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.

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning , 2013, and ending , 20

Name of foundation: THE TODD AND BETIANA SIMON FOUNDATION

A Employer identification number: 47 0820673

Number and street (or P O box number if mail is not delivered to street address) | Room/suite: 11030 O STREET

B Telephone number (see instructions): 402 597 8115

City or town, state or province, country, and ZIP or foreign postal code: OMAHA, NE 68137-2346

C If exemption application is pending, check here ▶ ☐

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

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

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 2963376

J Accounting method: ☑ Cash ☐ Accrual ☐ Other (specify) *(Part I, column (d) must be on cash basis.)*

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

Part I	**Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)*	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue 1	Contributions, gifts, grants, etc., received (attach schedule)	6000			
2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
3	Interest on savings and temporary cash investments	858	858		
4	Dividends and interest from securities	88569	88569		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	110184			
b	Gross sales price for all assets on line 6a 681215				
7	Capital gain net income (from Part IV, line 2)		110184		
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) (attach schedule)				
11	Other income (attach schedule)				
12	**Total.** Add lines 1 through 11	205611	199611	N/A	
Operating and Administrative Expenses 13	Compensation of officers, directors, trustees, etc.				
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)				
c	Other professional fees (attach schedule)	19038	19038		
17	Interest				
18	Taxes (attach schedule) (see instructions)	4187	2194		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule)	246	246		
24	**Total operating and administrative expenses.** Add lines 13 through 23	23471	21478		
25	Contributions, gifts, grants paid	644629			644629
26	**Total expenses and disbursements.** Add lines 24 and 25	668100	21478		644629
27	Subtract line 26 from line 12:				
a	**Excess of revenue over expenses and disbursements**	-462489			
b	**Net investment income** (if negative, enter -0-)		178133		
c	**Adjusted net income** (if negative, enter -0-)			N/A	

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Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	340013	68915	68915
	3	Accounts receivable ▶ 4396			
		Less: allowance for doubtful accounts ▶	8065	4396	4396
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	2490472	2302750	2890065
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment. basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment: basis ▶			
		Less· accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	2838550	2376061	2963376
Liabilities	17	Accounts payable and accrued expenses		2	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0	2	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	100	100	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	2838450	2375959	
	30	**Total net assets or fund balances** (see instructions)	2838550	2376059	
	31	**Total liabilities and net assets/fund balances** (see instructions)	2838550	2376061	

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	2838550
2	Enter amount from Part I, line 27a	2	-462489
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	2376061
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2376061

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	PUBLICLY TRADED SECURITIES			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	681215		571031	110184
b				
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 } 2 110184

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 . . . 3

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

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

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

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

1 Enter the appropriate amount in each column for each year; see 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	543770	2986483	.182077
2011	763314	3067265	.248858
2010	414542	2561461	.161838
2009	322611	2349487	.137311
2008	265290	2488444	.106609

2	**Total** of line 1, column (d)	2	.836693
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.167339
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	2993331
5	Multiply line 4 by line 3	5	500901
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1781
7	Add lines 5 and 6	7	502682
8	Enter qualifying distributions from Part XII, line 4	8	644629

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 ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ________ (attach copy of letter if necessary—see instructions)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	1781
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	1781
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	1781
6	Credits/Payments:				
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2500		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c			
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments. Add lines 6a through 6d			7	2500
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	719
11	Enter the amount of line 10 to be: **Credited to 2014 estimated tax** ▶ 719 **Refunded** ▶			11	

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?	1a		✓
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		✓
	*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.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		✓
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ________ **(2)** On foundation managers. ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		✓
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*	3		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		✓
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	✓	
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*	7	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NEBRASKA			
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*	8b	✓	
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*	9		✓
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		✓

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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		✓
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		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	

Website address ▶

14 The books are in care of ▶ TODD D SIMON Telephone no. ▶ 402 597 8115
Located at ▶ 11030 O STREET, OMAHA, NE ZIP+4 ▶ 68137-2346

