community Foundation	250.00
4/1/2013	Museum of Contemporary Art	500 00
4/1/2013	Lyric Opera House	3,500 00
4/1/2013	Grant Park Music Festival	1,470 00
4/1/2013	Jewish Child and Family Services	3,000 00
4/1/2013	AARP Foundation	20 00
4/1/2013	Chicago Symphony	1,500 00
4/5/2013	Cinema/Chicago	7,500 00
5/14/2013	Riders Alliance	50,000 00
5/14/2013	Steppenwolf Theatre Company	1,500 00
5/14/2013	Museum of Contemporary Art	5,000 00
5/14/2013	Lincoln Park Village	1,000 00
5/14/2013	Columbia College Chicago	2,500.00
5/14/2013	Riders Alliance	20,000 00
5/31/2013	Riders Alliance	5,000.00
5/31/2013	Chicago Humanities Festival	12,500 00
5/31/2013	Chicago Symphony	5,000.00
5/31/2013	Illinois Humanities Council	750 00
5/31/2013	The Sustaining Fellows	1,500 00
5/31/2013	Lambda Legal	40 00
5/31/2013	League of Women Voters of United States	75 00
5/31/2013	Jewish Council for Youth Services	500 00
5/31/2013	MADD	35 00
5/31/2013	Planned Parenthood-Chicago Area	100 00
5/31/2013	Southern Poverty Law Center	150.00
5/31/2013	World Jewish Congress	100 00
5/31/2013	Palm Springs Friends of Philharmonic	1,500 00
6/18/2013	Doctors Without Borders	100 00
6/18/2013	WTTW Channel 11	500 00
6/18/2013	Project Keshet	50 00
7/9/2013	Chicago Council on Global Affairs	1,000 00
7/10/2013	ADL	200 00
7/10/2013	Emergency Fund for Needy People	1,500 00
7/10/2013	Human Rights Watch	500 00
8/6/2013	World Jewish Congress	0 00
8/6/2013	Barbara Sinatra Children's Center	1,000 00
8/6/2013	AARP	25 00
8/6/2013	Northwestern University Leadership Circle	500 00
8/6/2013	Oxfam America	50 00
8/6/2013	North Shore Congregation Israel	2,738 00

8/6/2013 Pilgrim Chamber Players	500 00
8/12/2013 Loyola University	1,000 00
8/20/2013 Human Rights Watch	10,000 00
9/23/2013 Human Rights Watch	5,000 00
9/23/2013 Doctors Without Borders	200 00
9/26/2013 Cinema/Chicago	1,000 00
10/10/2013 Lincoln Park Village	1,000 00
10/25/2013 National Strategy Forum	250 00
10/31/2013 Recycle the Raindrops, Inc	10,000 00
11/11/2013 Chicago Council on Global Affairs	1,000 00
11/11/2013 Parkinson Research Foundation	25 00
11/11/2013 JVS	750 00
12/23/2013 Alzheimer's assoc Evelyn T Stone Fund	8,000 00
12/23/2013 Jewish United Fund	10,000 00
12/23/2013 Alzheimer's assoc. Evelyn T Stone Fund	8,000 00
12/23/2013 Jewish United Fund	0 00
12/23/2013 Jewish United Fund	10,000 00
12/23/2013 Alzheimer's assoc Evelyn T Stone Fund	8,000 00
12/23/2013 Jewish United Fund	15,000 00
12/23/2013 Museum of Contemporary Art	24,815 70
12/23/2013 Museum of Contemporary Art	0 00
12/23/2013 Jewish United Fund	15,000 00
12/31/2013 Harris Theatre	1,000 00
12/31/2013 Albany Park Theatre Project	1,000 00
12/31/2013 Women's Media Group Inc	2,500 00
Total	<u>281,793.70</u>

All of the above contributions are for the general charitable, religious, scientific, literary, or educational activities of each donee

All recipients are public charities as described in Sec 509(a)(1), (2) or (3).

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 HARRIS SEE ATTACHED STATEMENT		P		
b ACORN APP FUND - CAPITAL GAIN DISTRIBUTIONS		P	VARIOUS	12/31/13
c ARIEL APP FUND - CAPITAL GAIN DISTRIBUTIONS		P	VARIOUS	12/31/13
d INVESTMENT CO AMER. - CAPITAL GAIN DISTRIBUTIONS		P	VARIOUS	12/31/13
e VANGUARD - CAPITAL GAIN DISTRIBUTIONS		P	VARIOUS	12/31/13
f OAKMARK - CAPITAL GAIN DISTRIBUTION		P	VARIOUS	12/31/13
g FIDELITY - CAPITAL GAIN DISTRIBUTION		P	VARIOUS	12/31/13
h 1,035 SHS NV ENERGY INC		D	VARIOUS	03/22/13
i				
j				
k				
l				
m				
n				
o				

(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 2,117,510.		804,767.	1,312,743.
b 45,110.			45,110.
c 1,945.			1,945.
d 30,095.			30,095.
e 9.			9.
f 6,926.			6,926.
g 9,541.			9,541.
h 20,408.			20,408.
i			
j			
k			
l			
m			
n			
o			

