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## Return of Private Foundation

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

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Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](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>KBR FOUNDATION, INC.</b>		A Employer identification number <b>52-1772480</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>7012 PORTMARNOCK PLACE</b>		B Telephone number <b>941-907-1268</b>
City or town, state or province, country, and ZIP or foreign postal code <b>BRADENTON, FL 34202</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"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <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>5,456,130.</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		212,536.	212,536.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		152,594.			
b Gross sales price for all assets on line 6a <b>755,830.</b>					
7 Capital gain net income (from Part IV, line 2)			152,594.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		365,130.	365,130.		
13 Compensation of officers, directors, trustees, etc.		114,480.	46,440.		68,040.
14 Other employee salaries and wages					
15 Pension plans, employee benefits		49,346.	24,673.		24,673.
16a Legal fees					
b Accounting fees STMT 2		2,975.			2,975.
c Other professional fees STMT 3		17,991.			0.
17 Interest					
18 Taxes STMT 4		4,690.			25.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		9,984.			9,984.
22 Printing and publications					
23 Other expenses STMT 5		1,565.	780.		785.
24 Total operating and administrative expenses. Add lines 13 through 23		201,031.	89,884.		106,482.
25 Contributions, gifts, grants paid		265,830.			265,830.
26 Total expenses and disbursements. Add lines 24 and 25		466,861.	89,884.		372,312.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-101,731.			
b Net investment income (if negative, enter -0-)			275,246.		
c Adjusted net income (if negative, enter -0-)				N/A	

**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	137,900.	69,031.	69,031.
	2 Savings and temporary cash investments	138,715.	587,313.	587,313.
	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 STMT 6	911,002.	401,923.	1,270,235.
	c Investments - corporate bonds STMT 7	0.	410,568.	396,455.
	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 8	2,520,390.	2,137,441.	3,133,096.	
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item 1)	3,708,007.	3,606,276.	5,456,130.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 <b>Total liabilities</b> (add lines 17 through 22)	0.	0.		
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	24 Unrestricted and complete lines 24 through 26 and lines 30 and 31.			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	3,708,007.	3,606,276.	
30 <b>Total net assets or fund balances</b>	3,708,007.	3,606,276.		
31 <b>Total liabilities and net assets/fund balances</b>	3,708,007.	3,606,276.		

**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	3,708,007.
2 Enter amount from Part I, line 27a	2	-101,731.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	3,606,276.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	3,606,276.

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**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 SEE ATTACHED	P	VARIOUS	12/31/13
b SEE ATTACHED	P	VARIOUS	12/31/13
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 50,403.		47,301.	3,102.
b 705,427.		555,935.	149,492.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			3,102.
b			149,492.
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	152,594.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	{ If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	410,260.	4,982,785.	.082335
2011	360,316.	5,211,210.	.069142
2010	312,143.	5,047,823.	.061837
2009	295,475.	4,733,328.	.062424
2008	271,981.	6,094,988.	.044624

2 Total of line 1, column (d)	2	.320362
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	.064072
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	5,227,137.
5 Multiply line 4 by line 3	5	334,913.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,752.
7 Add lines 5 and 6	7	337,665.
8 Enter qualifying distributions from Part XII, line 4	8	372,312.

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	2,752.
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	2,752.
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	2,752.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2,480.	
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	2,480.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	24.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed SEE STATEMENT 9	9	296.	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2014 estimated tax 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?		X
b 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) FL, VA		
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

**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>JOSEPH P. BORNSTEIN</u> Telephone no. ► <u>941 907-1268</u> Located at ► <u>7012 PORTMARNOCK PLACE, BRADENTON, FL</u> ZIP+4 ► <u>34202</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 checked="" type="checkbox"/> Yes <input 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 ► <input type="checkbox"/>	1b	X
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <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 <b>not</b> 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

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

6b

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

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

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOSEPH P. BORNSTEIN	PRESIDENT/DIRECTOR			
7012 PORTMARNOCK PLACE				
BRADENTON, FL 34202	10.00	64,500.	16,125.	0.
LYNN H. BORNSTEIN	SECRETARY/DIRECTOR			
7012 PORTMARNOCK PLACE				
BRADENTON, FL 34202	10.00	28,380.	7,095.	0.
HERBERT S. ROSENBLUM	VICE PRESIDENT/DIRECTOR			
7012 PORTMARNOCK PLACE				
BRADENTON, FL 34202	10.00	10,800.	0.	0.
PAUL M. VINCENT	TREASURER/DIRECTOR			
7012 PORTMARNOCK PLACE				
BRADENTON, FL 34202	10.00	10,800.	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 X****Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities	1a	4,460,831.
b	Average of monthly cash balances	1b	845,907.
c	Fair market value of all other assets	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	5,306,738.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	5,306,738.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	79,601.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,227,137.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	261,357.

**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	261,357.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	2,752.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,752.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	258,605.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	258,605.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	258,605.

**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	372,312.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	372,312.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,752.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	369,560.

**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.

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**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				258,605.
<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				
<b>b</b> From 2009				
<b>c</b> From 2010	20,646.			
<b>d</b> From 2011	100,247.			
<b>e</b> From 2012	166,051.			
<b>f</b> Total of lines 3a through e	286,944.			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4: ▶ \$ 372,312.				
<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				258,605.
<b>e</b> Remaining amount distributed out of corpus	113,707.			
<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:	400,651.			
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
<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	0.			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	400,651.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2009				
<b>b</b> Excess from 2010	20,646.			
<b>c</b> Excess from 2011	100,247.			
<b>d</b> Excess from 2012	166,051.			
<b>e</b> Excess from 2013	113,707.			

