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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

Do not enter Social Security numbers on this form as it may be made public.

Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation <b>GOLDBERG FAMILY FOUNDATION</b>		A Employer identification number <b>43-6884613</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>C/O LYNN G INTRATER, 10412 METCALF</b>	Room/suite	B Telephone number <b>913-385-9997</b>
City or town, state or province, country, and ZIP or foreign postal code <b>OVERLAND PARK, KS 66212</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		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) \$ <b>3,313,197.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		65,373.	61,998.		STATEMENT 1
5a Gross rents		42,540.	42,540.		STATEMENT 2
b Net rental income or (loss) 42,540.					
6a Net gain or (loss) from sale of assets not on line 10		227,823.			
b Gross sales price for all assets on line 6a 919,413.					
7 Capital gain net income (from Part IV, line 2)			227,823.		
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		1,250.	0.		STATEMENT 3
12 Total. Add lines 1 through 11		336,986.	332,361.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		6,550.	3,275.		3,275.
c Other professional fees STMT 5		12,966.	6,483.		6,483.
17 Interest					
18 Taxes STMT 6		1,574.	374.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 7		1,064.	1,064.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		22,154.	11,196.		9,758.
25 Contributions, gifts, grants paid		232,156.			232,156.
26 Total expenses and disbursements. Add lines 24 and 25		254,310.	11,196.		241,914.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		82,676.			
b Net investment income (if negative, enter -0-)			321,165.		
c Adjusted net income (if negative, enter -0-)				N/A	

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10-10-13

LHA For Paperwork Reduction Act Notice, see instructions.

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10441028 144524 73973Q

2013.04030 GOLDBERG FAMILY FOUNDATION 73973Q1

g14-15

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**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
<b>Assets</b>			
1 Cash - non-interest-bearing	40,666.	118,300.	118,300.
2 Savings and temporary cash investments	83,663.	193,783.	193,783.
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			
b Investments - corporate stock <b>ATTACHMENT A - STMT 8</b>	1,563,792.	1,406,915.	2,054,326.
c Investments - corporate bonds <b>ATTACHMENT A - STMT 9</b>	369,759.	438,055.	435,187.
11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶			
12 Investments - mortgage loans			
13 Investments - other			
14 Land, buildings, and equipment: basis ▶ <b>670,679.</b>			
Less accumulated depreciation ▶	670,679.	670,679.	481,100.
15 Other assets (describe ▶ <b>STATEMENT 10</b> )	41,218.	30,501.	30,501.
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item 1)	2,769,777.	2,858,233.	3,313,197.
<b>Liabilities</b>			
17 Accounts payable and accrued expenses	349.	1,301.	
18 Grants payable			
19 Deferred revenue			
20 Loans from officers, directors, trustees, and other disqualified persons			
21 Mortgages and other notes payable			
22 Other liabilities (describe ▶ )			
23 <b>Total liabilities</b> (add lines 17 through 22)	349.	1,301.	
<b>Net Assets or Fund Balances</b>			
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	2,769,428.	2,856,932.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
30 <b>Total net assets or fund balances</b>	2,769,428.	2,856,932.	
31 <b>Total liabilities and net assets/fund balances</b>	2,769,777.	2,858,233.	

**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	2,769,428.
2 Enter amount from Part I, line 27a	2	82,676.
3 Other increases not included in line 2 (itemize) ▶ <b>PRIOR YEAR ADJUSTMENT</b>	3	4,828.
4 Add lines 1, 2, and 3	4	2,856,932.
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	2,856,932.

**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.)
<b>1a ADVANTAGE ADVISERS PRIVATE EQUITY</b>	P		
<b>b ADVANTAGE ADVISERS PRIVATE EQUITY</b>			
<b>c SEE ATTACHED LIST - ATTACHMENT B</b>	P		
<b>d SEE ATTACHED LIST - ATTACHMENT B</b>	P		
<b>e CAPITAL GAINS DIVIDENDS</b>			

(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)
<b>a 33.</b>			<b>33.</b>
<b>b</b>		<b>1,796.</b>	<b>&lt;1,796.&gt;</b>
<b>c 132,442.</b>		<b>123,689.</b>	<b>8,753.</b>
<b>d 786,937.</b>		<b>566,105.</b>	<b>220,832.</b>
<b>e 1.</b>			<b>1.</b>
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	
<b>a</b>			<b>33.</b>
<b>b</b>			<b>&lt;1,796.&gt;</b>
<b>c</b>			<b>8,753.</b>
<b>d</b>			<b>220,832.</b>
<b>e</b>			<b>1.</b>

<b>2</b> 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 }	<b>2</b>	<b>227,823.</b>
<b>3</b> 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	{ }	<b>3</b>	<b>N/A</b>

**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	249,824.	3,003,153.	.083187
2011	172,743.	3,024,854.	.057108
2010	163,923.	2,976,987.	.055063
2009	161,438.	2,864,850.	.056351
2008	182,107.	3,274,187.	.055619

<b>2</b> Total of line 1, column (d)	<b>2</b>	<b>.307328</b>
<b>3</b> 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	<b>3</b>	<b>.061466</b>
<b>4</b> Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	<b>4</b>	<b>3,203,472.</b>
<b>5</b> Multiply line 4 by line 3	<b>5</b>	<b>196,905.</b>
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	<b>3,212.</b>
<b>7</b> Add lines 5 and 6	<b>7</b>	<b>200,117.</b>
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	<b>241,914.</b>

