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Form **990-PF** Department of the Treasury Internal Revenue Service

For calendar year 2013 or tax year beginning

**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. , and ending

OMB No 1545-0052

Name of foundation						A Employer identificatio	n number		
MICHAEL J & PATRICIA K BATZA FOUNDATION						52-1853565	•		
							300	B Telephone number 410-769-61	0.0
_		iwn, state or province, country, and		reign n	netal code		500	C If exemption application is a	
		SON, MD 21286	u ZII 01 II	n eigii þi	usiai code			if exemption application is p	bending, check here
_		all that apply: Initial re	eturn		Initial return of a fo	rmer public o	charity	D 1 Foreign organization	s, check here
		Final ret	turn		Amended return	•	•		
		Address	s change		Name change			2 Foreign organizations m check here and attach c	eeting the 85% test, omputation
H C	heck	type of organization: X Sec	ction 501(	c)(3) ex	empt private foundation			E If private foundation sta	itus was terminated
		ction 4947(a)(1) nonexempt charit			Other taxable private founda	tion		under section 507(b)(1	
I Fa	ır ma	rket value of all assets at end of ye	ar J A		ng method: X Cash	L Accr	ual	F If the foundation is in a	60-month termination
		Part II, col. (c), line 16)	.   . !		her (specify)			under section 507(b)(1	)(B), check here
<b>D</b>		1,096,58. Analysis of Revenue and Expen		i, colui	mn (d) must be on cash b				(d) - ·
LPa	<u>rt l</u>	(The total of amounts in columns (b), (c necessarily equal the amounts in column	s), and (d) m	ay not	(a) Revenue and expenses per books		ivestment ome	(c) Adjusted net income	(d) Disbursements for charitable purposes
	1	Contributions, gifts, grants, etc., re			150,259.		-	N/A	(cash basis only)
	2	Check If the foundation is not requ		ich R	130,237.			11/11	
	3	Interest on savings and temporary cash investments	nou to attacil i	ט וויסי					
	4	Dividends and interest from secur	rities		5,483.		5,483.		STATEMENT 1
	5a	Gross rents							
	b	Net rental income or (loss)							
ø.	6a	Net gain or (loss) from sale of assets not	t on line 10		105,461.				
Ž	Ь	Gross sales price for all assets on line 6a	75,15	52.					,
Revenue	7 Capital gain net income (from Part IV, line 2)					10	5,461.		
Ξ	8 Net short-term capital gain								
	9	Income-modifications Gross sales less returns	ŧ						
	10a	and allowances	1						
	11 1	tess Cost of goods sold	<u>k</u>						-
	Õć	Gross profit or (loss) 014	2		12.		12.		STATEMENT 2
	113	Total. Add lines_1-through-11-	И		261,215.	11	0,956.		STATEMENT Z
	13	Compensation of officers, directors, trus	otoco etc		201,213.		0.		0.
	H H	Other employee salaries and wage		,	<del>-</del>				<del>                                     </del>
		Pension plans, employee benefits							<u></u>
ses	ı	Legal fees							
penses	l .	_	STMT	3	2,000.		0.		2,000.
	C	Other professional fees	STMT	4	3,879.		3,879.		0.
ive	17	Interest							
Operating and Administrative Ex	18		STMT	5	79.		79.		0.
inis	19	Depreciation and depletion							
<del>p</del>	20	Occupancy							
٧Þ	21	Travel, conferences, and meetings	S						
au	22	Printing and publications	STMT	6	280.		0.		280.
ting	23 24	Other expenses  Total operating and administrati		O	200.		<u> </u>		200.
era	24	expenses. Add lines 13 through 2			6,238.		3,958.		2,280.
o	25	Contributions, gifts, grants paid	LU		48,900.	<del></del>	<del></del>		48,900.
		Total expenses and disbursemen	nts.		=0,5000				+
	_	Add lines 24 and 25			55,138.		3,958.		51,180.
	27	Subtract line 26 from line 12:					·		
		Excess of revenue over expenses and d	lisbursemer	nts	206,077.			<u></u>	
	Ь	Net investment income (if negative	e, enter -0-)			10	6,998.		
2025		Adjusted net income (if negative, en	nter -0-)	_				N/A	

4

1,194,739.

Form **990-PF** (2013)