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

N/A

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

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

**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
<b>a Paid during the year</b>				
ACTIVE MINDS 2001 S STREET NW, S-450 WASHINGTON, DC 20009	NONE	PC	GENERAL	15,000.
ALEXANDRIA SYMPHONY ORCHESTRA 2121 EISENHOWER AVE, #608 ALEXANDRIA, VA 22314	NONE	PC	GENERAL	2,000.
ALL FAITHS FOOD BANK 8171 BLAIKIE COURT SARASOTA, FL 34240	NONE	PC	GENERAL	2,500.
ALZHEIMER'S ASSOCIATION 14010 ROOSEVELT BLVD, SUITE 709 CLEARWATER, FL 33762	NONE	PC	GENERAL	5,000.
AUDUBON NATURALIST SOCIETY 8940 JONES MILL ROAD CHEVY CHASE, MD 20815	NONE	PC	SANCTUARY WATERSHED ADVENTURE PROGRAM	15,000.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			<b>3a</b> 265,830.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				<b>3b</b> 0.

**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
BEAT THE ODDS 25 E STREET NW WASHINGTON, DC 20001	NONE	PC	GENERAL	5,000.
BORROMEO HOUSING 3304 WASHINGTON BLVD ARLINGTON, VA 22201	NONE	PC	GENERAL	2,500.
CENTER FOR BUILDING HOPE 5481 COMMUNICATIONS PKWY SARASOTA, FL 34240	NONE	PC	GENERAL	5,000.
CHEYNEY UNIVERSITY UNIVERSITY CIRCLE CHEYNEY, PA 19319	NONE	PC	SCHOLARSHIPS	22,500.
DUNBAR ALEXANDRIA OLYMPIC BRANCH BOYS & GIRLS CLUB 401 N PAYNE ST ALEXANDRIA, VA 22314	NONE	PC	GENERAL	7,500.
EASTER SEALS OF SW FL 350 BRADEN AVE SARASOTA, FL 34243	NONE	PC	GENERAL	2,500.
EMBRACING OUR DIFFERENCES P.O. BOX 2559 SARASOTA, FL 34230	NONE	PC	GENERAL	2,000.
GREEN DOOR 1221 TAYLOR ST NW WASHINGTON, DC 20011	NONE	PC	GENERAL	7,500.
HEALTHY START COALITION 1750 17TH ST, #A SARASOTA, FL 34234	NONE	PC	GENERAL	2,500.
JEWISH FAMILY AND CHILDREN'S SERVICES 2688 FRUITVILLE RD SARASOTA, FL 34237	NONE	PC	CAMP MARIPOSA	10,000.
<b>Total from continuation sheets</b>				<b>226,330.</b>

**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
JUBILEE HOUSING 1640 COLUMBIA RD NW #2 WASHINGTON, DC 20009	NONE	PC	GENERAL	6,000.
KOBERNICK-ANCHIN 1951 NORTH HONORE AVE SARASOTA, FL 34235	NONE	PC	ABATEMENT PROGRAM	25,000.
MANASOTA ASACH P.O. BOX 2356 SARASOTA, FL 34230	NONE	PC	GENERAL	7,500.
MARINE CORP SCHOLARSHIP FOUNDATION 909 N WASHINGTON ST, S-400 ALEXANDRIA, VA 22314	NONE	PC	GENERAL	5,000.
MEALS ON WHEELS PLUS 811 23RD AVE EAST BRADENTON, FL 34208	NONE	PC	GENERAL	5,000.
MIRACLE LEAGUE OF MANASOTA, INC. 8466 N. LOCKWOOD RIDGE ROAD #344 SARASOTA, FL 34243	NONE	PC	BIRDLAND CHARITY	650.
MY SISTER'S PLACE P.O. BOX 29596 WASHINGTON, DC 20017	NONE	PC	GENERAL	1,500.
N ST. VILLAGE 1333 N STREET NW WASHINGTON, DC 20005	NONE	PC	GENERAL	2,500.
NATIONAL CENTER FOR CHILDREN AND FAMILIES 6301 GREENTREE RD BETHESDA, MD 20817	NONE	PC	GENERAL	1,500.
NORTHERN VIRGINIA FAMILY SERVICES 10455 WHITE GRANITE DR S-100 OAKTON, VA 22124	NONE	PC	GENERAL	3,000.
<b>Total from continuation sheets</b>				

**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
PEDIATRIC PRIMARY CARE 1515 E SILVER SPRINGS BLVD OCALA, FL 34470	NONE	PC	GENERAL	6,000.
PERRY SCHOOL COMMUNITY SERVICES 128 M STREET NW, S-100 WASHINGTON, DC 20001	NONE	PC	GENERAL	3,000.
RINGLING COLLEGE OF ART & DESIGN 2700 N TAMiami TRAIL SARASOTA, FL 34234	NONE	PC	YEA ARTS	2,500.
RONALD MCDONALD HOUSE OF TAMPA BAY 35 COLUMBIA DR TAMPA, FL 33606	NONE	PC	GENERAL	2,500.
SARASOTA MEMORIAL HEALTH CARE FOUNDATION 1515 S OSPREY AVE, #B4 SARASOTA, FL 34239	NONE	PC	GENERAL	1,180.
SARASOTA SEASON OF SCULPTURE 240 S. PINEAPPLE AVE #400 SARASOTA, FL 34236	NONE	PC	GENERAL	5,000.
SCHOLARSHIP FUND OF ALEXANDRIA 3330 KING ST ALEXANDRIA, VA 22302	NONE	PC	GENERAL	15,000.
SEE FOREVER 1436 U STREET NW, S-203 WASHINGTON, DC 20009	NONE	PC	GENERAL	2,000.
SEEC 8905 FAIRVIEW RD, S-300 SILVER SPRING, MD 20910	NONE	PC	GENERAL	2,500.
SIBLEY MEMORIAL HOSPITAL 5255 LOUGHBORO RD, NW WASHINGTON, DC 20016	NONE	PC	GENERAL	35,000.
Total from continuation sheets				