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 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	3,212.
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	3,212.
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	3,212.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1,120.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	4,250.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	5,370.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" 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		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	2,158.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax	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
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 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) MO		
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>LYNN G INTRATER</u> Telephone no. ► <u>913-385-9996</u> Located at ► <u>10406 METCALF, OVERLAND PARK, KS</u> ZIP+4 ► <u>66212</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 ► <u>15</u> <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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 <u>N/A</u> ► <input type="checkbox"/>	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	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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

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**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

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

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

6b

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

X

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

7b

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

**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
LYNN G INTRATER 4805 W 112TH TERR LEAWOOD, KS 66211	TRUSTEE 0.00	0.	0.	0.
GERALDINE D GOLDBERG 4901 W 133RD ST #303 LEAWOOD, KS 66209	ADVISORY COMMITTEE MEMBER 0.00	0.	0.	0.
JOHN M GOLDBERG 12409 HIGH DRIVE LEAWOOD, KS 66202	ADVISORY COMMITTEE MEMBER 0.00	0.	0.	0.
ROBERT A GOLDBERG 2816 WELBORN ST DALLAS, TX 75219	ADVISORY COMMITTEE MEMBER 0.00	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	
<b>Total.</b> Add lines 1 through 3	0.

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	2,502,304.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	261,738.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	488,214.
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	3,252,256.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	3,252,256.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	48,784.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	3,203,472.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	160,174.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	160,174.
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5	<b>2a</b>	3,212.
<b>b</b>	Income tax for 2013. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	3,212.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	156,962.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	156,962.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	156,962.

**Part XII****Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	241,914.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	241,914.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	3,212.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	238,702.

**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
<b>1</b> Distributable amount for 2013 from Part XI, line 7				156,962.
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2013:				
<b>a</b> From 2008	20,028.			
<b>b</b> From 2009	19,543.			
<b>c</b> From 2010	16,772.			
<b>d</b> From 2011	24,172.			
<b>e</b> From 2012	101,830.			
<b>f</b> Total of lines 3a through e	182,345.			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4: ▶ \$	241,914.			
<b>a</b> Applied to 2012, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2013 distributable amount				156,962.
<b>e</b> Remaining amount distributed out of corpus	84,952.			
<b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	267,297.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> 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.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7	20,028.			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	247,269.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2009	19,543.			
<b>b</b> Excess from 2010	16,772.			
<b>c</b> Excess from 2011	24,172.			
<b>d</b> Excess from 2012	101,830.			
<b>e</b> Excess from 2013	84,952.			

## N/A

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

- (4) Gross investment income





<b>Part XVII</b>	<b>Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations</b>
------------------	--

- |          |  | Yes          | No       |
|----------|--|--------------|----------|
| <b>1</b> | 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?  |              |          |
| <b>a</b> | Transfers from the reporting foundation to a noncharitable exempt organization of:   |              |          |
|          | (1) Cash   | <b>1a(1)</b> | <b>X</b> |
|          | (2) Other assets   | <b>1a(2)</b> | <b>X</b> |
| <b>b</b> | Other transactions:  |              |          |
|          | (1) Sales of assets to a noncharitable exempt organization   | <b>1b(1)</b> | <b>X</b> |
|          | (2) Purchases of assets from a noncharitable exempt organization   | <b>1b(2)</b> | <b>X</b> |
|          | (3) Rental of facilities, equipment, or other assets   | <b>1b(3)</b> | <b>X</b> |
|          | (4) Reimbursement arrangements   | <b>1b(4)</b> | <b>X</b> |
|          | (5) Loans or loan guarantees   | <b>1b(5)</b> | <b>X</b> |
|          | (6) Performance of services or membership or fundraising solicitations   | <b>1b(6)</b> | <b>X</b> |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   | <b>1c</b>    | <b>X</b> |
| <b>d</b> | 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.

Signature of officer or trustee: X Cyren R. Inwater Justice Date: X 11/10/14 Title: X Justice

May the IRS discuss this return with the preparer shown below (see instr.)?

☒ Yes ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name <b>ANN M. SWARTS</b>	Preparer's signature <i>Ann M. Swarts</i>	Date <b>11/6/14</b>	Check <input type="checkbox"/> if self-employed	PTIN <b>P00435991</b>
Firm's name ▶ <b>CBIZ MHM, LLC</b>			Firm's EIN ▶ <b>34-1874260</b>	
Firm's address ▶ <b>11440 TOMAHAWK CREEK PARKWAY LEAWOOD, KS 66211</b>			Phone no. <b>913-234-1000</b>	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ADVANTAGE ADVISERS PRIVATE EQUITY PTNS - DIVIDENDS	20.	0.	20.	20.	
ADVANTAGE ADVISERS PRIVATE EQUITY PTNS - INTEREST	4.	0.	4.	4.	
CHARLES SCHWAB - ACCRUED INTEREST PURCHASED	<680.>	0.	<680.>	<680.>	
CHARLES SCHWAB - ACCRUED INTEREST PURCHASED TAX	<428.>	0.	<428.>	0.	
CHARLES SCHWAB - DIVIDENDS	49,383.	1.	49,382.	49,382.	
CHARLES SCHWAB - INTEREST	12,938.	0.	12,938.	12,938.	
CHARLES SCHWAB - OID INTEREST	331.	0.	331.	331.	
CHARLES SCHWAB - TAX EXEMPT INTEREST	3,803.	0.	3,803.	0.	
OPPENHEIMER - INTEREST	3.	0.	3.	3.	
TO PART I, LINE 4	65,374.	1.	65,373.	61,998.	

FORM 990-PF RENTAL INCOME STATEMENT 2

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
RETAIL PROPERTY, WICHITA, KS	1	42,540.
TOTAL TO FORM 990-PF, PART I, LINE 5A		42,540.