4 Add lines 1, 2, and 3

3 Other increases not included in line 2 (itemize)

6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

5 Decreases not included in line 2 (itemize)

		nd(s) of property sold (e.g.		Income	[(Б)]	How ac	quired (c	) Date acquire	ed	(d) Date sold
2-story brick wateriouse, of Common Stock, 200 Sits. MEC Co.)					D D	- Purci - Dona	ition	(mo., day, yr.	)	(mó., day, yr.)
h BROWN VENTURE INVESTORS LP, SERIES 2000-A								ARIOUS		VARIOUS
6 CAPITAL GAINS			RIES 2	000-A		-	P			
d d	<u></u>	DHNDO		<u>-</u>	<del>  -</del> -		- l			<del></del>
е										
(e) Gross sales price	(f)	Depreciation allowed (or allowable)		st or other basis expense of sale				(h) Gain or (e) plus (f) m		g)
a 373,248.				269,69	1.					103,557.
b 175. c 1,729.	<u> </u>	-		<del> </del>		-	<del>.</del>			175. 1,729.
d 1,729.				•						1,745.
e							•			
Complete only for assets showing	ng gain in	column (h) and owned by t	the foundation	on 12/31/69			(I) G	ains (Col. (h)	gain	minus
(i) F.M.V. as of 12/31/69		(j) Adjusted basis as of 12/31/69		cess of col. (i) col. (j), if any		•	COI. (K	t), but not les Losses (from	s thar col. (	h))
a										103,557.
<u>b</u>										175. 1,729.
- d										1,729.
e										
2 Capital gain net income or (net ca	ipital loss	If gain, also enter If (loss), enter -0			}	2		·		105,461.
3 Net short-term capital gain or (los	ss) as def									
If gain, also enter in Part I, line 8,	column (	` ,	· ,		}			33	T / B	
If (loss), enter -0- in Part I, line 8  Part V   Qualification U		Section 4940(e) for	Reduced	Tay on Net	Inv	3 estn	ent Inco		I/A	
If section 4940(d)(2) applies, leave to  Was the foundation liable for the sectif "Yes," the foundation does not quate to the section of the	tion 4942 lify under	tax on the distributable am section 4940(e). Do not co	mplete this pa	ırt.		3.				Yes X No
(a) Base period years	,	(b) Adjusted qualifying dis	tributions	Net value of no	(c)	) ritable-	uea secate	(5-1-4)	Distrib	(d) oution ratio
Calendar year (or tax year beginni 2012	ng in)	, , , ,	8,320.	Not value of the	лина		7,079.	(col. (b) divided by col. (c))  • 067260		
2012	-		4,868.		<u> </u>		0,102.			
2010		57	7,310.			,03	4,319.			.558155
2009			9,845.				0,943.			.085546
2008		8	1,125.		1	<u>,73</u>	5,250.			.046751
2 Total of line 1, column (d)	e l.		b 0 b 5	and here the account of				2		.835857
3 Average distribution ratio for the the foundation has been in existe	•	•	on line 2 by 5,	or by the number	гогує	ars		3		.167171
4 Enter the net value of noncharital	ble-use as	sets for 2013 from Part X,	line 5					4		990,596.
5 Multiply line 4 by line 3					5		165,599.			
6 Enter 1% of net investment incor	ne (1% o	f Part I, line 27b)						6		1,070.
7 Add lines 5 and 6								7	·	166,669.
8 Enter qualifying distributions from		•	. 4L	-1-4- 4b4		0/ +-		8		51,180.
If line 8 is equal to or greater that See the Part VI instructions.	n line 7, c	neck the box in Part VI, line	e ib, and comp	piete that part usir	ıg a 1	% tax				

