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Form 990-PF

Return of Private Foundation

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

OMB No 1545-0052

Do not enter Social Security numbers on this form as it may be made public. Department of the Treasury Internal Revenue Service ▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf For calendar year 2013 or tax year beginning , and ending A Employer identification number Name of foundation BERGER FAMILY FOUNDATION 46-2425134 C/O STEVEN R. BERGER Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number (781) 749-9339659 MAIN STREET C If exemption application is pending, check here City or town, state or province, country, and ZIP or foreign postal code HINGHAM, MA 02043 G Check all that apply: Initial return Initial return of a former public charity D 1. Foreign organizations, check here Final return Amended return Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation H Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Uther taxable private foundation under section 507(b)(1)(A), check here X Cash 1 Fair market value of all assets at end of year J Accounting method: Accrual F If the foundation is in a 60-month termination ☐ Other (specify) under section 507(b)(1)(B), check here (from Part II, col. (c), line 16) (Part I, column (d) must be on cash basis) 0 ▶\$ (d) Disbursements for charitable purposes (cash basis only) Part | Analysis of Revenue and Expenses (c) Adjusted net (b) Net investment (a) Revenue and (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) expenses per books income income N/A Contributions, gifts, grants, etc., received Check X If the foundation is not required to attach Sch B Interest on savings and temporary cash investments 4 Dividends and interest from securities 5a Gross rents b Net rental income or (loss) 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 8a 0 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain 9 Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) 11 Other income 0 Ö. 12 Total. Add lines 1 through 11 0 0 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees STMT 1 975 975 **b** Accounting fees c Other professional fees 17 Interest 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative 975 975 0. expenses. Add lines 13 through 23 $\overline{0}$ 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 975. 975 0 Add lines 24 and 25 27 Subtract line 26 from line 12:

10-10-13 LHA For Paperwork Reduction Act Notice, see instructions.

8 Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

C Adjusted net income (if negative, enter -0-)

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-975

N/A

0.

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	_	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End o	of year
Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only		column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing			
		Savings and temporary cash investments			
		Accounts receivable			
		Less: allowance for doubtful accounts			
	4	Pledges receivable ▶		· · · · · · · · · · · · · · · · · · ·	,
		Less; allowance for doubtful accounts	v molecum norman and a contract	THE RESIDENCE OF THE PARTY OF T	
	5	Grants receivable			
		Receivables due from officers, directors, trustees, and other			
	-	disqualified persons			
	7	Other notes and loans receivable			3 & 3
		Less: allowance for doubtful accounts	***************************************		
S	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
As	_	Investments - U.S. and state government obligations			
		Investments - corporate stock			
		Investments - corporate bonds		<u> </u>	
	١	Investments - land, buildings, and equipment basis			
	''		androres of the second	v Pressonia most of non-a state of transcription	war no benefit on the second of the second o
	1,,	Less accumulated depreciation Investments - mortgage loans			
	13	Investments - other	·		
		Land, buildings, and equipment basis		<u> </u>	
	'"	Less accumulated depreciation	diameter amount a constituence or amountainer a	martilianen manne matellian 4 m	
	4.5	Other assets (describe)			
		Total assets (to be completed by all filers - see the	 -		
	10	·	0.	0.	0.
_	47	instructions. Also, see page 1, item 1)			
	17			<u></u>	* /
	18	Grants payable .			
Liabilities	19	Deferred revenue .		975.	
Ξ	20	Loans from officers, directors, trustees, and other disqualified persons		5,75.	4 , , ,
Lia	21	Mortgages and other notes payable			* * * * .
	22	Other liabilities (describe	-	ä.	*
		T . I P . I P	0.	975.	į
_	23		- 0.		'
		Foundations that follow SFAS 117, check here			
ģ		and complete lines 24 through 26 and lines 30 and 31.			** ** ***
JCe	24	Unrestricted .			-
a	25	Temporarily restricted			-
or Fund Balance	26	Permanently restricted			1 , ,
Š		Foundations that do not follow SFAS 117, check here			
F		and complete lines 27 through 31.		0.	
	27	Capital stock, trust principal, or current funds	0.	0.	<u>+</u>
SSe	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	-975	:
Net Assets	29	Retained earnings, accumulated income, endowment, or other funds	0.	-975. -975.	4 .
ž	30	Total net assets or fund balances	0.	-3/3	-
				0.	
_	31	Total liabilities and net assets/fund balances	0.		•
P	art	III Analysis of Changes in Net Assets or Fund E	Balances		
_			. 20	Т	
1		I net assets or fund balances at beginning of year - Part II, column (a), line	5 00		0.
_	•	st agree with end-of-year figure reported on prior year's return)		1 2	
		er amount from Part I, line 27a		. 2	
		er increases not included in line 2 (itemize)		3	ARE
		lines 1, 2, and 3		. 4	
		reases not included in line 2 (itemize)	.1 (1) 1 22		
6	Tota	il net assets or fund balances at end of year (line 4 minus line 5) - Part II, c	column (b), line 30	6	Form 990-PF (2013)
					FULIN 330-F F (2013)