FORM 990-PF	OTHER INCOME	STATEMENT	3
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CHARLES SCHWAB	1,250.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	1,250.	0.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CBIZ - ACCOUNTING FEES	6,550.	3,275.		3,275.
TO FORM 990-PF, PG 1, LN 16B	6,550.	3,275.		3,275.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CHARLES SCHWAB INV MGMT FEES	12,966.	6,483.		6,483.
TO FORM 990-PF, PG 1, LN 16C	12,966.	6,483.		6,483.

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 TAX	374.	374.		0.
ESTIMATED EXCISE TAX	1,200.	0.		0.
TO FORM 990-PF, PG 1, LN 18	1,574.	374.		0.



FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ADVANTAGE ADVISORS PRIVATE EQ	852.	852.		0.	
INVESTMENT EXPENSES	212.	212.		0.	
TO FORM 990-PF, PG 1, LN 23	1,064.	1,064.		0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
COMMON STOCKS	1,406,915.	2,054,326.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,406,915.	2,054,326.		

FORM 990-PF	CORPORATE BONDS		STATEMENT	9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
FIXED INCOME	438,055.	435,187.		
TOTAL TO FORM 990-PF, PART II, LINE 10C	438,055.	435,187.		

FORM 990-PF	OTHER ASSETS		STATEMENT	10
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE	
ADVANTAGE ADVISERS PRIVATE EQ	12,865.	6,267.	6,267.	
ADVANTAGE ADVISERS PRIVATE EQ - OUTSIDE BASIS	28,353.	24,234.	24,234.	
TO FORM 990-PF, PART II, LINE 15	41,218.	30,501.	30,501.	

Goldberg Family Foundation  
43-6884613  
12/31/2013  
Grants and Contributions Paid During the Year

Organization	Address	Purpose	Amount
A B Freeman School of Business	New Orleans, LA	General Fund	500
Aids Service of Dallas	Dallas, TX	General Fund	7,500
American Cancer Society	Memam, KS	General Fund	1,500
American Civil Liberties	New York, NY	General Fund	1,000
American Jewish World Service	New York, NY	General Fund	500
American Red Cross	Kansas City, MO	General Fund	500
American Society for the Prevention of Cruelty to Animals	New York, NY	General Fund	1,000
Anti-Defamation League	New York, NY	General Fund	500
BU Hillel	Boston, MA	General Fund	1,000
Chabad House	Shawnee Mission, KS	General Fund	360
Copp	San Antonio, TX	General Fund	2,000
Congregation Beth El Binah	Dallas, TX	General Fund	1,000
Congregation Beth Shalom	Kansas City, MO	General Fund	16,366
Cristo Rey of Kansas City	Kansas City, MO	General Fund	250
Dallas Museum of Art	Dallas, TX	General Fund	1,000
Damon Runyon Cancer Research Foundation	New York, NY	General Fund	1,000
Guiding Eyes for the Blind	Yorktown Heights, NY	General Fund	500
Harvesters	Kansas City, MO	General Fund	3,500
Heifer International	Little Rock, AR	General Fund	1,000
Herzl Camp	St Louis Park, MN	General Fund	8,000
Hyman Brand Hebrew Academy	Overland Park, KS	General Fund	11,500
JCRB/AJC	Overland Park, KS	General Fund	2,250
Jewish Community Foundation	Overland Park, KS	General Fund	102,500
Jewish Family and Children Services	San Francisco, CA	General Fund	3,500
Jewish Federation of Greater Dallas	Dallas, TX	General Fund	1,000
Jewish Federation of Greater Kansas City	Overland Park, KS	General Fund	28,000
Jewish Vocational Service	Overland Park, KS	General Fund	3,000
Kansas City Hospice Foundation	Kansas City, MO	General Fund	2,100
Kauffman Center	Kansas City, MO	General Fund	4,000
KC Hospice and Palliative Care	Kansas City, MO	General Fund	2,350
KC Jewish Museum	Overland Park, KS	General Fund	4,800
Kera 13	Dallas, TX	General Fund	1,500
Lambda Legal	New York, NY	General Fund	1,500
Legal Hospice of Texas	Dallas, TX	General Fund	1,000
Maryland Hillel	College Park, MD	General Fund	1,000
Midwest Center for Holocaust Education	Overland Park, KS	General Fund	180
Mt Carmel Cemetery Fund	White Plains, KY	General Fund	500
Nature Conservancy	Arlington, VA	General Fund	1,000
Nelson Gallery Foundation	Kansas City, MO	General Fund	250
North Texas Food Bank	Dallas, TX	General Fund	2,000
Operation Breakthrough	Kansas City, MO	General Fund	500
Oxfam	London, England	General Fund	1,500
Pembroke Hill School	Kansas City, MO	General Fund	1,000
Planned Parenthood Federation of America	New York, NY	General Fund	500
Rose Brooks Center	Kansas City, MO	General Fund	500
Southern Poverty Law Center	Montgomery, AL	General Fund	500
Southwest Jewish Congress	Dallas, TX	General Fund	500
SPCA of Texas	Dallas, TX	General Fund	1,500
Union for Reform Judaism	New York, NY	General Fund	500
Wayside Waifs	Kansas City, MO	General Fund	1,000
World Jewish Congress	Jerusalem, Israel	General Fund	250
World Wildlife Fund	Washington, DC	General Fund	1,000
Total			232,156
To adjust for prior period transactions			
Total			232,156