1a Exempt operating foundations described in section 4940(d)(2), chask here ▶ □ and enter *NA* on live 1.  Date of fulling or determination letter: disach copy of letter if necessary-see instructions)  Domestic foundations that meel the section 4940(e) requirements in Part V, check here ▶ □ and others 1%  of Part I, Inia 27.  of Part I, Inia 27.  and of the 1% of Content of the Content of Part I, Inia 12, cot. (b).  2 Tax warder section 511 (demestic section 4947(a)(1) frusts and taxable foundations only. Others enter -0-)  3 3 2, 140.  5 Add lines 1 and the investment income. Subtract line 4 from line 3. If zero or less, enter -0-  5 Tax based on Investment income. Subtract line 4 from line 3. If zero or less, enter -0-  5 Tax based on the subtraction of the form line 3. If zero or less, enter -0-  5 Tax based on publication for extension of the 10 lite (Form 1988)  6 Exploration of the publication for extension of the 10 lite (Form 1988)  6 Backup withholding arroneously withhold  7 Total credits and payments. Add lines 6 through 6d  8 Backup withholding arroneously withhold  7 Total credits and payments. Add lines 6 through 6d  8 Backup withholding arroneously withhold  8 Tax but in the total of lines 5 and 8 is more finan line 7, enter amount owed  9 Tax but in the total of lines 5 and 8 is more finan line 7, enter amount owed  9 Tax but in the total of lines 5 and 8 is more finan line 7, enter amount owed  1 Enter the amount of line 10 to be Credited to 2014 estimated tax ▶ 1, 60.4. Refunded ▶ 10  1, 60.4. Refunded ▶ 11  1 Enter the amount of line 10 to be Credited to 2014 estimated in the control of the control of the 10 to be Credited to 2014 estimated in the control of the 10 to be Credited to 2014 estimated in the control of the 10 to be Credited to 2014 estimated in the lines of the control of the 10 to be Credited to 2014 estimated in the lines of the control of the 10 to be Credited to 2014 estimated in the lines of the control of the 10 to be Credited to 2014 estimated in the lines of the control		n 990-PF (2013) MICHAEL J & PATRICIA K BATZA FOUNDATION 52-1853 art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see in			Page 4
Dates of ruling or determination letter: (attach copy of letter if accessary-se instructions)   1					
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here					
or Part I, line 27b.  All Other dimensities foundations enter 27k of line 27b, Exempt foreign organizations enter 4% of Part I, line 12, col. (b).  Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  Add lines 1 and 2  2 0.  3 0.  3 Add lines 1 and 2  2 1. 40.  5 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. It zero or less, enter -0-  5 Tax based on investment income. Subtract line 4 from line 3. It zero or less, enter -0-  5 Tax based on investment income. Subtract line 4 from line 3. It zero or less, enter -0-  5 Tax based on investment income. Subtract line 4 from line 3. It zero or less, enter -0-  6 Backup without or subtraction or subtraction of the 2013  8 Based programments and 2012 overpayment credited to 2013  8 Based programments and 2012 overpayment credited to 2013  8 Based programments and 2012 overpayment enter or line 6 from 8868)  6 Based programments and 2012 overpayment enter or line 6 from 8868)  6 Enter any penalty for underpayment of estimated tax. Check here   If Form 2220 is attached  7 Total credits and payments. Add lines 6 and 6, line 19 review and or line 10 to line 19 review and 19 review a	b			2.1	40.
2 Tax under section 511 (damestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 Add lines 1 and 2 3 2,140.  Add lines 1 and 2 3 2,140.  Subtilité A (notione) bax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Ceredits/Payments: 2 2013 setimated tax payments and 2012 overpayment credited to 2013 6	_				
2 Tax under section 511 (damestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 Add lines 1 and 2 3 2,140.  Add lines 1 and 2 3 2,140.  Subtilité A (notione) bax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Ceredits/Payments: 2 2013 setimated tax payments and 2012 overpayment credited to 2013 6	c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
3 2,140.  Subtite A (nome) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter-0-)  Subtite A (nome) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter-0-)  Tax based on investment income. Subtract line 4 from line 3. If zaro or less, enter-0-  Tax based on investment income. Subtract line 4 from line 3. If zaro or less, enter-0-  Tax based and tax payments and 2012 overpayment credited to 2013  Exempt foreign organizations—tax withheld at source  Tax pard with application for exclosions of time to file (form 8868)  Beauty withholding erroneously withheld  Total credits and payments. Add lines 6a through 6d  Enter any penalty for undeppyment of estimated tax. Check here ☐ if Form 2220 is attached  Total credits and payments. Add lines 6a through 6d  Enter any penalty for undeppyment of estimated tax. Check here ☐ if Form 2220 is attached  Total credits and payments. Add lines 6a through 6d  Enter any penalty for undeppyment of estimated tax. Check here ☐ if Form 2220 is attached  Total credits and payments. Add lines 6a through 6d  Enter any penalty for undeppyment of estimated tax. Check here ☐ if Form 2220 is attached  Total credits and payments. Add lines 6a through 6d  Enter any penalty for undeppyment of estimated tax. Check here ☐ if Form 2220 is attached  Total credits and payments. Add lines 6a through 6d  Enter the amount of line 10 to be. Gredited to 2014 estimated tax. Discovery and the company of the control of the 10 to 2014 estimated tax. Discovery and the amount of line 10 to be. Gredited to 2014 estimated tax. Discovery and the activates and copies of any materials published or distributed by the foundation and connection with the activities.  To any political campaign?  To the foundation, I form 10 to the year?  In the answer is "Yes" to 1 <sub>4</sub> or 1 <sub>10</sub> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation or connection with the activities.  To be first the rembusion f		)		~	0.
4 Subtitle A (mocme) bat (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-				2,1	
5 1 ax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-6 CreditsPyments;  a 2013 estimated tax payments and 2012 overpayment credited to 2013 b Exempt foreign organizations - tax withhold at source a Tax pand with application for oxidension of time to the (Form 8868) d Backup withholding erroneously withhold f Total credits and payments. Add lines 6a through 6d d Enter any peasity for underpayment of estimated tax. Check here if Form 2220 is attached f Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owned f Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the fold of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the fold of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the fold of lines 5 and 8, enter the amount overpaid f Overpayment. If line 7 is more than the fold of 10 is 10	4		-		
6 Credits/Payments: a 2013 estimated tax payments and 2012 overpayment credited to 2013 b Exempt to regin organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8668) d 3,000. d 8c 1 3,				2,1	