**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
SO OTHERS MAY EAT 71 O STREET NW WASHINGTON, DC 20001	NONE	PC	GENERAL	5,000.
STARLIGHT CHILDREN'S FOUNDATION 4300 NORTH UNIVERSITY DR, S-F101 LAUDERHILL, FL 33351	NONE	PC	GENERAL	2,500.
TEARDROPS TO RAINBOWS P.O. BOX 1059 CENTERVILLE, VA 20122	NONE	PC	GENERAL	4,000.
TIDEWELL HOSPICE 5955 RAND BLVD SARASOTA, FL 34238	NONE	PC	GENERAL	10,000.
WRIGHT TO READ 414 NORTH WASHINGTON ST, S-101 ALEXANDRIA, VA 22314	NONE	PC	GENERAL	2,500.
YUMMY STUFF CLUB, INC. 1809 LOMA LINDA ST SARASOTA, FL 34239	NONE	PC	CHILDREN'S HEALTHY PANTRY PROGRAM	3,000.
<b>Total from continuation sheets</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
CHARLES SCHWAB	212,536.	0.	212,536.	212,536.	
TO PART I, LINE 4	212,536.	0.	212,536.	212,536.	

FORM 990-PF	ACCOUNTING FEES				STATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING	2,975.	0.		2,975.	
TO FORM 990-PF, PG 1, LN 16B	2,975.	0.		2,975.	

FORM 990-PF	OTHER PROFESSIONAL FEES				STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MANAGEMENT FEES	17,991.	17,991.		0.	
TO FORM 990-PF, PG 1, LN 16C	17,991.	17,991.		0.	

FORM 990-PF	TAXES				STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ANNUAL REPORT	25.	0.		25.	
EXCISE TAX	4,665.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	4,690.	0.		25.	

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSE	10.	0.		10.
PAYROLL PREP	725.	0.		725.
BANK CHARGES	780.	780.		0.
POSTAGE	50.	0.		50.
TO FORM 990-PF, PG 1, LN 23	1,565.	780.		785.

FORM 990-PF	CORPORATE STOCK	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED	401,923.	1,270,235.
TOTAL TO FORM 990-PF, PART II, LINE 10B	401,923.	1,270,235.

FORM 990-PF	CORPORATE BONDS	STATEMENT	7
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED	410,568.	396,455.
TOTAL TO FORM 990-PF, PART II, LINE 10C	410,568.	396,455.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	8
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED-MUTUAL FUNDS	COST	1,777,246.	2,796,569.
SEE ATTACHED-OTHER	COST	360,195.	336,527.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,137,441.	3,133,096.