**PARAGON CAPITAL MANAGEMENT, LLC**

**REALIZED GAINS AND LOSSES  
GOLDBERG FAMILY FOUNDATION  
6100-3020**

**C/O LYNN G. INTRATER**  
*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
08-30-2007	01-11-2013	100	ARCH CAP GROUP LTD NEW F	2,356		4,451		2,095
08-30-2007	01-11-2013	100	ARCH CAP GROUP LTD NEW F	2,356		4,451		2,095
08-30-2007	01-11-2013	100	ARCH CAP GROUP LTD NEW F	2,356		4,451		2,095
08-30-2007	01-11-2013	100	ARCH CAP GROUP LTD NEW F	2,356		4,451		2,095
08-26-2003	01-11-2013	200	COSTCO WHSL CORP NEW	6,285		20,121		13,835
11-29-2006	01-11-2013	300	C V S HEALTH CORPORATION	8,539		15,357		6,818
11-18-2008	01-15-2013	166	ENGILITY HLDGS INC	2,752		3,221		469
11-15-2006	01-18-2013	1,000 000	GEN ELEC CAP 5 875%33 SENIOR NTS DUE 02/18	24,572		25,000		427
05-25-2005	01-24-2013	200	FEDEX CORPORATION	17,706		20,411		2,704
08-10-2011	01-24-2013	100	TORTOISE ENERGY CAPITAL	2,423		3,046		623
08-10-2011	01-24-2013	459	TORTOISE ENERGY CAPITAL	11,122		13,984		2,862
08-10-2011	01-24-2013	441	TORTOISE ENERGY CAPITAL	10,681		13,436		2,755
01-06-2009	02-15-2013	760	FHLMC E96701 5%18 DUE 05/01/18	789	0	760		-29
02-19-2010	02-15-2013	597	5 000% Due 05-01-18 FHLMC E01479 3 5%18 DUE 09/01/18	610	0	597		-13
07-14-2009	02-15-2013	448	3.500% Due 09-01-18 FHLMC C90675 5%23 DUE 05/01/23	465	0	448		-17
08-30-2007	02-22-2013	100	5 000% Due 05-01-23 ARCH CAP GROUP LTD NEW F	2,356		4,822		2,466
08-30-2007	02-22-2013	100	ARCH CAP GROUP LTD NEW F	2,356		4,822		2,465
08-30-2007	02-22-2013	100	ARCH CAP GROUP LTD NEW F	2,356		4,822		2,465
08-30-2007	02-22-2013	100	ARCH CAP GROUP LTD NEW F	2,356		4,822		2,465
08-30-2007	02-22-2013	100	ARCH CAP GROUP LTD NEW F	2,356		4,822		2,465
08-25-2011	02-22-2013	500	CISCO SYSTEMS INC	7,558		10,433		2,874
02-13-2004	02-22-2013	100	CHEVRON CORPORATION	4,338		11,598		7,260
02-13-2004	02-22-2013	100	CHEVRON CORPORATION	4,338		11,598		7,260
10-15-2009	02-22-2013	100	JACOBS ENGINEERING GROUP	4,589		4,886		297
10-15-2009	02-22-2013	100	JACOBS ENGINEERING GROUP	4,589		4,886		297
10-15-2009	02-22-2013	100	JACOBS ENGINEERING GROUP	4,589		4,886		297
10-15-2009	02-22-2013	100	JACOBS ENGINEERING GROUP	4,589		4,885		296
10-15-2009	02-22-2013	100	JACOBS ENGINEERING GROUP	4,589		4,885		296

**PARAGON CAPITAL MANAGEMENT, LLC**

**REALIZED GAINS AND LOSSES  
GOLDBERG FAMILY FOUNDATION**

**6100-3020**

**C/O LYNN G. INTRATER**

*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
03-17-2009	02-25-2013	424	FNMA PL 888889 4.5%18 DUE 12/01/18	438	0	424		-14
01-11-2011	02-28-2013	250	JOHNSON & JOHNSON	15,538		19,091		3,552
01-06-2009	03-15-2013	868	FHLMC E96701 5%18 DUE 05/01/18	901	0	868		-33
02-19-2010	03-15-2013	559	5 000% Due 05-01-18 FHLMC E01479 3 5%18 DUE 09/01/18	571	0	559		-12
07-14-2009	03-15-2013	370	3 500% Due 09-01-18 FHLMC C90675 5%23 DUE 05/01/23	384	0	370		-14
08-30-2007	03-21-2013	300	5 000% Due 05-01-23 ARCH CAP GROUP LTD NEW F	7,069		15,518		8,448
04-17-2006	03-22-2013	300	NIKE INC CLASS B	6,126		17,848		11,721
03-17-2009	03-25-2013	364	FNMA PL 888889 4 5%18 DUE 12/01/18	376	0	364		-12
04-05-2012	04-10-2013	25,000	4 500% Due 12-01-18 BARCLAYS BK PLC 2%18F MED TRM NT DUE 04/10/18 MULTI STEP CPN	25,025	-4	25,000		-20
01-06-2009	04-15-2013	1,112	2 000% Due 04-10-18 FHLMC E96701 5%18 DUE 05/01/18	1,155	0	1,112		-43
02-19-2010	04-15-2013	662	5.000% Due 05-01-18 FHLMC E01479 3 5%18 DUE 09/01/18	677	0	662		-14
07-14-2009	04-15-2013	345	3 500% Due 09-01-18 FHLMC C90675 5%23 DUE 05/01/23	358	0	345		-13
11-18-2008	04-17-2013	1,000	5 000% Due 05-01-23 L-3 COMMUNICATIONS HLDGS	65,628		80,966		15,337
03-17-2009	04-25-2013	373	FNMA PL 888889 4 5%18 DUE 12/01/18	386	0	373		-12
01-06-2009	05-15-2013	975	4 500% Due 12-01-18 FHLMC E96701 5%18 DUE 05/01/18	1,012	0	975		-37
02-19-2010	05-15-2013	675	5 000% Due 05-01-18 FHLMC E01479 3 5%18 DUE 09/01/18	690	0	675		-14
07-14-2009	05-15-2013	393	3 500% Due 09-01-18 FHLMC C90675 5%23 DUE 05/01/23	408	0	393		-15
03-17-2009	05-25-2013	383	5.000% Due 05-01-23 FNMA PL 888889 4 5%18 DUE 12/01/18	396	0	383		-12
10-26-2012	06-15-2013	2,000 000	4 500% Due 12-01-18 ALLIANZ SE PFD 8.375% SUB	52,225		50,000	-2,225	