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041**—Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

			Yes	No
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		✓
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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

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

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

			Yes	No
5a	During the year did the foundation pay or incur any amount to:			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	**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? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945-5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		✓
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
TODD D SIMON 9800 HARNEY PARKWAY S, OMAHA, NE 68114	PRES & TREAS < 5	-0-	-0-	-0-
BARBARA GOLDSTEIN 1349 S 101ST ST., OMAHA, NE	SECR < 1	-0-	-0-	-0-
JOANNA FRENCH 926 KINGSTON AVE., PIEDMONT, CA 94611	VICE PRES < 1	-0-	-0-	-0-

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

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

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services . . . . ▶		NONE

Part IX-A Summary of Direct Charitable Activities

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

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
a	Average monthly fair market value of securities	1a	2839823
b	Average of monthly cash balances	1b	199092
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	3038915
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) . . . 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	3038915
4	Cash deemed held for charitable activities. Enter 1 ½ % of line 3 (for greater amount, see instructions)	4	45584
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2993331
6	**Minimum investment return.** Enter 5% of line 5	6	149667

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6			1	149667
2a	Tax on investment income for 2013 from Part VI, line 5	2a	1781		
b	Income tax for 2013. (This does not include the tax from Part VI)	2b	0		
c	Add lines 2a and 2b			2c	1781
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	147886
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	147886
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	147886

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	644629
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	644629
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	1781
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	642848

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

			(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1	Distributable amount for 2013 from Part XI, line 7					147886
2	Undistributed income, if any, as of the end of 2013:					
a	Enter amount for 2012 only				0	
b	Total for prior years: 20___,20___,20___			0		
3	Excess distributions carryover, if any, to 2013.					
a	From 2008	141545				
b	From 2009	205579				
c	From 2010	288445				
d	From 2011	611807				
e	From 2012	397432				
f	**Total** of lines 3a through e		1644808			
4	Qualifying distributions for 2013 from Part XII, line 4: ▶ $ 644629					
a	Applied to 2012, but not more than line 2a				0	
b	Applied to undistributed income of prior years (Election required—see instructions)			0		
c	Treated as distributions out of corpus (Election required—see instructions)		0			
d	Applied to 2013 distributable amount					147886
e	Remaining amount distributed out of corpus		496743			
5	Excess distributions carryover applied to 2013 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		0			0
6	**Enter the net total of each column as indicated below:**					
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5		2141551			
b	Prior years' undistributed income. Subtract line 4b from line 2b			0		
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed			0		
d	Subtract line 6c from line 6b. Taxable amount—see instructions			0		
e	Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount—see instructions				0	
f	Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014					0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)		0			
8	Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)		141545			
9	**Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a		2000006			
10	Analysis of line 9:					
a	Excess from 2009	205579				
b	Excess from 2010	288445				
c	Excess from 2011	611807				
d	Excess from 2012	397432				
e	Excess from 2013	496743				

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter: **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter ⅔ of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter: **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE SCHEDULE ATTACHED				644629
Total . . . . ▶ 3a				644629
b *Approved for future payment*				
NONE				
Total . . . . ▶ 3b				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue.					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	858	
4 Dividends and interest from securities			14	88569	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	110184	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				199611	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 199611

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
	N/A

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

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 | 4-23-14 Date | ▶ PRESIDENT Title

May the IRS discuss this return with the preparer shown below (see instructions)? ☐ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN

Firm's name ▶ | Firm's EIN ▶

Firm's address ▶ | Phone no

THE TODD AND BETIANA SIMON FOUNDATION E.I.N. 47-0820673
FOR THE YEAR ENDED 12/31/13
SCHEDULE OF INFORMATION FOR FORM 990-PF

PART I, LINE 16c, OTHER PROFESSIONAL FEES:

Credit Suisse	Investment management fee	$19,038
	Total	$19,038

PART I, LINE 18, TAX EXPENSE:

2012 Form 990-PF	balance due	$493
2013 Form 990-PF	estimated tax payment	$1,500
Credit Suisse	foreign tax on dividends	$2,194
	Total	$4,187

PART I, LINE 23, OTHER EXPENSES:

Credit Suisse	ADR fees on foreign dividends	$246
	Total	$246

THE TODD AND BETIANA SIMON FOUNDATION E.I.N. 47-0820673
FOR THE YEAR ENDED 12/31/13
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PART II, LINE 10b, INVESTMENTS - SECURITIES

Corporate Name	No of Shares	Book Value	Fair market value
CALAMOS CONVERTIBLE FD CL C	2302.883	41,070.30	40,922 23
DOUBLELINE TOTAL RETURN BOND FD	23323 610	261,298.23	251,428.52
ISHARES TR MSCI EAFE INDEX FD	3103.221	168,042 29	208,210.59
LORD ABBETT FLOATING RATE CL C	19010.808	176,025 12	180,792.78
LORD ABBETT INFLATION FOCUSED FD	12738.073	186,823.67	180,371.11
NEW WORLD FD CL A	1204.934	54,608.79	70,789 87
OPPENHEIMER SR FLT RT FD CL A	6856.187	56,974.91	57,797.66
OPPENHEIMER SR FLT RT FD CL C	52.507	436.22	443.16
PIMCO TOTAL RETURN FUND	8921.124	99,096.92	95,366.82
SPDR S&P 500 ETF TR	1384 757	150,220.06	255,750.81
TEMPLETON GLOBAL BOND FD CL C	14020.935	184,254.31	184,515.51
VANGUARD REIT INDEX FD	4578.456	60,096 64	98,299.45
ABBOTT LABS	226	5,883.82	8,662.58
ABBVIE INC	180	4,718.47	9,505 80
ACCENTURE PLC IRELAND CL	145	10,547.23	11,921.90
BAXTER INTL INC	227	11,791.43	15,787 85
BLACKROCK INC	25	4,130.91	7,911.75
CHEVRON CORP	115	8,776.51	14,364.65
COCA-COLA CO	215	8,481 64	8,881.65
ENSCO PLC	270	13,083.96	15,438.60
GENERAL MILLS	260	9,900.32	12,976.60
INTEL CORP	520	10,371.98	13,496 60
KINDER MORGAN INC	428	16,411.50	15,408 00
MAXIM INTEGRATED PRODUCTS	360	10,689.81	10,044.00
MCDONALDS CORP	140	8,966.30	13,584.20
METLIFE INC	299	10,409.60	16,122.08
MICROSOFT CORP	225	5,560.17	8,417.25
NOVARTIS AG SPONS ADR	202	10,771 32	16,236.76
OCCIDENTAL PETE CORP	158	13,487.42	15,025.80
OMNICOM GROUP INC	150	5,308 82	11,155.50
PEARSON PLC SPONS ADR	545	7,645.04	12,208.00
PEPSICO INC	168	10,355 98	13,933.92
PFIZER INC	486	8,302.66	14,886 18
PHILIP MORRIS INTL	101	5,868.56	8,800.13
QUALCOMM INC	256	15,853 18	19,008 00
ROGERS COMMUNICATIONS CL B	315	12,521.84	14,253 75
SPECTRA ENERGY CORP	468	12,774.38	16,670.16
TARGET CORP	223	11,956.73	14,109.21
TIME WARNER CABLE INC	78	6,764.50	10,569.00
TRAVELERS COS	155	8,776.82	14,033.70
UNILEVER PLC	348	11,094.76	14,337.60
UNITED PARCEL SERVICE	124	8,840.51	13,029.92
WELLPOINT INC	125	7,746.93	11,548.75
ABB LTD SPONS ADR	325	6,534 92	8,632.00
ALSTOM ADR	2225	8,095.21	8,116.80
ASTRAZENECA PLC SPONS ADR	40	1,799 56	2,374 80
BAE SYS PLC	320	6,651 06	9,222.08
BAYER AG	90	6,460.84	12,643.29
BHP BILLITON LTD SPONS ADR	65	4,728.27	4,433.00
BOC HONG KONG HLDGS SPONS ADR	90	4,152 06	5,768 82
BRITISH AMERN TOB PLC	120	7,677.49	12,890.40
CANADIAN OIL SANDS LTD	245	6,884.94	4,608.02
DEUTSCHE TELEKOM AG	735	10,032.07	12,589.08
DEUTSCHE POST AG	310	5,886.71	11,319.96
GDF SUEZ	345	9,232.35	8,126.82
GLAXOSMITHKLINE PLC	195	8,910.62	10,411.05
HSBC HLDGS PLC	180	9,880.75	9,923.40