8/28/2014

## Holdings for KBR Foundation (REP-KBRFnd1)

Expand all Collapse all

As of 12/31/2013

Symbol	Description	Quantity	Price	Cost Basis	Value	Unrealized Gain/Loss	Percent Gain/Loss	Current Yield	Weight
<b>▼ Money Market</b>									
<u>SWGXX</u>	Schwab Government Money Fund			587,312.91	587,312.91	0.00	0.00%	0.00%	10.90%
	<b>Money Market Total</b>			<b>587,312.91</b>	<b>587,312.91</b>	<b>0.00</b>	<b>0.00%</b>	<b>0.00%</b>	<b>10.90%</b>
<b>▼ Fixed Income</b>									
<u>31394C</u>	Fed Natl Mtg 10/25/2034 5 500% Factor 0.13829510	335,000.00	99.02	63,158.40	47,807.70	(15,350.70)	(24.31%)	5.55%	0.89%
	Accrued Income				44.26				
<u>LSBDX</u>	Loomis Sayles Bond CII	6,850.477	15.16	93,979.28	103,853.23	9,873.95	10.51%	4.56%	1.93%
<u>PITRX</u>	PIMCO Total Return Instl	19,307.653	10.69	214,240.18	206,398.81	(7,841.37)	(3.66%)	2.20%	3.83%
<u>TPICZ</u>	Templeton Global Bond	2,918.612	13.14	39,190.04	38,350.56	(839.48)	(2.14%)	5.59%	0.71%
	<b>Fixed Income Total</b>			<b>410,567.90</b>	<b>396,454.56</b>	<b>(14,157.60)</b>	<b>(3.45%)</b>	<b>3.55%</b>	<b>7.36%</b>
<b>▼ Large Cap Equities</b>									
<u>MMM</u>	3M Company	600.00	140.25	16,676.91	84,150.00	67,473.09	404.59%	2.44%	1.56%
<u>MO</u>	Altria Group	2,400.00	38.39	19,132.65	92,136.00	73,003.35	381.56%	5.00%	1.71%
<u>CVX</u>	Chevron	1,450.00	124.91	28,767.27	181,119.50	152,352.23	529.60%	3.43%	3.36%
<u>CSCO</u>	Cisco Systems	1,500.00	22.43	34,865.95	33,645.00	(1,220.95)	(3.50%)	3.39%	0.62%
<u>C</u>	Citigroup	266.00	52.11	4,057.12	13,861.26	9,804.14	241.65%	0.08%	0.26%
<u>CMCSA</u>	Comcast A	1,528.00	51.97	35,771.48	79,402.52	43,631.04	121.97%	1.73%	1.47%
<u>XOM</u>	ExxonMobil	3,050.00	101.20	58,891.97	308,660.00	249,768.03	424.11%	2.73%	5.73%
<u>IBM</u>	IBM	300.00	187.57	37,712.65	56,271.00	18,558.35	49.21%	2.35%	1.04%
<u>JNJ</u>	Johnson & Johnson	400.00	91.59	23,444.55	36,636.00	13,191.45	56.27%	3.06%	0.68%
<u>JPM</u>	JPMorgan Chase	1,300.00	58.48	29,358.74	76,024.00	46,665.26	158.95%	2.74%	1.41%
<u>KRFT</u>	Kraft Foods Group Inc Com Npv	553.00	53.91	0.00	29,812.23	29,812.23	100.00%	3.90%	0.55%
<u>MSFT</u>	Microsoft	1,200.00	37.41	48,282.45	44,892.00	(3,390.45)	(7.02%)	2.99%	0.83%
<u>MDLZ</u>	Mondelez Intl Inc Com	1,660.00	35.30	0.00	58,598.00	58,598.00	100.00%	1.59%	1.09%
<u>MON</u>	Monsanto	400.00	116.55	20,362.64	46,620.00	26,257.36	128.95%	1.48%	0.87%
<u>PM</u>	Philip Morris International	1,100.00	87.13	19,982.11	95,843.00	75,860.89	379.64%	4.32%	1.78%
<u>PG</u>	Procter & Gamble	400.00	81.41	24,616.55	32,564.00	7,947.45	32.28%	3.16%	0.60%
	<b>Large Cap Equities Total</b>			<b>401,923.04</b>	<b>1,270,234.51</b>	<b>868,311.47</b>	<b>216.04%</b>	<b>2.96%</b>	<b>23.58%</b>
<b>▼ Large Cap Value</b>									
<u>VDC</u>	Vanguard Consumer Staples	700.00	110.08	46,261.03	77,056.00	30,794.97	66.57%	2.21%	1.43%
	<b>Large Cap Value Total</b>			<b>46,261.03</b>	<b>77,056.00</b>	<b>30,794.97</b>	<b>66.57%</b>	<b>2.21%</b>	<b>1.43%</b>
<b>▼ Large Cap Core</b>									
<u>FAIRX</u>	Fairholme Fund	5,016.117	39.20	134,402.61	196,631.79	62,229.18	46.30%	0.00%	3.65%
<u>SLADX</u>	Selected American Shares C I D	8,712.922	50.26	315,086.58	437,911.46	122,824.88	38.98%	0.80%	8.13%
	<b>Large Cap Core Total</b>			<b>449,489.19</b>	<b>634,543.25</b>	<b>185,054.06</b>	<b>41.17%</b>	<b>0.55%</b>	<b>11.78%</b>
<b>▼ Large Cap Growth</b>									
<u>VPCCX</u>	Vanguard Primecap Core	24,624.852	19.44	279,870.27	478,707.12	198,836.85	71.05%	0.92%	8.89%
	<b>Large Cap Growth Total</b>			<b>279,870.27</b>	<b>478,707.12</b>	<b>198,836.85</b>	<b>71.05%</b>	<b>0.92%</b>	<b>8.89%</b>
<b>▼ Small Cap</b>									
<u>ATASX</u>	Aston/TAMRO Small Cap	7,076.765	22.47	120,462.00	159,014.91	38,552.91	32.00%	0.00%	2.95%
<u>RAISX</u>	Rainier Small/Mid Cap Inst	5,599.493	49.45	200,502.78	276,894.93	76,392.15	38.10%	0.00%	5.14%
<u>PENNIX</u>	Royce Pennsylvania Mutual Investors	15,145.487	14.73	147,989.58	223,093.02	75,103.44	50.75%	0.01%	4.14%
	<b>Small Cap Total</b>			<b>468,954.36</b>	<b>659,002.86</b>	<b>190,048.50</b>	<b>40.53%</b>	<b>0.00%</b>	<b>12.23%</b>
<b>▼ Tactical</b>									

## KBR FOUNDATION, INC

52-1772480  
Holdings

8/28/2014

<u>PRHSX</u>	T Rowe Price Health Sciences	3,375,143	57.80	97,553.01	195,083.27	97,530.26	99.98%	0.00%	3.62%
<u>VGHCX</u>	Vanguard Specialized Health Care	1,510,566	187.16	191,060.92	282,717.53	91,656.61	47.97%	1.33%	5.25%
<b>Tactical Total</b>				<b>288,613.93</b>	<b>477,800.80</b>	<b>189,186.87</b>	<b>65.55%</b>	<b>0.79%</b>	<b>8.87%</b>

## ▼ International Large Cap

<u>KXI</u>	iShares S&P Global Consumer Staples	3,225.00	86.18	145,906.69	277,930.50	132,023.81	90.49%	2.31%	5.16%
<u>TGMIX</u>	Thornburg International Value I	5,974,063	32.06	98,150.25	191,528.46	93,378.21	95.14%	1.11%	3.56%
<b>International Large Cap Total</b>				<b>244,056.94</b>	<b>469,458.96</b>	<b>225,402.02</b>	<b>92.36%</b>	<b>1.82%</b>	<b>8.71%</b>

## ▼ Alternative

<u>ASFIX</u>	Absolute Strategies Fund	7,256,741	10.97	76,396.28	79,606.45	3,210.17	4.20%	0.00%	1.48%
<u>CGMRX</u>	CGM Realty Fund	4,939,109	30.76	133,799.17	151,926.99	18,127.82	13.55%	0.57%	2.82%
<u>557529104</u>	Madison Harbor Balanced Strategies	150.00	699.96	150,000.00	104,994.00	(45,006.00)	(30.00%)	0.00%	1.95%
<b>Alternative Total</b>				<b>360,195.45</b>	<b>336,527.44</b>	<b>(23,668.01)</b>	<b>(6.57%)</b>	<b>0.26%</b>	<b>6.25%</b>

**Total**
**3,537,245.02 5,387,098.41 1,849,809.13 52.30% 1.38% 100.00%**

## YEAR-END SUMMARY INFORMATION IS NOT PROVIDED TO THE IRS.

The information in this and all subsequent sections is not provided to the IRS by Charles Schwab. It is provided to you as additional tax reporting information you may need to complete your tax return.

Date Prepared: February 7, 2014

## REALIZED GAIN OR (LOSS)

The information in the following sections include all your realized gain or (loss) transactions during the tax year. They may be helpful for, but not limited to, Schedule D. Please consult with your tax advisor or financial advisor regarding specific questions.