b Exempt foreign or ganazations - fax withheld at source 6 Tax paid with application for extension of time to file (Form 8868) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Tax adve. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Oredited to 2014 estimated tax ▶ 1, 604. Refunded ▶ 11 0, 604.  Part VIIA   Statements Regarding Activities 1 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervere in any political campagn? 1 Dut 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 1 <sub>8</sub> or 1 <sub>9</sub> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. 1 Dut 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 1 <sub>8</sub> or 1 <sub>9</sub> , attach a detailed description of the activities. 1 Dut it foundation the Form 1120-POL for this year? 2 Enter the remburisement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0. € 2 Exist the cumbation making and virtues that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities. 3 Has the foundation making and virtue that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities. 3 Has the foundation making and the properties of the year?  If "Yes," attach a detailed description of the activities.  If Yes is a fill deal as return on Form 990-T fine year?  If "Ye		· · · · · · · · · · · · · · · · · · ·			
b Exempt foreign or ganazations - fax withheld at source 6 Tax paid with application for extension of time to file (Form 8868) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Tax adve. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Oredited to 2014 estimated tax ▶ 1, 604. Refunded ▶ 11 0, 604.  Part VIIA   Statements Regarding Activities 1 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervere in any political campagn? 1 Dut 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 1 <sub>8</sub> or 1 <sub>9</sub> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. 1 Dut 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 1 <sub>8</sub> or 1 <sub>9</sub> , attach a detailed description of the activities. 1 Dut it foundation the Form 1120-POL for this year? 2 Enter the remburisement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0. € 2 Exist the cumbation making and virtues that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities. 3 Has the foundation making and virtue that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities. 3 Has the foundation making and the properties of the year?  If "Yes," attach a detailed description of the activities.  If Yes is a fill deal as return on Form 990-T fine year?  If "Ye	а	a 2013 estimated tax payments and 2012 overpayment credited to 2013 6a 744.			
d Backup withholding stroneously withheld 7 Total credits and payments. Add hims 6a through 60 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than hine 7, enter amount owed 9 ☐ Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Gredited to 2014 estimated tax ▶ 1, 604. Refunded ☐ 11 ☐ 0.  Part VII-A ☐ Statements Regarding Activities 1 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? 1 Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 1 If the answer is 'Yes' to 1 <sub>2</sub> or 1 <sub>0</sub> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. 2 Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 1 If the answer is 'Yes' to 1 <sub>2</sub> or 1 <sub>0</sub> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. 3 Did the foundation file Form 1120-P0L for this year? 4 If On the foundation   S					
7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of semanted tax. Check here	C	Tax paid with application for extension of time to file (Form 8868)  6c 3,000.			
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be; Credited to 2014 estimated tax ▶ 1, 604					1
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be; Credited to 2014 estimated tax ▶ 1, 6 0 4	7	Total credits and payments. Add lines 6a through 6d		3,7	44.
Statements   St	8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here if Form 2220 is attached 8			
11 Enter the amount of line 10 to be; Credited to 2014 estimated tax ▶ 1, 60 4 • Refunded ▶ 11 0.9  Part VII-A   Statements Regarding Activities  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?  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 10 or 10, 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?  c Did the foundation file Form 1120-POL for this year?  c 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 remibursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0 .  2 Has the foundation mapaged in any activities that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities.  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  4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  If "Yes," attach the statement required by General Instruction T.  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, or  • By state legislation that effectively amends the governing instrument so that no mandatory directions		<del> </del>			
11 Enter the amount of line 10 to be; Credited to 2014 estimated tax ▶ 1, 60 4 • Refunded ▶ 11 0.9  Part VII-A   Statements Regarding Activities  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?  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 10 or 10, 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?  c Did the foundation file Form 1120-POL for this year?  c 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 remibursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0 .  2 Has the foundation mapaged in any activities that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities.  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  4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  If "Yes," attach the statement required by General Instruction T.  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, or  • By state legislation that effectively amends the governing instrument so that no mandatory directions	10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		1,6	04.
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If the answer is "Yes" to 1 <sub>18</sub> or 1 <sub>1b</sub> , 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 [le Form 1120-PQL for this year?  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?  2 If "Yes," attach a detailed description of the activities.  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  4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  4b 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.  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, 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.  • By language in the governing instrument of the portal process of the states to which the foundation reports or with which it is registered (see instructions)  • By the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3		any political campaign?	1a		X
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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?  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  To 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  To 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  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  By It "Yes," complete Part XIV  By X  Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses  10	5		5		X
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	10		-		
	10			-PF	