THE TODD AND BETIANA SIMON FOUNDATION E.I.N. 47-0820673
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IMPERIAL TOBACCO GROUP PLC	85	6,020 94	6,583 00
KIRIN HLDGS CO LTD	505	7,941.13	7,269.48
MANULIFE FINL CORP	500	7,755.18	9,865.00
MTN GROUP LTD	420	8,593.84	8,702 40
MUNICH RE GROUP	450	6,722.16	9,930.60
NESTLE SA	150	6,996.00	11,013.60
NIPPON TELEG & TELEPHONE CORP	385	10,358.18	10,410.40
NOVARTIS AG	140	7,293.65	11,253.20
LUKOIL CO SPOND ADR	150	9,943.56	9,310.80
PERUSAHAAN PERSEROAN PERSERO	125	4,226.02	4,481.25
RECKITT BENCKISER PLC	470	5,086.21	7,462.19
RIOCAN REAL ESTATE INVESTMENT TR	135	2,726.07	3,147.84
ROCHE HLDGS LTD SPONS ADR	170	6,035.10	11,908.67
ROYAL DUTCH SHELL	70	4,462.72	5,257.70
SANOFI SPONS ADR	190	6,697.69	10,189.70
SIEMENS A G SPONS ADR	60	5,217.27	8,310.60
SINGAPORE TELECOMMUNICATIONS	215	5,227.23	6,232 42
SMITHS GROUP PLC	435	6,822.64	10,663.16
STATOIL ASA	185	4,679.25	4,464.05
TAIWAN SEMICONDUCTOR MFG	135	1,278.35	2,354.40
TESCO PLC SPON ADR	180	3,557.10	2,990.34
TOTAL S A	175	9,720.00	10,722.25
UNILEVER NV NEW YORK	280	8,648.98	11,264.40
UNITED OVERSEAS BK	195	4,767.75	6,560.78
VODAFONE GROUP PLC	280	6,218.58	11,006.80
ZURICH FINL SVCS	295	5,468.75	8,574.47
ADVENT SOFTWARE	349	4,753.14	12,198 25
ALBEMARLE CORP	374	17,493.25	23,707.86
ALEXANDER & BALDWIN INC	327	4,831.38	13,645.71
ALLIANT TECHSYSTEMS INC	120	11,023.86	14,601.60
AMERICAN EAGLE OUTFITTERS	428	5,599.88	6,163.20
ATWOOD OCEANICS	394	13,518.07	21,035.66
CABELAS INC	462	5,731.57	30,796.92
COLUMBIA SPORTSWEAR	161	8,307.17	12,678.75
CORRECTIONS CORP AMER	582	15,305.54	18,664.74
DECKERS OUTDOOR CORP	236	14,095.98	19,932 56
EATON VANCE CORP	624	16,242.54	26,700.96
FIRST INDL RLTY TR INC	987	11,674.01	17,223 15
KAMAN CORP CL A	200	6,177.45	7,946.00
MBIA INC	1055	8,777 87	12,596 70
MRC GLOBAL INC	586	18,718.54	18,904.36
MARTIN MARIETTA MATLS INC	76	6,608 31	7,595.44
MATSON INC	379	7,965.31	9,895.69
MICREL INC	509	5,129.66	5,023.83
MONTPELIER RE HOLDINGS LTD	407	6,450 29	11,843.70
NEWMARKET CORP	89	8,604.64	29,739.35
OLD DOMINION FREIGHT LINE	555	8,773.37	29,426.10
OLIN CORP	732	19,649.44	21,118.20
PRICESMART INC	239	4,636 07	27,614.06
RITCHIE BROS AUCTIONEERS	270	5,074.19	6,191.10
SERVICE CORP INTL	1269	9,123.21	23,006.97
STURM RUGER & CO	235	6,906.60	17,176.15
TEJON RANCH CO	276	6,912.91	10,145.76
TEJON RANCH CO WT EXP	41	0.00	225.05
TEMPUR SEALY INTERNATIONAL	353	14,696.05	19,047.88
TENET HEALTHCARE	481	10,908.85	20,259.72
TREDEGAR CORP	330	4,417.12	9,507 30
VALUECLICK INC	359	4,921.38	8,389.83
WHITE MOUNTAINS INSURANCE GRP	19	5,907.10	11,458.52
WORLD FUEL SVCS CORP	176	7,683.27	7,596.16
		2,302,749.78	2,890,064.65