**PARAGON CAPITAL MANAGEMENT, LLC**

**REALIZED GAINS AND LOSSES  
GOLDBERG FAMILY FOUNDATION  
6100-3020**

**C/O LYNN G. INTRATER**  
*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
01-06-2009	06-15-2013	1,021	FHLMC E96701 5%18 DUE 05/01/18	1,061	0	1,021		-39
02-19-2010	06-15-2013	543	5 000% Due 05-01-18 FHLMC E01479 3 5%18 DUE 09/01/18	555	0	543		-11
07-14-2009	06-15-2013	318	3 500% Due 09-01-18 FHLMC C90675 5%23 DUE 05/01/23	331	0	318		-12
05-26-2010	06-17-2013	50,000	5 000% Due 05-01-23 GOLDMAN SACHS 3 4%13 NOTE DUE 06/15/13	50,000	0	50,000		0
03-17-2009	06-25-2013	371	3 400% Due 06-15-13 FNMA PL 888889 4 5%18 DUE 12/01/18	383	0	371		-12
01-06-2009	07-15-2013	632	4 500% Due 12-01-18 FHLMC E96701 5%18 DUE 05/01/18	656	0	632		-24
02-19-2010	07-15-2013	431	5 000% Due 05-01-18 FHLMC E01479 3 5%18 DUE 09/01/18	441	0	431		-9
07-14-2009	07-15-2013	293	3 500% Due 09-01-18 FHLMC C90675 5%23 DUE 05/01/23	305	0	293		-11
09-26-2005	07-24-2013	1,500	5 000% Due 05-01-23 ILLINOIS TOOL WORKS INC	59,373		107,068		47,694
03-17-2009	07-25-2013	331	4 500% Due 12-01-18 FNMA PL 888889 4 5%18 DUE 12/01/18	342	0	331		-11
09-01-2011	07-30-2013	25,000	4 500% Due 12-01-18 MORGAN STANLEY 4%20 NOTES DUE 07/30/20 MULTI STEP CPN	25,482	-90	25,000		-391
01-06-2009	08-15-2013	391	4 000% Due 07-30-20 FHLMC E96701 5%18 DUE 05/01/18	406	0	391		-15
07-14-2009	08-15-2013	308	5.000% Due 05-01-18 FHLMC C90675 5%23 DUE 05/01/23	319	0	308		-11
02-19-2010	08-15-2013	546	5 000% Due 05-01-23 FHLMC E01479 3.5%18 DUE 09/01/18	557	0	546		-11
03-17-2009	08-25-2013	311	3 500% Due 09-01-18 FNMA PL 888889 4 5%18 DUE 12/01/18	321	0	311		-10
01-06-2009	09-15-2013	834	4 500% Due 12-01-18 FHLMC E96701 5%18 DUE 05/01/18	866	0	834		-32
07-14-2009	09-15-2013	286	5 000% Due 05-01-18 FHLMC C90675 5%23 DUE 05/01/23	297	0	286		-11
02-19-2010	09-15-2013	396	5 000% Due 05-01-23 FHLMC E01479 3 5%18 DUE 09/01/18	404	0	396		-8
			3 500% Due 09-01-18					