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C/O STEVEN R. BERGER

		Sees for Tay on Ir		t Incomo					, 272.	7134 1	aye 3
<u> </u>		sses for Tax on Ir		t income	T7611	Tow ar	cauirea	n Date a	coursed T	(d) Data co	.ld
(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.)				1,4,	(b) How acquired (P - Purchase D - Donation		c) Date a) mo., da)	y, yr.)	(d) Date so (mo., day, y		
	archouse,		J. INICO 00.7		۳	- Don	ation	•	+		
b NC	NE				┼						
C NO	1111				+						
_ d		_	 	<u></u>	+						
- c					+				-		
(e) Gross sales price	(f) l	Depreciation allowed (or allowable)		st or other basis expense of sale				(h) Ga (e) plus	ın or (loss) (f) mınus (g)	
a	<u> </u>				\neg						
<u>b</u>	<u>† </u>										
C				- · · · -							
d											
e											
Complete only for assets show	ng gain in	column (h) and owned by	the foundation	on 12/31/69	\Box		(I)	Gains (Co	ol. (h) gain i	minus	
(i) F.M.V. as of 12/31/69		(i) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any			COI.	Losses (ot less than from col. (I	1-0-) or 1))	
a											
b	<u> </u>							_	_		
_c	<u> </u>										
_d	1										
<u>e</u>	<u> </u>		<u> </u>				r				
2 Capital gain net income or (net c	apıtal loss)) If gain, also enter If (loss), enter -0	r in Part I, line I- in Part I, line	7 7	}	2					
3 Net short-term capital gain or (lo If gain, also enter in Part I, line 8	, column (nd (6):		}						
If (loss), enter -0- in Part I, line 8	ladas C	Section 4940(e) for	Doduosa	Toy on No	<u></u>	3	nont Inc				
						_	Hent Inc	Jille	_		
(For optional use by domestic private	te foundati	ons subject to the section	4940(a) tax on	net investment i	ncome	e.)					
If section 4940(d)(2) applies, leave	this part bl	ank.									
Was the foundation liable for the sec	ntion 4042	tay on the dictributable an	nount of any w	oar in the bace no	riod?					Yes X	Z No
If "Yes," the foundation does not qua				•	iiou.					103 4	<u></u> 140
1 Enter the appropriate amount in	each colu	mn for each year: see the i	nstructions be	fore making any	entries	S.		-			
	1	(b)			(c)		-	1	Dieterk	(d) ution ratio	
(a) Base period years Calendar year (or tax year beginn	ına ın)	Adjusted qualifying dis	stributions	Net value of n			-use assets	1 (col. (b) div	ution ratio ided by col. (c))
2012	,		0.				0	•		.000	000
2011		 -									
2010											
2009									-		
2008		<u>.</u>						<u> </u>			
								l í			
2 Total of line 1, column (d)								2		.000	1000
3 Average distribution ratio for the	-	•	on line 2 by 5,	or by the numbe	r of ye	ears				000	
the foundation has been in exist	ence if less	s than 5 years						3		.000	1000
4 Enter the net value of noncharita	ble-use as	sets for 2013 from Part X.	line 5					4			
· Lines and net value of the north and											
5 Multiply line 4 by line 3								5			0.
		•									
6 Enter 1% of net investment inco	me (1% of	Part I, line 27b)						6			0.
	-										
7 Add lines 5 and 6								7			0.
0.00	D- / \/''	han 4									975.
8 Enter qualifying distributions fro If line 8 is equal to or greater tha		-	th and come	nlate that nart ven	na a 1	% tav	rate	8	_		. , , , .
See the Part VI instructions.		noon the box in Fait VI, line	, 10, and 60111	pioto tilat part usii	yaı	70 tux					