THE TODD AND BETIANA SIMON FOUNDATION E I N. 47-0820673
FOR THE YEAR ENDED 12/31/13
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PART XV SUPPLEMENTARY INFORMATION
3 a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ALLIANCE OF ARTISTS COMMUNITIES PROVIDENCE, RI 02903	N/A	PUBLIC	PROVIDE SUPPORT FOR ARTISTS' COMMUNITIES	5,000
AMERICAN CANCER SOCIETY OMAHA, NE 68114	N/A	PUBLIC	SUPPORT CANCER RESEARCH	5,000
AMERICAN CRAFT COUNCIL NEW YORK, NY 10012	N/A	PUBLIC	SUPPORT CONTEMPORARY AMERICAN CRAFT	1,000
ANTI-DEFAMATION LEAGUE OMAHA, NE 68154	N/A	PUBLIC	SUPPORT THE FIGHT TO STOP THE DEFAMATION OF JEWISH PEOPLE	12,500
APPLIED INFORMATION MANAGEMENT INSTITUTE OMAHA, NE 68102	N/A	PUBLIC	SUPPORTS ART ADVOCACY	25,000
ART FARM MARQUETTE, NE 68854	N/A	PUBLIC	PROVIDE SUPPORT FOR ARTIST-IN-RESIDENCE PROGRAM	2,200
ARTSPACE SAN ANTONIO, TX 78205	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	1,000
ASPEN ART MUSEUM ASPEN, CO 81611	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	500
BEMIS CENTER FOR CONTEMPORARY ARTS OMAHA, NE 68102	N/A	PUBLIC	SUPPORT ARTISTS-IN RESIDENCE PROGRAM	64,040
BLUEBARN THEATRE OMAHA, NE 68102	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	20,000
BOYS AND GIRLS CLUBS OF THE MIDLANDS OMAHA, NE 68131	N/A	PUBLIC	SUPPORT YOUTH DEVELOPMENT PROGRAMS	6,000
BROWNVILLE CONCERT SERIES BROWNVILLE, NE 68321	N/A	PUBLIC	ENHANCE THE QUALITY OF LIFE IN SOUTHEAST NEBRASKA	500
CENTER FOR JEWISH LIFE OMAHA, NE 68154	N/A	PUBLIC	SPONSORSHIP OF 11TH ANNUAL JEWISH OMAHA FILM FESTIVAL	1,000
CENTRO CRISTIANO LA ROCA OMAHA, NE 68107	N/A	PUBLIC	SUPPORT RELIGIOUS EDUCATION	200
CONFERENCE FOR INCLUSIVE COMMUNITIES OMAHA, NE	N/A	PUBLIC	SUPPORT YOUTH DEVELOPMENT PROGRAMS	2,500
DURHAM WESTERN HERITAGE MUSEUM OMAHA, NE 68108	N/A	PUBLIC	SUPPORT PROVISION OF CULTURAL RESOURCE WITHIN THE COMMUNITY	3,500
FILM STREAMS OMAHA, NE 68102	N/A	PUBLIC	SUPPORT FILM AS ART EXHIBITIONS	30,000
FIRST RESPONDERS' CRITICAL SUPPORT FOUNDATION OMAHA, NE 68116	N/A	PUBLIC	FUND FREE INSTALLATION OF SMOKE/ CARBON MONOXIDE DETECTORS	7,500
GRANTMAKERS IN THE ARTS SEATTLE, WA 98119	N/A	PUBLIC	SUPPORT IMPROVEMENT OF ARTS PHILANTHROPY	1,000