ATTACHMENT B

**PARAGON CAPITAL MANAGEMENT, LLC**

**REALIZED GAINS AND LOSSES  
GOLDBERG FAMILY FOUNDATION  
6100-3020**

**C/O LYNN G. INTRATER**  
*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
08-28-2009	09-19-2013	300	PAYCHEX INC	8,504		12,295		3,790
03-17-2009	09-25-2013	300	FNMA PL 888889 4 5%18 DUE 12/01/18 4 500% Due 12-01-18	310	0	300		-10
01-06-2009	10-15-2013	521	FHLMC E96701 5%18 DUE 05/01/18 5 000% Due 05-01-18	541	0	521		-20
07-14-2009	10-15-2013	191	FHLMC C90675 5%23 DUE 05/01/23 5 000% Due 05-01-23	199	0	191		-7
02-19-2010	10-15-2013	493	FHLMC E01479 3 5%18 DUE 09/01/18 3 500% Due 09-01-18	504	0	493		-10
03-17-2009	10-25-2013	242	FNMA PL 888889 4 5%18 DUE 12/01/18 4 500% Due 12-01-18	250	0	242		-8
01-06-2009	11-15-2013	394	FHLMC E96701 5%18 DUE 05/01/18 5 000% Due 05-01-18	409	0	394		-15
07-14-2009	11-15-2013	158	FHLMC C90675 5%23 DUE 05/01/23 5 000% Due 05-01-23	164	0	158		-6
02-19-2010	11-15-2013	576	FHLMC E01479 3 5%18 DUE 09/01/18 3 500% Due 09-01-18	589	0	576		-12
03-17-2009	11-25-2013	239	FNMA PL 888889 4 5%18 DUE 12/01/18 4 500% Due 12-01-18	247	0	239		-8
10-15-2009	12-05-2013	200	JACOBS ENGINEERING GROUP	9,178		11,593		2,415
05-23-2007	12-05-2013	300	HARRIS CORPORATION	15,050		19,313		4,263
07-25-2013	12-05-2013	100	ACACIA RESH ACACIA TECH ACACIA TECHNOLOGIE	2,355		1,288	-1,067	
04-17-2006	12-05-2013	300	NIKE INC CLASS B	6,126		23,661		17,535
07-25-2013	12-05-2013	100	ACACIA RESH ACACIA TECH ACACIA TECHNOLOGIE	2,355		1,288	-1,067	
07-25-2013	12-05-2013	100	ACACIA RESH ACACIA TECH ACACIA TECHNOLOGIE	2,355		1,288	-1,067	
07-25-2013	12-05-2013	200	ACACIA RESH ACACIA TECH ACACIA TECHNOLOGIE	4,711		2,576	-2,135	
12-15-2006	12-05-2013	150	QUALCOMM INC	5,942		10,986		5,043
07-25-2013	12-05-2013	500	ACACIA RESH ACACIA TECH ACACIA TECHNOLOGIE	11,779		6,440	-5,338	
04-05-2012	12-05-2013	100	T J X COS INC	4,052		6,250		2,197
04-05-2012	12-05-2013	200	T J X COS INC	8,104		12,500		4,395
04-05-2012	12-05-2013	50	T J X COS INC	2,026		3,125		1,098
04-05-2012	12-05-2013	100	T J X COS INC	4,052		6,250		2,197
08-20-2012	12-05-2013	150	APACHE CORP	13,365		13,455		89

**PARAGON CAPITAL MANAGEMENT, LLC**

**REALIZED GAINS AND LOSSES  
GOLDBERG FAMILY FOUNDATION**

**6100-3020**

**C/O LYNN G. INTRATER**

*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
11-29-2006	12-05-2013	350	C V S HEALTH CORPORATION	9,962		23,155		13,193
01-25-2013	12-05-2013	800	MICROSOFT CORP	22,290		29,936	7,646	
05-25-2005	12-05-2013	250	FEDEX CORPORATION	22,132		34,560		12,427
12-26-2012	12-05-2013	700	WALGREEN COMPANY	25,619		39,626	14,006	
05-11-2012	12-05-2013	700	INTEL CORP	19,501		16,834		-2,666
03-13-2006	12-05-2013	100	TEVA PHARM INDS LTD ADRF SPONSORED ADR 1 A	4,174		3,985		-188
03-13-2006	12-05-2013	100	TEVA PHARM INDS LTD ADRF SPONSORED ADR 1 A	4,174		3,985		-188
03-13-2006	12-05-2013	100	TEVA PHARM INDS LTD ADRF SPONSORED ADR 1 A	4,174		3,985		-188
03-13-2006	12-05-2013	100	TEVA PHARM INDS LTD ADRF SPONSORED ADR 1 A	4,174		3,985		-188
01-06-2009	12-15-2013	650	FHLMC E96701 5%18 DUE 05/01/18 5 000% Due 05-01-18	676	0	650		-25
07-14-2009	12-15-2013	147	FHLMC C90675 5%23 DUE 05/01/23 5 000% Due 05-01-23	152	0	147		-5
02-19-2010	12-15-2013	278	FHLMC E01479 3 5%18 DUE 09/01/18 3 500% Due 09-01-18	284	0	278		-6
03-17-2009	12-25-2013	228	FNMA PL 888889 4 5%18 DUE 12/01/18 4 500% Due 12-01-18	236	0	228		-7
01-06-2009	12-31-2013	575	FHLMC E96701 5%18 DUE 05/01/18 5.000% Due 05-01-18	597	0	575		-22
07-14-2009	12-31-2013	185	FHLMC C90675 5%23 DUE 05/01/23 5 000% Due 05-01-23	192	0	185		-7
02-19-2010	12-31-2013	215	FHLMC E01479 3 5%18 DUE 09/01/18 3 500% Due 09-01-18	220	0	215		-4
03-17-2009	12-31-2013	226	FNMA PL 888889 4 5%18 DUE 12/01/18 4 500% Due 12-01-18	233	0	226		-7
TOTAL GAINS							21,653	225,490
TOTAL LOSSES							-12,902	-4,562
TOTAL REALIZED GAIN/LOSS							8,751	220,928
				229,679				
SHORT TERM				123,689		132,442	(8753)	
LONG TERM				566,105		186,937		(220,832)