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8b

9

N/A

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)

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV

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

of each state as required by General Instruction G? If "No," attach explanation

Pa	art VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
	section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
_	If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► N/A			
14	The books are in care of ► STEVEN R. BERGER, TRUSTEE Telephone no. ► 781-74	9-9	339	
17	Located at ▶ 659 MAIN STREET, HINGHAM, MA ZIP+4 ▶02			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		_	\Box
13	and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
10		1 16		X
	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			
Da	country ► art VII-B Statements Regarding Activities for Which Form 4720 May Be Required	Щ.		41
Pe		т—	Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	\vdash	162	NO
1a	a During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			1
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	ì		,
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			,
	(5) Transfer any income or assets to a disqualified person (or make any of either available			,
	for the benefit or use of a disqualified person)?	,	٠٠	
	(6) Agree to pay money or property to a government official? (Exception. Check "No"			
	ıf 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.)		4 15	
t	b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations		, <u>,</u>	
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here			
(Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected	9	\$ <	×
	before the first day of the tax year beginning in 2013?	10		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	F		
	defined in section $4942(j)(3)$ or $4942(j)(5)$):		· 🔅 💸	
á	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 X No	İ		
	If "Yes," list the years > , , , , , ,			ا م
t	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.) N/A	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.			×
	•			,
32	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			;
	during the year?			
1	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			1
•	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) N/A	3b		
A	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	 	x
	b Did the foundation invest during the year any amount in a mariner that would jeopardize its charitable purposes. 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
		rm 99 0	N-DE	
	FC	IIII 331	9-FF	(2013)

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Part VII-B Statements Regarding Activities for Which F	Form 4720 May Be F	Required (continu	ued)	
5a During the year did the foundation pay or incur any amount to:	<u>-</u>			- Commen
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1 4945(e))?	Ye	s X No	,
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indire	ectly,		~ 1
any voter registration drive?		Y6	s X No	
(3) Provide a grant to an individual for travel, study, or other similar purposes'	7		s X No	
(4) Provide a grant to an organization other than a charitable, etc., organization			S A NO	
509(a)(1), (2), or (3), or section 4940(d)(2)?			s X No	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f	or		***
the prevention of cruelty to children or animals?	o. 000000000000000000000000000000000000		s X No	* \$ ~ ;
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify unc	er the excentions described i			
section 53.4945 or in a current notice regarding disaster assistance (see instru	-	n rogalatione	N/A	5b
Organizations relying on a current notice regarding disaster assistance check h		-		
c if the answer is "Yes" to question 5a(4), does the foundation claim exemption fr		ined		₩ 1 ~ ~ « «
expenditure responsibility for the grant?		//A	ıs No	
If "Yes," attach the statement required by Regulations section 53.494	•	1/22	.3	
	• •			}
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on		s X No	
a personal benefit contract?				6b X
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonai benenii comraci?		<u> </u>	* * * * * * * * * * * * * * * * * * *
If "Yes" to 6b, file Form 8870	lt t	□ v.	es X No	
7a At any time during the tax year, was the foundation a party to a prohibited tax s		Ye		7b
b If "Yes," did the foundation receive any proceeds or have any net income attribu				/B
Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors	ees, Foundation Ma	ınagers, Hıgnı	y	
				