	990-PF (2013) MICHAEL J & PATRICIA K BATZA FOUNDATION 52-185.	<u>3565</u>		Page 5
	rt 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		<u> </u>
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		<u> </u>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
	Website address ► N/A			
14	The books are in care of ► THE FOUNDATION Telephone no. ► 410-7		<u> 100</u>	
	Located at ► 501 FAIRMOUNT AVENUE, TOWSON, MD ZIP+4 ►2:	L286		
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	N	/A	
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign			
	country			
Pa	rt 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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person? Yes X No			,
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			ı
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X 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)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"			1
	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.)			
b	If any answer is "Yes" to 1a(1)-(6), did <b>any</b> 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)? N/A	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		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	1		
	before 2013?	-		
	If "Yes," list the years , , , , , , , , , , , , , , , , , , ,			,
t	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	<u> </u>		
	statement - see instructions.)  N/A	2b		
C	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.			
_	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
38				
	• •			
t	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.)  N/A	3b		X
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	<del> </del>	
t	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	1 1		v
	had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	) DE	(2012)
	F	orm <b>99</b>	U-77	(2013)

Form 990-PF (2013) MICHAEL J & PATRICIA K			<u>52-18535</u>	<u>65</u>	Page 6
Part VII-B   Statements Regarding Activities for Which	Form 4720 May Be	Required (contin	ued)		
5a During the year did the foundation pay or incur any amount to:					
(1) Carry on propaganda, or otherwise attempt to influence legislation (secti	on 4945(e))?	Y	es X No		
<ol><li>Influence the outcome of any specific public election (see section 4955);</li></ol>	or to carry on, directly or indir	ectly,			
any voter registration drive?		Y	es X No		
(3) Provide a grant to an individual for travel, study, or other similar purpose	Y	es X No			
(4) Provide a grant to an organization other than a charitable, etc., organizat	ion described in section				
509(a)(1), (2), or (3), or section 4940(d)(2)?		Y	es X No	- 1	
(5) Provide for any purpose other than religious, charitable, scientific, literar	y, or educational purposes, or	for		ļ	ŀ
the prevention of cruelty to children or animals?			es X No	Ì	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify u	nder the exceptions described	ın Regulations			
section 53.4945 or in a current notice regarding disaster assistance (see inst		•	N/A	5b	
Organizations relying on a current notice regarding disaster assistance check	here		▶□ □		<u> </u>
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption		ined			į
expenditure responsibility for the grant?			es 🔲 No		İ
If "Yes," attach the statement required by Regulations section 53 49					
6a Did the foundation, during the year, receive any funds, directly or indirectly, t					
a personal benefit contract?	- p, p		es X No		
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a	nersonal benefit contract?			6Ь	x
If "Yes" to 6b, file Form 8870.	pordonal bonom contider		<u> </u>	+-	<del></del>
7a At any time during the tax year, was the foundation a party to a prohibited tax	shelter transaction?		es X No		
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attri		<u> </u>	/-	7b	<del></del>
Part VIII Information About Officers, Directors, Trus		nagers. Highly		<del></del>	
Paid Employees, and Contractors			•		
1 List all officers, directors, trustees, foundation managers and the	ir compensation.				
( ) Normand add and	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e)	Expense unt, other
(a) Name and address	to position	(If not paid, enter -0-)	and deferred compensation	allo	owances
PATRICIA K. BATZA	OFFICER				
501 FAIRMOUNT AVENUE	7				
TOWSON, MD 21286	0.00	0.	0.		0.
MICHAEL J. BATZA	OFFICER				
501 FAIRMOUNT AVENUE	7				
TOWSON, MD 21286	0.00	0.	0.		0.
MAUREEN B. MORRIS	OFFICER				
501 FAIRMOUNT AVENUE	7				
TOWSON, MD 21286	0.00	0.	0.		0.
MICHELLE B. RAILEY	OFFICER				
501 FAIRMOUNT AVENUE	7				
TOWSON, MD 21286	0.00	0.	0.		0.
2 Compensation of five highest-paid employees (other than those in		enter "NONE."			
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e)	Expense unt, other
	hours per week devoted to position	(C) compensation	and deferred compensation		owances
NONE					
	4				
			ļ		
	4				
		ļ			
	4				
<del></del>	$\dashv$				
Total number of other employees paid over \$50,000	<u> </u>	1	<del> </del>	L	<u></u>
TOTAL MODULE OF DIDEL EMONOVERS DAIN OVER NAUTURE					1.1

Total. Add lines 1 through 3	<b>•</b>	· · · · · · · · · · · · · · · · · · ·	0.
All other program-related investments. See instructions.			
2			
1 N/A			
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount	
Part IX-B Summary of Program-Related Investments			
4			
3			
2			0.
ORGANIZATIONS THAT ARE INVOLVED IN DIRECT CHARITABLE ACTIVITES. SEE ATTACHED LISTING.			^
1 THE FOUNDATION MAKES GRANTS TO QUALIFYING 501(C)(3)			
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	
Total number of others receiving over \$50,000 for professional services  Part IX-A   Summary of Direct Charitable Activities		<u> </u>	0
NONE			
(a) Name and address of each person paid more than \$50,000 (b) Type of s  NONE	ervice	(c) Compens	ation
3 Five highest-paid independent contractors for professional services. If none, enter "NONE."			
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Hig Paid Employees, and Contractors (continued)	hly		
FORM 990-PF (2013) MICHAEL J & PATRICIA K BATZA FOUNDATION		353565 Pa	ge 7

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations	, see instructions )
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
-	Average monthly fair market value of securities	1a	203,054.
	Average of monthly cash balances	1b	83,321.
	Fair market value of all other assets	1c	719,306.
d	Total (add lines 1a, b, and c)	1d	1,005,681.
е	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	1,005,681.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	15,085.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	990,596.
6	Minimum investment return. Enter 5% of line 5	6	49,530.
E	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations an	d certain	
_	foreign organizations check here   and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	49,530.
2a	· · · · · · · · · · · · · · · · · · ·		
b	L = 1		
C	Add lines 2a and 2b	2c	2,140.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	47,390.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	47,390.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	47,390.
L	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	51,180. 0.
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:		
а	Surtability 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	51,180.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	51,180.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years.	jualifies fo	or the section

Form **990-PF** (2013)