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

(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	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			1,312,743.
b			45,110.
c			1,945.
d			30,095.
e			9.
f			6,926.
g			9,541.
h			20,408.
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }		2	1,426,777.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }		3	N/A

HARRIS ASSOCIATES L.P.
REALIZED GAINS AND LOSSES
STONE, JEROME H. FAMILY FDTN
PF 1766-180902 ESL/A1S DSFIXB
From 01-01-13 Through 12-31-13

Open Date	Close Date	Quantity	Security	Cost Basis	Amort. or Accretion	Proceeds	Gain Or Loss	
							Short Term	Long Term
09-10-08	01-02-13	1,500.00	Discovery Comm Cl C	24,174.69		89,905.13		65,730.44
03-12-09	01-02-13	790.00	Discovery Comm Cl C	11,613.00		47,350.04		35,737.04
10-01-08	01-02-13	1,710.00	Discovery Comm Cl C	24,259.31		102,491.85		78,232.54
02-15-07	01-02-13	400.00	McDonald's	18,061.71		35,906.19		17,844.48
10-01-08	02-07-13	400.00	Discovery Comm Cl C	5,674.69		25,278.47		19,603.78
02-15-07	02-07-13	200.00	McDonald's	9,030.86		18,894.37		9,863.51
09-21-11	02-07-13	25.00	Tenet Healthcare	450.50		979.48		528.98
09-21-11	02-07-13	225.00	Tenet Healthcare	3,939.27		8,815.35		4,876.08
11-04-11	02-07-13	100.00	Unilever (GB shs) ADR	3,330.04		3,967.93		637.89
03-27-12	02-07-13	100.00	Unilever (GB shs) ADR	3,312.05		3,967.93	655.88	
04-14-04	02-22-13	500.00	HJ Heinz	18,345.00		36,241.14		17,896.14
03-28-03	02-22-13	500.00	HJ Heinz	14,606.65		36,241.13		21,634.48
03-02-09	03-19-13	500.00	Apache	27,465.05		37,237.31		9,772.26
01-29-08	03-19-13	1,000.00	ConAgra Foods	21,336.80		35,044.21		13,707.41
01-29-08	03-19-13	400.00	ConAgra Foods	8,534.72		13,974.44		5,439.72
10-01-08	04-17-13	600.00	Discovery Comm Cl C	8,512.04		42,061.89		33,549.85
10-01-08	04-23-13	290.00	Discovery Comm Cl C	4,114.15		20,566.90		16,452.75
03-18-04	04-23-13	50.00	Discovery Comm Cl C	586.10		3,546.02		2,959.92
12-05-03	04-23-13	40.00	Discovery Comm Cl C	446.11		2,836.81		2,390.70
11-10-03	04-23-13	120.00	Discovery Comm Cl C	1,306.71		8,510.44		7,203.73
08-06-04	04-23-13	100.00	Discovery Comm Cl C	1,087.81		7,092.03		6,004.22
01-02-13	04-24-13	500.00	Carnival	18,658.75		16,681.98	-1,976.77	
03-28-12	04-24-13	200.00	Carnival	6,457.10		6,672.79		215.69
02-15-12	04-24-13	1,000.00	Carnival	30,392.69		33,363.97		2,971.28
02-15-12	04-24-13	300.00	Carnival	9,117.81		10,008.27		890.46
03-29-12	04-26-13	75,000	FNMA CD13	74,935.00	12.12	75,000.00		52.88
			1 500% Due 10-26-17					
01-31-06	05-09-13	800.00	Bristol-Myers Squibb	18,296.00		31,758.52		13,462.52
05-07-08	05-09-13	1,000.00	Bristol-Myers Squibb	22,810.00		39,698.15		16,888.15
05-28-09	05-28-13	1,672.00	Liberty Global Cl A	23,273.68		127,787.56		104,513.88
08-08-08	06-13-13	500.00	Discovery Comm Cl C	7,952.56		32,577.96		24,625.40
08-07-08	06-13-13	2,000.00	Discovery Comm Cl C	31,517.66		130,311.85		98,794.19
08-06-04	06-13-13	150.00	Discovery Comm Cl C	1,631.71		9,773.39		8,141.68
09-24-03	06-13-13	125.00	Discovery Comm Cl C	1,345.35		8,144.49		6,799.14
10-24-03	06-13-13	100.00	Discovery Comm Cl C	1,052.03		6,515.59		5,463.56
03-14-91	06-13-13	351.00	Discovery Comm Cl C	56.80		22,869.73		22,812.93
02-12-91	06-13-13	35.00	Discovery Comm Cl C	5.52		2,280.46		2,274.94
02-12-91	06-13-13	35.00	Discovery Comm Cl C	5.51		2,280.46		2,274.95
03-12-91	06-13-13	351.00	Discovery Comm Cl C	54.33		22,869.72		22,815.39
08-07-08	06-18-13	50.00	Discovery Comm Cl C	787.93		3,494.84		2,706.91
10-01-08	06-18-13	4,500.00	Discovery Comm Cl C	63,835.30		314,535.53		250,700.23
08-07-08	06-25-13	2,650.00	Discovery Comm Cl C	41,759.49		179,270.70		137,511.21
11-26-07	08-08-13	75.00	Mallinckrodt	2,021.84		3,388.92		1,367.08
08-12-13	08-12-13	51.30	Washington Mutual Litig	0.00		51.30	51.30	
			Consult Tax					
03-16-11	11-08-13	50,000	Norfolk UTGO TXBL CD13 VA	50,415.00	-415.00	50,000.00		0.00
			2.090% Due 01-01-14					
05-28-13	11-21-13	200.00	Illinois Tool Works	14,225.98		15,822.59	1,596.61	