## Short-Term Realized Gain or (Loss)

This section is for covered securities and corresponds to transactions reported on your 1099-B as "cost basis is reported to the IRS." Report on Form 8949, Part I, with Box A checked.

Description	CUSIP Number	Quantity/Par	Date of Acquisition	Date of Sale	Total Proceeds	Cost Basis	Wash Sale Loss Disallowed	Realized Gain or (Loss)
COLUMBIA GLBL ENERGY & 19765Y829		5.27	06/22/12	02/05/13	\$ 113.79	\$ 94.64	\$ 0.00	\$ 19.15
COLUMBIA GLBL ENERGY & 19765Y829		4.02	09/25/12	02/05/13	\$ 86.84	\$ 83.99	\$ 0.00	\$ 2.85
COLUMBIA GLBL ENERGY & 19765Y829		4.54	12/11/12	02/05/13	\$ 98.12	\$ 91.53	\$ 0.00	\$ 6.59
Security Subtotal					\$ 298.75	\$ 270.16	\$ 0.00	\$ 28.59
HUSSMAN STRATEGIC GRO 448108100		83.56	12/31/12	02/05/13	\$ 872.84	\$ 894.98	\$ 0.00	\$ (22.14)
Security Subtotal					\$ 872.84	\$ 894.98	\$ 0.00	\$ (22.14)
SELECTED AMERICAN SHAR 816221204		13.21	12/18/12	02/05/13	\$ 589.96	\$ 557.74	\$ 0.00	\$ 32.22
SELECTED AMERICAN SHAR 816221204		157.46	12/18/12	02/05/13	\$ 7,030.81	\$ 6,646.58	\$ 0.00	\$ 384.23
SELECTED AMERICAN SHAR 816221204		462.68	12/18/12	02/05/13	\$ 20,658.84	\$ 19,529.91	\$ 0.00	\$ 1,128.93
Security Subtotal					\$ 28,279.61	\$ 26,734.23	\$ 0.00	\$ 1,545.38
THORNBURG INTL VALUE FD 885215566		20.82	03/26/12	02/05/13	\$ 608.47	\$ 573.83	\$ 0.00	\$ 34.64
THORNBURG INTL VALUE FD 885215566		54.33	06/25/12	02/05/13	\$ 1,587.11	\$ 1,325.66	\$ 0.00	\$ 261.45
THORNBURG INTL VALUE FD 885215566		27.74	09/24/12	02/05/13	\$ 810.44	\$ 749.90	\$ 0.00	\$ 60.54
Security Subtotal					\$ 3,006.02	\$ 2,649.39	\$ 0.00	\$ 356.63
VANGUARD PRIMECAP COR 921921508		552.07	12/17/12	02/05/13	\$ 8,853.58	\$ 8,264.63	\$ 0.00	\$ 588.95

Please see the "Endnotes for Your Realized Gain or (Loss)" for an explanation of the codes and symbols in this Realized Gain or (Loss) section.

Schwab One® Account of  
KBR FOUNDATION INC

charlesSCHWAB

TAX YEAR 2013  
YEAR-END SUMMARY

## YEAR-END SUMMARY INFORMATION IS NOT PROVIDED TO THE IRS.

The information in this and all subsequent sections is not provided to the IRS by Charles Schwab. It is provided to you as additional tax reporting information you may need to complete your tax return.

Date Prepared: February 7, 2014

## Short-Term Realized Gain or (Loss) (continued)

This section is for covered securities and corresponds to transactions reported on your 1099-B as "cost basis is reported to the IRS." Report on Form 8949, Part I, with Box A checked.

Description	CUSIP Number	Quantity/Par	Date of Acquisition	Date of Sale	Total Proceeds	Cost Basis	Loss Disallowed	Wash Sale	Realized Gain or (Loss)
VANGUARD PRIMECAP COR	921921508	566.94	12/17/12	02/05/13	\$ 9,091.95	\$ 8,487.14	\$ 0.00	\$ 0.00	\$ 604.81
Security Subtotal					\$ 17,945.53	\$ 16,751.77	\$ 0.00	\$ 0.00	\$ 1,193.76
Total Short-Term (Cost basis is reported to the IRS)					\$ 50,402.75	\$ 47,300.53	\$ 0.00	\$ 0.00	\$ 3,102.22
Total Short-Term					\$ 50,402.75	\$ 47,300.53	\$ 0.00	\$ 0.00	\$ 3,102.22

## Long-Term Realized Gain or (Loss)

The transactions in this section are not reported on Form 1099-B or to the IRS Report on Form 8949, Part II, with Box C checked.

Description	CUSIP Number	Quantity/Par	Date of Acquisition	Date of Sale	Total Proceeds	Cost Basis	Loss Disallowed	Wash Sale	Realized Gain or (Loss)
CME GROUP INC CL A	CL 12572Q105	200.00	04/23/10	02/05/13	\$ 11,788.18	\$ 13,439.56 <sup>a</sup>	\$ 0.00	\$ 0.00	\$ (1,651.38)
CME GROUP INC CL A	CL 12572Q105	500.00	04/23/10	02/05/13	\$ 29,464.45	\$ 33,598.89 <sup>a</sup>	\$ 0.00	\$ 0.00	\$ (4,134.44)
Security Subtotal					\$ 41,252.63	\$ 47,038.45	\$ 0.00	\$ 0.00	\$ (5,785.82)
COLUMBIA GLBL ENERGY &	19765Y829	1,647.44	05/28/10	02/05/13	\$ 35,535.41	\$ 30,000.00 <sup>a</sup>	\$ 0.00	\$ 0.00	\$ 5,535.41
COLUMBIA GLBL ENERGY &	19765Y829	1.03	09/22/10	02/05/13	\$ 22.30	\$ 19.28 <sup>a</sup>	\$ 0.00	\$ 0.00	\$ 3.02
COLUMBIA GLBL ENERGY &	19765Y829	1.52	03/24/11	02/05/13	\$ 32.81	\$ 38.41	\$ 0.00	\$ 0.00	\$ (5.60)
COLUMBIA GLBL ENERGY &	19765Y829	2.66	06/23/11	02/05/13	\$ 57.44	\$ 60.23	\$ 0.00	\$ 0.00	\$ (2.79)
COLUMBIA GLBL ENERGY &	19765Y829	2.19	09/22/11	02/05/13	\$ 47.39	\$ 40.49	\$ 0.00	\$ 0.00	\$ 6.90

Please see the "Endnotes for Your Realized Gain or (Loss)" for an explanation of the codes and symbols in this Realized Gain or (Loss) section.