### Part XIII Undistributed Income (see instructions)

	<b>(a)</b> Corpus	(b) Years prior to 2012	(c) 2012	<b>(d)</b> 2013
Distributable amount for 2013 from Part XI, line 7			10.4	47,390.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
<b>b</b> Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:		<del></del>		
<b>a</b> From 2008				
<b>b</b> From 2009 50,204.				
c From 2010 528,754.				
dFrom 2011 24,025.				
eFrom 2012 15,160.	640 440			
f Total of lines 3a through e	618,143.			
4 Qualifying distributions for 2013 from				
Part XII, line 4: ►\$ 51,180.			•	
a Applied to 2012, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior		0		
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	_			
(Election required - see instructions)	0.			47 200
d Applied to 2013 distributable amount	3,790.			47,390.
e Remaining amount distributed out of corpus	3,790.			0.
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			<u> </u>
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	621,933.			
<b>b</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.		
<b>d</b> Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2012. Subtract line				··-· , ,
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2014				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008	_			
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014	601 000			
Subtract lines 7 and 8 from line 6a	621,933.			
10 Analysis of line 9:				
a Excess from 2009 50,204. b Excess from 2010 528,754.				
e Excess from 2013 3,790.			<u> </u>	<u> </u>

Form 990-PF (2013) MICHAEL	J & PATRIC	IA K BATZA	FOUNDATION	52-185	53565 Page 10
Part XIV   Private Operating F	oundations (see ins	structions and Part VII	-A, question 9)	N/A	
1 a If the foundation has received a ruling of	r determination letter that	it is a private operating			
foundation, and the ruling is effective fo	r 2013, enter the date of t	he ruling	▶		
<b>b</b> Check box to indicate whether the found	dation is a private operatir	ng foundation described i	n section	4942(j)(3) or 494	12(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
investment return from Part X for	<del></del>		<u> </u>	<del> </del>	
each year listed	]				
b 85% of line 2a				<del>                                     </del>	
c Qualifying distributions from Part XII,	<del></del>			<del> </del>	<del></del>
line 4 for each year listed		ļ			
•		<del></del>		<del> </del>	
d Amounts included in line 2c not					
used directly for active conduct of	}				
exempt activities			<del> </del>		
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>b</b> "Endowment" alternative test - enter				<del> </del>	
2/3 of minimum investment return					
shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter:	·		<del> </del>	<del>-  </del>	
(1) Total support other than gross					
investment income (interest,					
dividends, rents, payments on					
securities loans (section		ļ	ļ		
512(a)(5)), or royalties)				<del>                                     </del>	
(2) Support from general public and 5 or more exempt					
organizations as provided in					
section 4942(j)(3)(B)(III)			<u></u>		
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income	<u></u>	<u> </u>			
Part XV Supplementary Info			if the foundation	n had \$5,000 or mo	re in assets
at any time during		ructions.)			
1 Information Regarding Foundation	-				
a List any managers of the foundation wh			ributions received by the	foundation before the close	e of any tax
year (but only if they have contributed r	nore than \$5,000). (See s	ection 507(d)(2).)			
NONE					
b List any managers of the foundation wh			(or an equally large port	on of the ownership of a pai	rtnership or
other entity) of which the foundation ha	s a 10% or greater interes	st			
NONE					
2 Information Regarding Contribut	ion, Grant, Gift, Loan	, Scholarship, etc., Pr	rograms:	<del></del>	
Check here <b>X</b> if the foundation of	only makes contributions	to preselected charitable	organizations and does	not accept unsolicited reque	ests for funds. If
the foundation makes gifts, grants, etc.	(see instructions) to indiv	/iduals or organizations u	inder other conditions, c	omplete items 2a, b, c, and	d.
a The name, address, and telephone num	ber or e-mail address of t	the person to whom appli	cations should be addre	ssed:	
, , , ,					
				, <del></del>	
<b>b</b> The form in which applications should	oe submitted and informa	tion and materials they sl	nould include:		
c Any submission deadlines:			<u>_</u> _		
d Any restrictions or limitations on award	ls, such as by geographic	al areas, charitable fields.	kinds of institutions, or	other factors:	
,	,	,		· · · · · · ·	

Total

**▶** 3b

Form **990-PF** (2013)

Form 990-PF (2013) MIC

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

323621 10-10-13

Enter gross amounts unless otherwise indicated.	Unrelated b	usiness income		oy section 512, 513, or 514	(e)
1 Program service revenue:	(a) Business code	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income
a					
<u> </u>	- <del>                                    </del>				***
С					
d			<del>-  </del>		
e	_				· <del>-</del>
f	<del></del>				
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	5,483.	
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			14	12.	
8 Gain or (loss) from sales of assets other than inventory			18	105,461.	"
9 Net income or (loss) from special events					
O Gross profit or (loss) from sales of inventory					•
11 Other revenue:					
a	_				
b	_				
C	_				
d	_	·			
e	_			110 055	
12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e)			0.	110,956.	110,95

Part XV	I-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).
<del></del>	<u> </u>
-	