This document is for informational purposes only. The information and calculations are based upon the records of Harris Associates L.P., which may be different than the information, calculations and records of the custodian of your account. Harris Associates L.P. does not make any representations or warranty as to the information and calculations herein and specifically disclaims any liability with regard to its use. Harris Associates L.P. urges you to consult your tax or legal advisers to assist you with your tax planning and reporting needs.

HARRIS ASSOCIATES L.P.
REALIZED GAINS AND LOSSES
STONE, JEROME H. FAMILY FDTN
PF 1766-180902 ESL/A1S DSFIXB
From 01-01-13 Through 12-31-13

Open Date	Close Date	Quantity	Security	Cost Basis	Amort. or Accretion	Proceeds	Gain Or Loss	
							Short Term	Long Term
01-02-13	11-21-13	100 00	Illinois Tool Works	6,189 08		7,911 30	1,722.22	
05-08-08	11-27-13	50,000	Fedl Home Ln Bks 4.875% Due 11-27-13	52,361.50	-2,361 50	50,000.00		0 00
03-12-09	12-05-13	999.00	Discovery Comm Cl C	14,686 26		77,971.59		63,285.33
11-12-02	12-05-13	5 00	Discovery Comm Cl C	47.17		390 25		343.08
07-18-02	12-05-13	1,305 00	Discovery Comm Cl C	11,036 50		101,854 78		90,818 28
05-28-09	12-05-13	828.00	Liberty Global Cl A	11,525 48		69,379.83		57,854 35
06-19-13	12-06-13	500 00	Forest Laboratories	20,784.95		28,278 42	7,493 47	
06-17-13	12-06-13	100 00	Forest Laboratories	4,133 83		5,655 68	1,521 85	
03-25-08	12-13-13	50,000	Fedl Home Ln Bks 4.875% Due 12-13-13	53,207 00	-3,207.00	50,000 00		0.00
TOTAL GAINS							13,041 32	1,307,649.41
TOTAL LOSSES							-1,976.77	0 00
				804,767.09	-5,971.38	2,117,509.68	11,064.55	1,307,649.41
TOTAL SUPERVISED REALIZED GAIN/LOSS 1,318,713.97								
NO CAPITAL GAINS DISTRIBUTIONS								

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Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

Department of the Treasury
Internal Revenue Service

► **File a separate application for each return.**
► Information about Form 8868 and its instructions is at www.irs.gov/form8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing (e-file) - You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

		Enter filer's identifying number
Type or print	Name of exempt organization or other filer, see instructions JEROME H. STONE FAMILY FOUNDATION C/O JEROME H. STONE ALZHEIMER'S ASSOC.	Employer identification number (EIN) or 36-6061300
	Number, street, and room or suite no. If a P.O. box, see instructions 225 N. MICHIGAN AVE, 17TH FLOOR	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions CHICAGO, IL 60601	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

JEROME H. STONE

- The books are in the care of ► **225 N. MICHIGAN AVE, 17TH FLOOR - CHICAGO, IL 60601**

Telephone No ► **312-335-5808**

Fax No ►

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1** I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2014**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ☒ calendar year **2013** or
- ☐ tax year beginning _____, and ending _____

- 2** If the tax year entered in line 1 is for less than 12 months, check reason ☐ Initial return ☐ Final return
- ☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	46,526.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	6,526.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	40,000.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box ☒ **X**
- Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868
- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions JEROME H. STONE FAMILY FOUNDATION	Employer identification number (EIN) or 36-6061300
	C/O JEROME H. STONE ALZHEIMER'S ASSOC..	
	Number, street, and room or suite no. If a P O box, see instructions 225 N. MICHIGAN AVE, 17TH FLOOR	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions. CHICAGO, IL 60601	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**JEROME H. STONE**

- The books are in the care of **225 N. MICHIGAN AVE, 17TH FLOOR - CHICAGO, IL 60601**
- Telephone No **312-335-5808** Fax No. _____

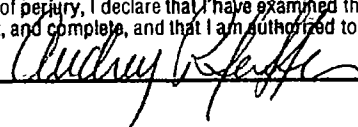
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- I request an additional 3-month extension of time until **NOVEMBER 15, 2014**.
- For calendar year **2013**, or other tax year beginning _____, and ending _____.
- If the tax year entered in line 5 is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period
- State in detail why you need the extension
ADDITIONAL TIME IS NEEDED TO GATHER THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN.

8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	46,526.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	46,526.
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature  Title **CPA** Date **8-13-14**

Form 8868 (Rev. 1-2014)