1 List all officers, directors, trustees, foundation managers and their		(c) Compensation	(d) Contributions to	(e) Expense
(a) Name and address	(b) Title, and average hours per week devoted	(If not paid,	(d) Contributions to employee benefit plans and deferred	account, other
	to position	enter-0-)	compensation	allowances
STEVEN R. BERGER	TRUSTEE			
659 MAIN STREET			ا م	,
HINGHAM, MA 02043	0.00	0.	0.	0.
PATRICIA W. BERGER	TRUSTEE			
659 MAIN STREET	2 22			
HINGHAM, MA 02043	0.00	0.	0.	0.
		<u> </u>		
		1		
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	T (31)	
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) Expense account, other
(a) Name and address of each employee para more than \$60,000	devoted to position	(c) compensation	compensation	allowances
NONE				
		l		
]			
	1			
	·			
	1		1	
			 	
	1			
Total number of other employees paid over \$50,000	·		<u> </u>	0
TOTAL TERMS OF OTHER PROPERTY OF THE POST			Form	990-PF (2013)

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C/O STEVEN R. BERGER

Information About Officers, Directors, Trustees, Foundation Managers, Highly Part VIII Paid Employees, and Contractors (continued) 3 Five highest-paid independent contractors for professional services. If none, enter "NONE." (b) Type of service (a) Name and address of each person paid more than \$50,000 (c) Compensation NONE Total number of others receiving over \$50,000 for professional services Part IX-A | Summary of Direct Charitable Activities List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the **Expenses** number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. 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 N/A All other program-related investments. See instructions.

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Total. Add lines 1 through 3

46-2425134 Page 8 C/O STEVEN R. BERGER Form 990-PF (2013) Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 0. 1a a Average monthly fair market value of securities 1b b Average of monthly cash balances 1c c Fair market value of all other assets 0. 1d d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 0. 2 Acquisition indebtedness applicable to line 1 assets 2 3 Subtract line 2 from line 1d Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 0. 5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 О. Minimum investment return. Enter 5% of line 5 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.) $\overline{0}$. Minimum investment return from Part X, line 6 2a 2a Tax on investment income for 2013 from Part VI, line 5 Income tax for 2013. (This does not include the tax from Part VI.) 2b 2c c Add lines 2a and 2b 3 Distributable amount before adjustments. Subtract line 2c from line 1 4 Recoveries of amounts treated as qualifying distributions 5 5 Add lines 3 and 4 6 Deduction from distributable amount (see instructions) Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 975. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a 1b b Program-related investments - total from Part IX-B 2 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 3 Amounts set aside for specific charitable projects that satisfy the: 3a a Suitability test (prior IRS approval required) 3b Cash distribution test (attach the required schedule) 975. 4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

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

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5

income. Enter 1% of Part I, line 27b

6 Adjusted qualifying distributions. Subtract line 5 from line 4

4940(e) reduction of tax in those years.