Form 99	0-PF (20	) 013)MICHA	EL J & PA	ATRICIA	. K BATZA FOU	NDATION	52-18	53565	Pa	age 13
Part	XVII	Information Re Exempt Organ		nsfers To a	and Transactions	and Relations	ships With Nonc	haritable		
1 Did	the ord			of the followin	ig with any other organizati	on described in sec	tion 501(c) of		Yes	No
					27, relating to political organ					1
		from the reporting found								
	) Cash	., .			<b>9</b>			1a(1)		x
•	) Other	assets						1a(2)		X
		sactions:								
(1)	) Sales	of assets to a noncharita	ble exempt organiz	ation				1b(1)		X
(2	) Purch	ases of assets from a no	ncharitable exempt	organization				1b(2)		X
(3)	) Renta	l of facilities, equipment,	or other assets					1b(3)		X
(4)	) Reimt	oursement arrangements						1b(4)		X
(5)	) Loans	or loan guarantees						1b(5)		X
(6)	) Perfoi	mance of services or me	embership or fundra	aising solicitatio	ons			1b(6)		X
c Sh	aring of	facilities, equipment, ma	uling lists, other ass	sets, or paid em	ployees			10		X
<b>d</b> If t	he ansv	ver to any of the above is	"Yes," complete the	e following sche	edule. Column (b) should al	ways show the fair	market value of the good	ds, other ass	ets,	
					ed less than fair market val	ue in any transactio	n or sharing arrangemer	it, show in		
	<del>_ · ·</del>	) the value of the goods,								
(a)Line r	30	(b) Amount involved	(c) Name (		e exempt organization	(d) Description	n of transfers, transactions,	and sharing an	rangeme	ents
				N/A						
		<del> </del>	· 							
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									_	
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				<u> </u>	<del> </del>					
	+						<del></del>			
		···					<del></del>			
	+									
	+									
						-				
<b>2a</b> Is	the four	ndation directly or indirec	tly affiliated with, or	r related to, one	or more tax-exempt organ	zations described				
		501(c) of the Code (othe	-					Yes	X	☐ No
		omplete the following sch		<i>/、 //</i>						
		(a) Name of org	ganization		(b) Type of organization		(c) Description of relati	onship		
		N/A								
						ļ				
		$\overline{}$								
Sign Here	and be	elief his true, correct, and co	mplete Declaration		ng accompanying schedules and in taxpayer) is based on all infor	OFFIC	er has any knowledge	May the IRS of return with the shown below Yes	e prepar (see ins	rer
	Sign	eture of officer or trustee		Droposos's s	Date /	Title	Check   if PT	IN	_	
		Print/Type preparel s n	allie	Preparer's s		Date	Check if PT self- employed	IIA		
Paid		LISA STRON		L L	M. Stong	07/31/14	I	01011		! !
Prep Use		Firm's name ►MIS	TER, BUR	TON & F	RENCH, LLC		Firm's EIN ► 26 -	-25743	03	

Firm's address ► 307 INTERNATIONAL CIR, #570

HUNT VALLEY, MD 21031

### Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service **Schedule of Contributors** 

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
 ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www irs.qov/form990 ·

2013

OMB No 1545-0047

Name of the organization

**Employer identification number** 

52-1853565 MICHAEL J & PATRICIA K BATZA FOUNDATION Organization type (check one) Filers of: Section: Form 990 or 990-EZ J 501(c)( ) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization Form 990-PF 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions **General Rule** For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II Special Rules For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III. ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, chantable, etc., contributions of \$5,000 or more during the year Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

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

Name of organization

Employer identification number

### MICHAEL J & PATRICIA K BATZA FOUNDATION

52-1853565

Part I	Contributors (see instructions). Use duplicate copies of Part I	of additional space is needed	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	MICHAEL J. BATZA  520 E. SEMINARY AVENUE  TOWSON, MD 21286	\$10,259.	Person Payroll Noncash X (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	MICHAEL J. BATZA  520 E. SEMINARY AVENUE  TOWSON, MD 21286	\$140,000.	Person X Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		 	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
323452 10-2	4-13	\$Schedule B (Form	Person Payroll Noncash (Complete Part II for noncash contributions) 990, 990-EZ, or 990-PF) (2013)

Employer identification number

### MICHAEL J & PATRICIA K BATZA FOUNDATION

52-1853565

Part II	Noncash Property (see instructions). Use duplicate copies of Part II	ıf addıtıonal space ıs needed	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	MARKETABLE SECURITIES (SEE LISTING ATTACHED) COST BASIS OF \$10,259		05/01/13
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		   \$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
323453 10-24	1.12	Schedule B /Form 9	90, 990-EZ, or 990-PF) (2013

Schedule B (Form 990, 990-EZ, or 990-PF) (2013) Page 4 Name of organization Employer identification number the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) > \$ Use duplicate copies of Part III if additional space is needed (a) No. from Part I (b) Purpose of gift (c) Use of gift (d) Description of how gift is held (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from Part I (b) Purpose of gift (c) Use of gift (d) Description of how gift is held (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held

Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

Michael J. 7 Patricia K. Batza Foundation, Inc. 2013 List of NonCash Contributions from Michael J Batza

Date Received	Description	Shares	FMV
05/01/13	Nortel Networks Corp	150 00	1 58
05/01/13	Nuance Communications Inc	3,051.00	58,091 04
05/01/13	SWK Holdings Corp	29 00	23 20
05/01/13	Cisco Systems Inc	326.00	6,819.92
05/01/13	Tellabs Inc	439 00	908.73
05/01/13	Broadcom Corp	211 00	7,596 00
05/01/13	Monster Worldwide Inc	361.00	1,581 18
			75,021.65