Schwab One® Account of  
KBR FOUNDATION INC

charles SCHWAB

TAX YEAR 2013  
YEAR-END SUMMARY

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Date Prepared: February 7, 2014

## Long-Term Realized Gain or (Loss) (continued)

The transactions in this section are not reported on Form 1099-B or to the IRS Report on Form 8949, Part II, with Box C checked

Description	CUSIP Number	Quantity/Par	Date of Acquisition	Date of Sale	Total Proceeds	Cost Basis	Wash Sale Loss Disallowed	Realized Gain or (Loss)
COLUMBIA GLBL ENERGY & 19765Y829	2.78	12/08/11	02/05/13	\$	59.96 \$	56.48 \$	0.00 \$	3.48
COLUMBIA GLBL ENERGY & 19765Y829	29.04	12/08/11	02/05/13	\$	626.44 \$	590.14 \$	0.00 \$	36.30
Security Subtotal				\$	36,381.75 \$	30,805.03 \$	0.00 \$	5,576.72
EXXON MOBIL CORPORATIO 30231G102	50.00	12/31/99	02/05/13	\$	4,499.67 \$	965.44 <sup>a</sup> \$	0.00 \$	3,534.23
EXXON MOBIL CORPORATIO 30231G102	100.00	12/31/99	02/05/13	\$	8,999.34 \$	1,930.88 <sup>a</sup> \$	0.00 \$	7,068.46
EXXON MOBIL CORPORATIO 30231G102	100.00	12/31/99	02/05/13	\$	8,999.35 \$	1,930.88 <sup>a</sup> \$	0.00 \$	7,068.47
EXXON MOBIL CORPORATIO 30231G102	100.00	12/31/99	02/05/13	\$	8,999.44 \$	1,930.88 <sup>a</sup> \$	0.00 \$	7,068.56
Security Subtotal				\$	31,497.80 \$	6,758.08 \$	0.00 \$	24,739.72
FAIRHOLME FUND 304871106	2,856.70	02/17/06	02/05/13	\$	95,819.32 \$	74,151.44 <sup>a</sup> \$	0.00 \$	21,667.88
FAIRHOLME FUND 304871106	51.61	12/14/06	02/05/13	\$	1,731.20 \$	1,503.04 <sup>a</sup> \$	0.00 \$	228.16
FAIRHOLME FUND 304871106	72.88	12/14/06	02/05/13	\$	2,444.70 \$	2,122.51 <sup>a</sup> \$	0.00 \$	322.19
FAIRHOLME FUND 304871106	61.09	12/19/07	02/05/13	\$	2,049.08 \$	1,898.78 <sup>a</sup> \$	0.00 \$	150.30
FAIRHOLME FUND 304871106	67.91	12/19/07	02/05/13	\$	2,277.83 \$	2,110.74 <sup>a</sup> \$	0.00 \$	167.09
FAIRHOLME FUND 304871106	70.01	12/19/07	02/05/13	\$	2,348.44 \$	2,176.18 <sup>a</sup> \$	0.00 \$	172.26
FAIRHOLME FUND 304871106	84.08	12/16/09	02/05/13	\$	2,820.24 \$	2,481.35 <sup>a</sup> \$	0.00 \$	338.89
FAIRHOLME FUND 304871106	69.61	12/16/10	02/05/13	\$	2,335.09 \$	2,355.25 \$	0.00 \$	(20.16)
FAIRHOLME FUND 304871106	375.80	12/16/10	02/05/13	\$	12,605.33 \$	12,714.13 \$	0.00 \$	(108.80)
FAIRHOLME FUND 304871106	16.95	12/31/10	02/05/13	\$	568.77 \$	599.79 \$	0.00 \$	(31.02)
Security Subtotal				\$	125,000.00 \$	102,113.21 \$	0.00 \$	22,886.79

Please see the "Endnotes for Your Realized Gain or (Loss)" for an explanation of the codes and symbols in this Realized Gain or (Loss) section.

Schwab One® Account of  
KBR FOUNDATION INC*charles SCHWAB*TAX YEAR 2013  
YEAR-END SUMMARY

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Date Prepared: February 7, 2014

## Long-Term Realized Gain or (Loss) (continued)

The transactions in this section are not reported on Form 1099-B or to the IRS Report on Form 8949, Part II, with Box C checked