Form 990-RF (2013)

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,				0
line 7				0.
2 Undistributed income, if any, as of the end of 2013			0.	,
a Enter amount for 2012 only			0.	
b Total for prior years:		^		
,		0.		
3 Excess distributions carryover, if any, to 2013:			*	; " ?
a From 2008				
b From 2009	V			» · · · · · · · · · · · · · · · · · · ·
c From 2010				•
dFrom 2011	•		4	
e From 2012			*	
f Total of lines 3a through e	0.			\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\
4 Qualifying distributions for 2013 from Part XII, line 4: ►\$ 975.	\$	ŕ	, ,	**
			0.	
a Applied to 2012, but not more than line 2a	*	, , , , , , , , , , , , , , , , , , ,	<u> </u>	* * *
b Applied to undistributed income of prior		0.		
years (Election required - see instructions)	·		у	
c Treated as distributions out of corpus	٨			,
(Election required - see instructions)	0.	,	· · ·	0.
d Applied to 2013 distributable amount	075		<u></u>	<u> </u>
e Remaining amount distributed out of corpus	975.	* * *	PS	0.
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			, ,
6 Enter the net total of each column as indicated below:		* 3	₹ <i>\$</i> *	3. ⊁
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	975.			> x
b Prior years' undistributed income. Subtract				
line 4b from line 2b	* .	0.	w.s	<
c Enter the amount of prior years'				
undistributed income for which a notice of	. \$			5 5 7
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	77.			*
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	0.			
9 Excess distributions carryover to 2014.				
Subtract lines 7 and 8 from line 6a	975.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
dExcess from 2012				
e Excess from 2013 975.	L			Form 990-DF (2012)

Part XIV Private Operating Fo	VEN K. BERG		II A guartian (I)	N/A	23134 rage 10
				N/A	
1 a If the foundation has received a ruling or					
foundation, and the ruling is effective for	•			4942(j)(3) or 4	942(1)(5)
b Check box to indicate whether the found		T T T T T T T T T T T T T T T T T T T	Prior 3 years] 4342(J)(3) 01 L 4	T
2 a Enter the lesser of the adjusted net	Tax year (a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
income from Part I or the minimum	(2) 20 10	(0)2012	(6) 23 **	 	
investment return from Part X for					
each year listed b 85% of line 2a	_	<u> </u>			
+			 	-	
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)				<u> </u>	
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income Part XV Supplementary Info	metion (Compl	oto this part only	if the foundation	n had \$5,000 or m	ore in accets
Part XV Supplementary Info			n the foundatio N/A		iore iii assets
1 Information Regarding Foundatio			14/11	<u> </u>	
a List any managers of the foundation who	•	e than 2% of the total co	ntributions received by th	e foundation before the cl	ose of any tax
year (but only if they have contributed m			ta locations received by the	o loundation boloro allo ol	500 0. u.i.y u.i.
b List any managers of the foundation who	o own 10% or more of t	the stock of a corporation	ı (or an equally large por	tion of the ownership of a	partnership or
other entity) of which the foundation has				·	•
2 Information Regarding Contributi	on, Grant, Gift, Loai	n, Scholarship, etc., l	Programs:	<u> </u>	
Check here 🕨 🔲 if the foundation o					
the foundation makes gifts, grants, etc. ((see instructions) to ind	lividuals or organizations	under other conditions,	complete items 2a, b, c, ar	ıd d.
a The name, address, and telephone numb	oer or e-mail address of	f the person to whom ap	olications should be addr	essed:	
b The form in which applications should b	e submitted and inform	ation and materials they	should include:		
		and materials trey	onsaid molddo.		
c Any submission deadlines:					
d Any restrictions or limitations on awards	s, such as by geographi	cal areas, charitable field	s, kınds of ınstitutions, o	r other factors;	
-	•				

Part XV Supplementary Information				
3 Grants and Contributions Paid During the Ye	ar 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)	or substantial contributor	recipient		
a Paid during the year				
NONE				
NONE				
		1		
			:	
		ļ		
Total	<u> </u>	<u> </u>	▶ 3a	0.
b Approved for future payment		T		
NONE				
		 		
Total	· · · · · · · · · · · · · · · · · · ·		. > 3b	0.