THE TODD AND BETIANA SIMON FOUNDATION E.I.N. 47-0820673
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PART XV SUPPLEMENTARY INFORMATION
3 a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL, RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
HEARTLAND FAMILY SERVICE OMAHA, NE 68105	N/A	PUBLIC	SUPPORT PROTECTION FROM DOMESTIC VIOLENCE	10,000
HOBY NEBRASKA OMAHA, NE 68154	N/A	PUBLIC	SUPPORT YEARLY LEADERSHIP SEMINAR FOR NEBRASKA YOUTH	2,000
HUMANITIES NEBRASKA LINCOLN, NE 68508	N/A	PUBLIC	SPONSOR 18TH ANNUAL GOVERNOR'S LECTURE IN THE HUMANITIES	3,000
INTERNATIONAL SCULPTURE CENTER HAMILTON, NJ 08619	N/A	PUBLIC	SUPPORT ART PROGRAMS	500
JAMES BEARD FOUNDATION NEW YORK, NY 10011	N/A	PUBLIC	CELEBRATE, PRESERVE AND NUTURE AMERICA'S CULINARY HERITAGE	500
JEWISH FAMILY SERVICES OMAHA, NE 68154	N/A	PUBLIC	ASSISTANCE TO INDIGENT FAMILIES	500
JOSLYN ART MUSEUM OMAHA, NE 68102	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	15,500
JUVENILE DIABETES RESEARCH FOUNDATION OMAHA, NE	N/A	PUBLIC	PROMOTE JUVENILE DIABETES HEALTH RESEARCH	250
KENT BELLOWS STUDIO OMAHA, NE 68105	N/A	PUBLIC	SUPPORT PUBLIC ART EXHIBITION	5,000
LAURITZEN GARDENS OMAHA, NE 68108	N/A	PUBLIC	SPONSORSHIP OF PATRON PREVIEW PARTY	10,000
LEGAL AID OF NEBRASKA OMAHA, NE 68102	N/A	PUBLIC	SUPPORT PROVISION OF LEGAL SERVICES TO LOW-INCOME NEBRASKANS	5,000
METROPOLITAN COMMUNITY COLLEGE FOUNDATION OMAHA, NE 68103	N/A	PUBLIC	SUPPORT GREAT PLAINS THEATRE CONFERENCE FUND	19,720
MUSEUM OF MODERN ART NEW YORK, NY 10019	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	70
MUSEUM OF NEBRASKA ART KEARNEY, NE 68847	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	1,000
NEBRASKA CHILDREN AND FAMILIES FOUNDATION LINCOLN, NE 68508	N/A	PUBLIC	PROVIDE SUPPORT IN CREATING QUALITY PROGRAMS FOR KIDS	1,000
NEBRASKA SHAKESPEARE FESTIVAL OMAHA, NE 68178	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	2,500
OMAHA COMMUNITY FOUNDATION OMAHA, NE 68131	N/A	PUBLIC	SUPPORT "LET GOOD GROW" CAMPAIGN	12,500
OMAHA COMMUNITY PLAYHOUSE OMAHA, NE 68132	N/A	PUBLIC	UNDERWRITE "21 & OVER ALTERNATIVE PROGRAMMING"	10,000