Description	CUSIP Number	Quantity/Par	Date of Acquisition	Date of Sale	Total Proceeds	Cost Basis	Wash Sale Loss Disallowed	Realized Gain or (Loss)
HUSSMAN STRATEGIC GRO	448108100	5,845.67	12/21/09	02/05/13	\$ 61,057.96	\$ 75,030.00 <sup>a</sup>	\$ 0.00	\$ (13,972.04)
HUSSMAN STRATEGIC GRO	448108100	7.68	12/31/09	02/05/13	\$ 80.27	\$ 98.21 <sup>a</sup>	\$ 0.00	\$ (17.94)
HUSSMAN STRATEGIC GRO	448108100	13.19	12/31/10	02/05/13	\$ 137.80	\$ 162.14	\$ 0.00	\$ (24.34)
HUSSMAN STRATEGIC GRO	448108100	29.21	12/30/11	02/05/13	\$ 305.15	\$ 363.14	\$ 0.00	\$ (57.99)
Security Subtotal					\$ 61,581.18	\$ 75,653.49	\$ 0.00	\$ (14,072.31)
ISHARES S&P GBL CONSUM	464288737	350.00	12/11/08	02/05/13	\$ 27,231.69	\$ 15,846.56 <sup>a</sup>	\$ 0.00	\$ 11,385.13
ISHARES S&P GBL CONSUM	464288737	600.00	11/21/11	02/05/13	\$ 46,682.90	\$ 38,325.13	\$ 0.00	\$ 8,357.77
Security Subtotal					\$ 73,914.59	\$ 54,171.69	\$ 0.00	\$ 19,742.90
JPMORGAN CHASE & CO	46625H100	430.00	04/15/94	02/05/13	\$ 20,932.87	\$ 9,710.97 <sup>a</sup>	\$ 0.00	\$ 11,221.90
Security Subtotal					\$ 20,932.87	\$ 9,710.97	\$ 0.00	\$ 11,221.90
MONSANTO CO NEW DEL	61166W101	100.00	05/28/10	02/05/13	\$ 10,211.82	\$ 5,090.69 <sup>a</sup>	\$ 0.00	\$ 5,121.13
Security Subtotal					\$ 10,211.82	\$ 5,090.69	\$ 0.00	\$ 5,121.13
PHILIP MORRIS INTL INC	718172109	100.00	11/15/94	02/05/13	\$ 8,788.15	\$ 1,816.56 <sup>a</sup>	\$ 0.00	\$ 6,971.59
Security Subtotal					\$ 8,788.15	\$ 1,816.56	\$ 0.00	\$ 6,971.59
SELECTED AMERICAN SHAR	816221204	110.30	03/01/00	02/05/13	\$ 4,925.30	\$ 3,908.99 <sup>a</sup>	\$ 0.00	\$ 1,016.31
SELECTED AMERICAN SHAR	816221204	337.89	03/14/00	02/05/13	\$ 15,087.02	\$ 11,952.79 <sup>a</sup>	\$ 0.00	\$ 3,134.23
SELECTED AMERICAN SHAR	816221204	59.92	12/01/04	02/05/13	\$ 2,675.56	\$ 2,177.47 <sup>a</sup>	\$ 0.00	\$ 498.09
SELECTED AMERICAN SHAR	816221204	56.85	12/01/05	02/05/13	\$ 2,538.49	\$ 2,300.27 <sup>a</sup>	\$ 0.00	\$ 238.22

Please see the "Endnotes for Your Realized Gain or (Loss)" for an explanation of the codes and symbols in this Realized Gain or (Loss) section.

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Date Prepared: February 7, 2014

## Long-Term Realized Gain or (Loss) (continued)

The transactions in this section are not reported on Form 1099-B or to the IRS Report on Form 8949, Part II, with Box C checked.

Description	CUSIP Number	Quantity/Par	Date of Acquisition	Date of Sale	Total Proceeds	Cost Basis	Wash Sale Loss Disallowed	Realized Gain or (Loss)
SELECTED AMERICAN SHAR	816221204	77.18	12/01/06	02/05/13	\$ 3,446.40	\$ 3,472.63 <sup>a</sup>	0.00	\$ (26.23)
SELECTED AMERICAN SHAR	816221204	110.75	12/03/07	02/05/13	\$ 4,944.99	\$ 5,315.99 <sup>a</sup>	0.00	\$ (371.00)
SELECTED AMERICAN SHAR	816221204	89.82	12/01/09	02/05/13	\$ 4,010.46	\$ 3,300.00 <sup>a</sup>	0.00	\$ 710.46
SELECTED AMERICAN SHAR	816221204	135.34	12/01/10	02/05/13	\$ 6,043.11	\$ 5,354.19	0.00	\$ 688.92
SELECTED AMERICAN SHAR	816221204	68.28	12/21/11	02/05/13	\$ 3,049.06	\$ 2,670.08	0.00	\$ 378.98
Security Subtotal					\$ 46,720.39	\$ 40,452.41	0.00	\$ 6,267.98
THORNBURG INTL VALUE FD	885215566	1,493.73	11/05/03	02/05/13	\$ 43,635.60	\$ 24,278.12 <sup>a</sup>	0.00	\$ 19,357.48
THORNBURG INTL VALUE FD	885215566	39.96	12/31/04	02/05/13	\$ 1,167.56	\$ 828.53 <sup>a</sup>	0.00	\$ 339.03
THORNBURG INTL VALUE FD	885215566	27.42	12/26/08	02/05/13	\$ 801.06	\$ 515.81 <sup>a</sup>	0.00	\$ 285.25
THORNBURG INTL VALUE FD	885215566	34.50	06/26/09	02/05/13	\$ 1,007.92	\$ 732.16 <sup>a</sup>	0.00	\$ 275.76
THORNBURG INTL VALUE FD	885215566	13.07	12/23/11	02/05/13	\$ 381.84	\$ 320.36	0.00	\$ 61.48
Security Subtotal					\$ 46,993.98	\$ 26,674.98	0.00	\$ 20,319.00
VANGUARD CONSUMR STAP	92204A207	100.00	05/28/10	02/05/13	\$ 9,409.44	\$ 6,608.72 <sup>a</sup>	0.00	\$ 2,800.72
Security Subtotal					\$ 9,409.44	\$ 6,608.72	0.00	\$ 2,800.72
VANGUARD PRIMECAP COR	921921508	8,234.46	06/29/07	02/05/13	\$ 132,054.47	\$ 113,325.18 <sup>a</sup>	0.00	\$ 18,729.29
Security Subtotal					\$ 132,054.47	\$ 113,325.18	0.00	\$ 18,729.29
VODAFONE GROUP NEW AD	92857W209	19.00	05/28/10	02/05/13	\$ 510.99	\$ 381.99 <sup>a</sup>	0.00	\$ 129.00
VODAFONE GROUP NEW AD	92857W209	19.00	05/28/10	02/05/13	\$ 511.02	\$ 381.99 <sup>a</sup>	0.00	\$ 129.03
VODAFONE GROUP NEW AD	92857W209	81.00	05/28/10	02/05/13	\$ 2,178.45	\$ 1,628.48 <sup>a</sup>	0.00	\$ 549.97

Please see the "Endnotes for Your Realized Gain or (Loss)" for an explanation of the codes and symbols in this Realized Gain or (Loss) section.