ATTACHMENT B

**PARAGON CAPITAL MANAGEMENT, LLC**

**PORTFOLIO APPRAISAL  
GOLDBERG FAMILY FOUNDATION  
6100-3020  
C/O LYNN G. INTRATER  
December 31, 2013**

Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value	Pct. Assets	Unit Income	Annual Income	Cur. Yield
<b>COMMON STOCK</b>									
CONSUMER DISCRETIONARY									
600	COSTCO WHSL CORP NEW	31.42	18,857	119.02	71,412	2.7	1,420	852	1.1
700	MC DONALDS CORP	58.69	41,084	97.03	67,921	2.5	3,400	2,380	3.5
1,000	NIKE INC CLASS B	20.42	20,420	78.64	78,640	3.0	0,960	960	1.2
1,250	T J X COS INC	40.52	50,653	63.73	79,662	3.0	0,700	875	1.0
			131,015		297,635	11.3		5,067	1.7
CONSUMER STAPLES									
1,150	C V S HEALTH CORPORATION	28.46	32,732	71.57	82,305	3.1	1,100	1,265	1.5
2,000	COCA COLA COMPANY	26.41	52,839	41.31	82,620	3.1	1,220	2,440	2.9
1,000	PEPSICO INCORPORATED	54.71	54,717	82.94	82,940	3.1	2,620	2,620	3.1
1,300	WALGREEN COMPANY	36.59	47,579	57.44	74,672	2.8	1,350	1,755	2.3
			187,868		322,537	12.3		8,080	2.5
ENERGY									
850	APACHE CORP	49.13	41,768	85.94	73,049	2.7	1,000	850	1.1
600	CHEVRON CORPORATION	43.38	26,028	124.91	74,946	2.8	4,280	2,568	3.4
600	SCHLUMBERGER LTD F	100.19	60,118	90.11	54,066	2.0	1,600	960	1.7
2,000	TORTOISE ENERGY CAPITAL	24.14	48,296	32.65	65,300	2.4	1,720	3,440	5.2
			176,211		267,361	10.2		7,818	2.9
FINANCIALS									
1,200	ARCH CAP GROUP LTD NEW F	23.56	28,279	59.69	71,628	2.7	0,000	0	0.0
			28,279		71,628	2.7		0	0.0
HEALTH CARE									
850	JOHNSON & JOHNSON	62.15	52,831	91.59	77,851	2.9	2,800	2,380	3.0
2,000	TEVA PHARM INDS LTD ADRF SPONSORED ADR 1 A	37.82	75,642	40.08	80,160	3.0	1,159	2,318	2.8
			128,474		158,011	6.0		4,698	2.9
INDUSTRIALS									
550	FEDEX CORPORATION	57.91	31,853	143.77	79,073	3.0	0,800	440	0.5
1,300	JACOBS ENGINEERING GROUP	39.37	51,193	62.99	81,887	3.1	0,000	0	0.0
			83,046		160,960	6.1		440	0.2



**PARAGON CAPITAL MANAGEMENT, LLC**

**PORTFOLIO APPRAISAL  
GOLDBERG FAMILY FOUNDATION  
6100-3020  
C/O LYNN G. INTRATER  
December 31, 2013**

Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value	Pct. Assets	Unit Income	Annual Income	Cur. Yield
<b>SERVICES</b>									
2,200	DEVRY EDUCATION GROUP	30.27	66,611	35 50	78,100	2 9	0 340	748	0 9
			66,611		78,100	2 9		748	0 9
<b>TELECOMMUNICATION SERVICES</b>									
1,200	HARRIS CORPORATION	48 25	57,909	69 81	83,772	3 2	1 880	2,256	2 6
			57,909		83,772	3 2		2,256	2 6
<b>INFORMATION TECHNOLOGY</b>									
5,000	ACACIA RESH ACACIA TECH ACACIA TECHNOLOGIE	21.99	109,991	14 54	72,700	2 7	0 500	2,500	3 4
3,500	CISCO SYSTEMS INC	15 11	52,909	22 43	78,505	3 0	0 760	2,660	3 3
3,300	INTEL CORP	25 54	84,287	25 95	85,651	3 2	0 900	2,970	3 4
2,000	MICROSOFT CORP	27.86	55,726	37 41	74,820	2 8	1 240	2,480	3 3
1,700	PAYCHEX INC	28 34	48,189	45 53	77,401	2 9	1 520	2,584	3 3
1,050	QUALCOMM INC	39 61	41,598	74 25	77,962	2 9	1 680	1,764	2 2
			392,703		467,040	17 8		14,958	3 2
<b>COMMON STOCK Total</b>			1,252,121	①	1,907,046	② 72 9		44,065	2 3
<b>CORPORATE BONDS</b>									
25,000	MORGAN STANLEY FLT 2014 MED TRM NT DUE 04/13/14	100 01	25,025	100 08	25,021	0 9	2 000	500	1 9
50,000	2.000% Due 04-13-14 JPMORGAN CHASE 5 125%14 NOTES DUE 09/15/14	101 33	53,187	103 02	51,513	1 9	5 125	2,562	4 9
25,000	5.125% Due 09-15-14 ROYAL BANK SCOT 4 05%16F DUE 03/15/16 ROYAL BANK SCOTLAND	100 85	25,434	102 83	25,709	0 9	4 050	1,012	3 9
25,000	4 050% Due 03-15-16 ROYAL BANK SCOT 3 75%17F DUE 05/15/17 ROYAL BANK SCOTLAND	100 05	25,025	100 96	25,240	0 9	3 750	937	3 7
25,000	3 750% Due 05-15-17 MORGAN STANLEY VAR 17 DUE 09/30/17	105 49	26,517	103 91	25,979	0 9	5 500	1,375	5 2
25,000	5.500% Due 09-30-17 THE GOLDMAN SACHS 2 9%18 DUE 07/19/18	101 15	25,314	101 67	25,419	0 9	2 900	725	2 8
25,000	2 900% Due 07-19-18 PNC FUNDING CORP. 6.7%19 DUE 06/10/19 6 700% Due 06-10-19	120 14	30,461	120 81	30,204	1 1	6 700	1,675	5 5