THE TODD AND BETIANA SIMON FOUNDATION E.I.N 47-0820673
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PART XV SUPPLEMENTARY INFORMATION
3 a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL, RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
OMAHA CONSERVATORY OF MUSIC OMAHA, NE	N/A	PUBLIC	SUPPORT MUSICAL DEVELOPMENT PROGRAMS FOR YOUTH	50,000
OMAHA CREATIVE INSTITUTE OMAHA, NE 68102	N/A	PUBLIC	SUPPORT PERFORMING ARTS EDUCATION	7,500
OMAHA POLICE FOUNDATION OMAHA, NE 68102	N/A	PUBLIC	PROVIDE FUNDS FOR NEW FIREARMS TRAINING SYSTEM	1,000
OMAHA PUBLIC LIBRARY FOUNDATION OMAHA, NE 68102	N/A	PUBLIC	HELP ENHANCE LIBRARY SYSTEM WITH NEW TECHNOLOGY	5,000
OMAHA PUBLIC SCHOOLS, KIOS-FM OMAHA, NE 68131	N/A	PUBLIC	SUPPORT PUBLIC RADIO BROADCASTING	250
OPENSKY POLICY INSTITUTE LINCOLN, NE 68508	N/A	PUBLIC	IDENTIFY, ANALYZE AND COMMUNICATE FISCAL POLICY IN NEBRASKA	500
PLANNED PARENTHOOD OF THE HEARTLAND OMAHA, NE 68132	N/A	PUBLIC	FOR REPRODUCTIVE HEALTH CARE AND SEXUAL EDUCATION	30,000
PROJECT HARMONY OMAHA, NE 68117	N/A	PUBLIC	SUPPORT PROVISION OF SERVICES TO VICTIMS OF CHILD ABUSE	20,000
RENAISSANCE SOCIETY AT THE UNIVERSITY OF CHICAGO CHICAGO, IL 60637	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	5,000
RESPECT2 OMAHA, NE 68114	N/A	PUBLIC	SUPPORT EDUCATIONAL EFFORTS FOR SAFER RELATIONSHIPS	16,500
SALVATION ARMY OMAHA, NE 68131	N/A	PUBLIC	ASSISTANCE TO INDIGENT FAMILIES	500
SOCIETY FOR CONTEMPORARY ARTS CHICAGO, IL	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	500
SOLOMON R GUGGENHEIM FOUNDATION NEW YORK, NY 10128	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	125
TED E BEAR HOLLOW OMAHA, NE 68114	N/A	PUBLIC	PROVIDE SUPPORT FOR BEREAVED CHILDREN	10,000
TEMPLE ISRAEL OMAHA, NE 68132	N/A	PUBLIC	SUPPORT RELIGIOUS EDUCATION	5,524
UNITED STATES ARTISTS LOS ANGELES, CA 90036	N/A	PUBLIC	PROVIDE SUPPORT FOR ARTISTS	198,000
UNIVERSITY OF NEBRASKA FOUNDATION LINCOLN, NE 68501	N/A	PUBLIC	PROVIDE FUNDING FOR THE WANDA EWING MEMORIAL SCHOLARSHIP FUND	500
VOICES FOR CHILDREN IN NEBRASKA OMAHA, NE 68127	N/A	PUBLIC	SUPPORT PROGRAMS FOR DISADVANTAGED CHILDREN	5,000
WHITNEY MUSEUM OF AMERICAN ART NEW YORK, NY 10021	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	1,000
WOMEN'S FUND OF OMAHA OMAHA, NE 68114	N/A	PUBLIC	SUPPORT IMPROVING THE LIVES OF OMAHA-AREA WOMEN AND CHILDREN	250
			TOTAL GRANTS AND CONTRIBUTIONS	644,629