Schwab One® Account of  
KBR FOUNDATION INC

charlesschwab

TAX YEAR 2013  
YEAR-END SUMMARY

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Date Prepared: February 7, 2014

## Long-Term Realized Gain or (Loss) (continued)

The transactions in this section are not reported on Form 1099-B or to the IRS Report on Form 8949, Part II, with Box C checked.

Description	CUSIP Number	Quantity/Par	Date of Acquisition	Date of Sale	Total Proceeds	Cost Basis	Wash Sale Loss Disallowed	Realized Gain or (Loss)
VODAFONE GROUP NEW AD	92857W209	81.00	05/28/10	02/05/13	\$ 2,178.45	\$ 1,628.48 <sup>a</sup>	\$ 0.00	\$ 549.97
VODAFONE GROUP NEW AD	92857W209	100.00	05/28/10	02/05/13	\$ 2,689.44	\$ 2,010.43 <sup>a</sup>	\$ 0.00	\$ 679.01
VODAFONE GROUP NEW AD	92857W209	100.00	05/28/10	02/05/13	\$ 2,689.44	\$ 2,010.47 <sup>a</sup>	\$ 0.00	\$ 678.97
VODAFONE GROUP NEW AD	92857W209	100.00	05/28/10	02/05/13	\$ 2,689.44	\$ 2,010.48 <sup>a</sup>	\$ 0.00	\$ 678.96
VODAFONE GROUP NEW AD	92857W209	119.00	05/28/10	02/05/13	\$ 3,200.56	\$ 2,392.46 <sup>a</sup>	\$ 0.00	\$ 808.10
VODAFONE GROUP NEW AD	92857W209	181.00	05/28/10	02/05/13	\$ 4,868.07	\$ 3,638.92 <sup>a</sup>	\$ 0.00	\$ 1,229.15
VODAFONE GROUP NEW AD	92857W209	200.00	05/28/10	02/05/13	\$ 5,378.89	\$ 4,020.89 <sup>a</sup>	\$ 0.00	\$ 1,358.00
VODAFONE GROUP NEW AD	92857W209	500.00	05/28/10	02/05/13	\$ 13,447.72	\$ 10,052.33 <sup>a</sup>	\$ 0.00	\$ 3,395.39
Security Subtotal				\$	\$ 40,342.47	\$ 30,156.92	\$ 0.00	\$ 10,185.55
3M COMPANY	88579Y101	100.00	11/15/94	02/05/13	\$ 10,172.79	\$ 2,779.48 <sup>a</sup>	\$ 0.00	\$ 7,393.31
3M COMPANY	88579Y101	100.00	11/15/94	02/05/13	\$ 10,172.80	\$ 2,779.48 <sup>a</sup>	\$ 0.00	\$ 7,393.32
Security Subtotal				\$	\$ 20,345.59	\$ 5,558.96	\$ 0.00	\$ 14,786.63
Total Long-Term (Transactions are not reported on Form 1099-B or to the IRS)				\$	\$ 705,427.13	\$ 555,935.34	\$ 0.00	\$ 149,491.79
Total Long-Term				\$	\$ 705,427.13	\$ 555,935.34	\$ 0.00	\$ 149,491.79

**YEAR-END SUMMARY INFORMATION IS NOT PROVIDED TO THE IRS.**

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Date Prepared: February 7, 2014

**Realized Gain or (Loss) Summary**

**Total Realized Gain or (Loss)**

Description	Total Proceeds	Cost Basis	Wash Sale Loss Disallowed	Realized Gain or (Loss)
<b>Total Short-Term Realized Gain or (Loss) (Cost basis is reported to the IRS. Report on Form 8949, Part I, with Box A checked.)</b>	\$ 50,402.75 \$	47,300.53 \$	0.00 \$	3,102.22
<b>Total Short-Term Realized Gain or (Loss)</b>	\$ 50,402.75 \$	47,300.53 \$	0.00 \$	3,102.22
<b>Total Long-Term Realized Gain or (Loss) (Transactions are not reported on Form 1099-B or to the IRS. Report on Form 8949, Part II with Box C checked.)</b>	\$ 705,427.13 \$	555,935.34 \$	0.00 \$	149,491.79
<b>Total Long-Term Realized Gain or (Loss)</b>	\$ 705,427.13 \$	555,935.34 \$	0.00 \$	149,491.79
<b>TOTAL REALIZED GAIN OR (LOSS)</b>	\$ 755,829.88 \$	603,235.87 \$	0.00 \$	152,594.01

- 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	
<b>Type or print</b> Name of exempt organization or other filer, see instructions <b>KBR FOUNDATION, INC.</b>	Employer identification number (EIN) or <b>52-1772480</b>
Number, street, and room or suite no. If a P.O. box, see instructions. <b>7012 PORTMARNOCK PLACE</b>	Social security number (SSN)
City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>BRADENTON, FL 34202</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-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.**

**JOSEPH P. BORNSTEIN**

- The books are in the care of **7012 PORTMARNOCK PLACE - BRADENTON, FL 34202**

Telephone No **941 907-1268**

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

**TAXPAYER REQUIRES ADDITIONAL TIME TO GATHER INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN.**

8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a	\$	0.
8b 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	\$	0.
8c <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 **CPA**

Date

Form 8868 (Rev 1-2014)