**PARAGON CAPITAL MANAGEMENT, LLC**

**PORTFOLIO APPRAISAL  
GOLDBERG FAMILY FOUNDATION  
6100-3020**

**C/O LYNN G. INTRATER**

December 31, 2013

Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value	Pct. Assets	Unit Income	Annual Income	Cur. Yield
25,000	GENERAL ELECTRIC 4.375%20 DUE 09/16/20	106.68	26,168	107.96	26,991	1.0	4.375	1,093	4.0
25,000	4.375% Due 09-16-20 GENERAL ELECTRIC 3.65%20 DUE 11/15/20 3.650% Due 11-15-20	104.41	26,120	98.26	24,567	0.9	3.650	912	3.7
			264,451 (3)		260,645 (4)	9.9		10,793	4.1
<b>GNMA</b>									
200,000	FHLMC E96701 5%18 DUE 05/01/18	103.87	18,431	106.06	18,819	0.7	5.000	887	4.7
100,000	5.000% Due 05-01-18 FHLMC E01479	102.17	11,038	104.67	11,308	0.4	3.500	378	3.3
50,000	3.5%18 DUE 09/01/18 3.500% Due 09-01-18 FNMA PL 888889	103.34	7,118	106.65	7,346	0.2	4.500	309	4.2
100,000	4.5%18 DUE 12/01/18 4.500% Due 12-01-18 FHLMC C90675 5%23 DUE 05/01/23	103.87	6,962	108.75	7,289	0.2	5.000	335	4.5
	5.000% Due 05-01-23		43,551 (3)		44,763 (4)	1.7		1,910	4.2
<b>MUNICIPAL BONDS</b>									
25,000	ARKANSAS ST UNIV 3.35%15 EDUC PUB DUE 09/15/15 TAXBL	100.03	25,008	102.77	25,694	0.9	3.350	837	3.2
50,000	3.350% Due 09-15-15 KANSAS DEV FIN 4.812%16 GP DUE	106.39	53,207	105.64	52,824	2.0	4.812	2,406	4.5
25,000	05/01/16 XTRO TAXBL ASSURED GUARA 4.812% Due 05-01-16	107.74	26,941	104.94	26,235	1.0	4.160	1,040	3.9
25,000	4.16%18 EDUC FAC DUE 04/01/18 XTRO TAXBL	100.03	24,902	100.10	25,025	0.9	3.165	791	3.1
	4.160% Due 04-01-18 KY FIN ADMINIST 3.165%18 IMPT DUE 04/01/18 TAXBL		130,058 (3)		129,779 (4)	4.9		5,074	3.9
<b>PREFERRED STOCK</b>									
2,000,000	HSBC HOLDINGS PL 8% PFD PFD SERIES 2DUE 06	27.43	54,864	26.94	53,880	2.0	2.000	4,000	7.4
1,000,000	MORGAN STNLY T 6.6% PFD PFD DUE 02/01/46	25.47	25,474	24.55	24,550	0.9	1.650	1,650	6.7
500,000	PRINCIPAL FI 5.563% PFD PFD SER A	98.92	49,462	100.00	50,000	1.9	5.563	2,781	5.5

**PARAGON CAPITAL MANAGEMENT, LLC**

**PORTFOLIO APPRAISAL  
GOLDBERG FAMILY FOUNDATION  
6100-3020  
C/O LYNN G. INTRATER  
December 31, 2013**

Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value	Pct. Assets	Unit Income	Annual Income	Cur. Yield
1,000 000	PUBLIC STORAGE 5.2% PFD PFD DUE 01/16/99	24 99	24,991	18 85	18,850	0.7	1 300	1,300	6 8
			154,793 (1)		147,280 (2)	5 6		9,731	6 6
<b>CASH &amp; EQUIVALENTS</b>									
	SCHWAB ONE INTEREST		124,020		124,020	4 7	0 010	12	0 0
			124,020		124,020	4 7		12	0 0
<b>TOTAL PORTFOLIO</b>			1,965,007		2,613,535	100.0		71,588	2.7

Common Stock

(2) 1406,914.87

(2) 2,054,326

Fixed Income

(3) 438,060

(4) 435,187

# 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](http://www.irs.gov/form8868).

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- 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](http://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.	Employer identification number (EIN) or
	<b>GOLDBERG FAMILY FOUNDATION</b>	<b>43-6884613</b>
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	<b>C/O LYNN G INTRATER, 10412 METCALF</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	<b>OVERLAND PARK, KS 66212</b>	

Enter the Return code for the return that this application is for (file a separate application for each return) **0 4**

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

**LYNN G INTRATER**

- The books are in the care of ► **10406 METCALF - OVERLAND PARK, KS 66212**

Telephone No. ► **913-385-9996**

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

<b>3a</b> 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.	<b>3a</b>	\$	<b>5,370.</b>
<b>b</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.	<b>3b</b>	\$	<b>1,120.</b>
<b>c</b> <b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	<b>4,250.</b>

**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.	Employer identification number (EIN) or
	GOLDBERG FAMILY FOUNDATION	43-6884613
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	C/O LYNN G INTRATER, 10412 METCALF	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	OVERLAND PARK, KS 66212	

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.**

LYNN G INTRATER

- The books are in the care of **10406 METCALF - OVERLAND PARK, KS 66212**

Telephone No. **913-385-9996**

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.

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2014**

5 For calendar year **2013**, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

6 If the tax year entered in line 5 is for less than 12 months, check reason ☐ Initial return ☐ Final return

☐ Change in accounting period

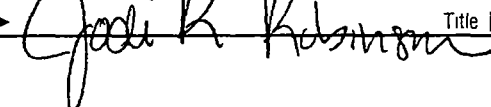
7 State in detail why you need the extension

**THE ACCOUNTING RECORDS ARE NOT COMPLETE ENOUGH TO FILE AN ACCURATE TAX RETURN AT THIS TIME.**

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	\$	5,370.
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	\$	5,370.
c <b>Balance due.</b> 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 \_\_\_\_\_

Date **AUG 14 2014**

Form 8868 (Rev. 1-2014)