Form 990-RF (2013)

Part Avi-A Analysis of Income-Producing Activitie	Part XVI-A	Analysis of Income-Producing Ac	tivities
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nter gross amounts unless otherwise indicated.	Unrelate	d business income		ded by section 512, 513, or 514	(e)
grand grand and annual control in all and an	(a) Business	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue:	Business	Amount	sion	Amount	function income
a	5500		1		
h			+		
	-		+-		
<u> </u>	_		┼		
d	_		┼		
e	_	·	┼─	<u> </u>	
· -	_		 		<u> </u>
g Fees and contracts from government agencies	<u> </u>		├ ─		
2 Membership dues and assessments	<u> </u>		<u> </u>		
3 Interest on savings and temporary cash					
investments			↓		
4 Dividends and interest from securities			<u> </u>		
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other			1		
than inventory					
9 Net income or (loss) from special events					
O Gross profit or (loss) from sales of inventory		11	 		
1 Other revenue:	-		+-		
<u></u>			+		-
			┼	-	
C			+		
	1 1				
d	_		-		
d e	_				
e2 Subtotal. Add columns (b), (d), and (e)	_	0 .	•	0.	0
d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e)		0.		0 ·	0
e2 Subtotal. Add columns (b), (d), and (e))	0 .	•	<u> </u>	0
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C/O STEVEN R. BERGER

Exempt Organizations Doth terrograms intended or indicative yeagues 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?	Part XVII	Information Re	egarding Tran		nd Transactions	and Relationsh	nips With Non	ncharitable		90 10
the Code (other than section 501(x)3) organizations) or in section 527, relating to political organizations? a Transfers from the reporting foundation to a noncharitable exempt organization of. (1) Cosh CP) Other sassets CP) Other sassets CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of assets from a noncharitable exempt organization CP) Purchase of a noncharitable exempt organization CP) Purchase of a noncharitable exempt organization CP) Description of relationship or noncharitable exempt organization CP) Description of relationship Purchase of organization CP) Description of relationship N/A Purchase of organization CP) Description of relationship N/A Purchase of organization CP) Description of relationship N/A Purchase of organization CP) Description of relationship Purchase of organization	·									
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(6) Performance of services or membership or fundraising solicitations 2. Sharing of facilities, equipment, making lists, other assets, or paid employees 3. 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. (a) Line no (b) Amount involved (c) Name of noncharidable exempt organization (d) Description of varieties, transactions, and sharing arrangements 2. 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? 3. If Yes, complete the following schedule. (a) Name of organization (b) Type of organization (e) Description of relationship N/A (a) Name of organization (b) Type of organization (e) Description of relationship N/A (b) Type of organization (e) Description of relationship N/A (c) Under penalties of perpury, 1 offerir tipe! I have sparring of this relation of prepare (other than tax-payor) is based on all information of which prepare has any knowledge plant the prepare of the penalties of the penalties of perpury, 1 offerir tipe! I have sparring in based on all information of which prepare has any knowledge plant the prepare of the penalties of perpury. I offerir tipe! Print gives in the prepare of the penalties of penalties (b) the			• •	-		•		1b(5)		X
C Sharing of facilities, equipment, making lists, other assets, or paid employees 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 received. (a) Line no (b) Amount involved (c) Name of noncharriable exempt organization (d) Description of transfers, transactions, and sharing arrangements. Show in column (d) the value of the goods, other assets, or services received. (a) Line no (b) Amount involved (c) Name of noncharriable exempt organization (d) Description of transfers, transactions, and sharing arrangements. N/A 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? No If Yes, complete the following schedule. (a) Name of organization (b) Type of organization (c) Description of relationship N/A One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other than section 501(c)(3)) or in section 527? One of the code (other			mbership or fundrai	sına solicitatio	ns		·			X
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Form **990-PF** (2013)

FORM 990-PF	ACCOUNTI	NG FEES	STATEMENT 1			
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
ACCOUNTING FEES	975.	0.		975.		
TO FORM 990-PF, PG 1, LN 16B	975.	0.		975.		