### charles SCHWAB

Schwab One® Account of BATZA FAMILY FOUNDATION INC

Account Number \$ 4728-2115

Statement Period December 1-31, 2013

	This Period	poi	Year to Date	Date
Income Summary	Federally Tax-Exempt	Federally Taxable	Federally Tax-Exempt	Federally Taxable
Money Funds Dividends	0.00	0.00	00'0	2.55
Cash Dividends	0.00	2,243.49	00 0	5,397 27
Total Capital Gains	0.00	1,073.71	0.00	1,723 11
Town because	100	07/18/5		

# Investment Detail - Cash and Money Market Funds [Sweep]

Cash			Market Value		% of Account Assets
Cash ेशहार ङेवडांग			70.39 70.39		<1%
Money Market Funds [Sweep]	Quantity	Market Price	Market Value	Current Yield	% of Account Assets
SCHWAB GOVT MONEY FUND: SWGXX	163,565.2900	1.0000	163,565.29	0.00%	%09
Total Money Market Frinds (Swap)			Transporta		
Total Sash & Novey Darket (Socop)			Tookeds (6)		2000

# Investment Detail - Mutual Funds

	;	Market	Market	% of Account	Average		Unrealized
Bond Funds	Quantity	Price	Value	Assets	Cost Basis	Cost Basis	Gain or (Loss)
DOUBLELINE TOTAL RETURN	605.2840	10.7800	6,524.96	2%	11 00	6,622.45	(97.49)
BD FD CL I							
SYMBOL: DBLTX							

### charles SCHWAB

Schwab One® Account of BATZA FAMILY FOUNDATION INC

Account Number Stateme 4728-2115 Decen

Statement Period December 1-31, 2013

Investment Detail - Mutual Funds (continued)

Bond Funds (continued)	Quantity	Market Price	Market Value	% of Account Assets	Average Cost Basis	Cost Basis	Unrealized Gain or (Loss)
TEMPLETON GLOBAL BOND FUND ADV CL SYMBOL: TGBAX	506.9010	13.0900	6,635 33	2%	12.98	6,510.94	124.39
VANGUARD INTERM TERM INVESTMENT GRADE ADMIRAL SHARE SYMBOL: VFIDX	724.4020	9.6700	7,004.97	3%	10.31	7,470.35	(465.38)
Town Bond Punck	000000000		20 (0426)	6.		THE STATE OF THE S	CONTRACTOR
Equity Funds	Quantity	Market Price	Market Value	% of Account Assets	Average Cost Basis	Cost Basis	Unrealized Gain or (Loss)
FIRST EAGLE GLOBAL FUND CL I SYMBOL: SGIIX	95.6430	53 8200	5,147 51	2%	53.57	5,103.43	44.08
HARBOR INTERNATIONAL FUND INST CL SYMBOL: HAINX	173.6870	71.0100	12,333 51	2%	38.79	6,624.22 a	5,709.29
IVY ASSET STRATEGY FUND CL I SYMBOL: IVAEX	84 2990	32 2800	2,721.17	×1×	28 77	2,425 29	295.88
PARAMETRIC TAX MGD EMRG MKTS INST SYMBOL: EITEX	197 8440	48.7900	9,652.81	4%	28 91	5,486.88 a	4,165 93
PIMCO COMMODITY REAL RETURN STRAT INST SYMBOL: PCRIX	688.3020	5.4900	3,778.78	1%	86 9	5,564.82 a	(1,786 04)

### Charles SCHWAB

Schwab One® Account of BATZA FAMILY FOUNDATION INC

**Account Number** 4728-2115

December 1-31, 2013 Statement Period

# Investment Detail - Mutual Funds (continued)

		Market	Market	% of Account	Average		Unrealized
Equity Funds (continued)	Quantity	Price	Value	Assets	Cost Basis	Cost Basis	Gain or (Loss)
RUSSELL GLOBAL INFRASTRUCTURE Y SYMBOL: RGIYX	321.5130	11 7800	3,787.42	1%	11 75	3,770.64	16.78
SCHRODER GLBL MULTI CAP EQTY FD INST SERV SYMBOL: SQQJX	1,179.2360	12.7800	15,070.64	<b>%9</b>	12 39	14,507.78	562.86
THIRD AVENUE REAL ESTATE VALUE FD INSTL SYMBOL: TAREX	91.9370	28 8200	2,649.62	×1%	16.54	1,839.84 8	809.78
VIRTUS PREMIUM ALPHASECTOR FD I SYMBOL: VAPIX	320.0940	16.5800	5,307.16	5%	15.51	4,925.33	381.83
ं अंत्रा इत्यावर नेप्रतिक	अं, क्षित्र जन्दर्ग		60/448/67	722%			(100 gall) (200 cm)
િસાંગીમકાલો વૈષ્ણવેલ	(YOUR IN THE PARTY OF THE PARTY		30,648,913	730			STATION STATION STATES

## **Investment Detail - Other Assets**

	Quantity	Quantity Market Price	Market Value	% of Account Assets	Unrealized Gain or (Loss)		
Other Assets	Units Purchased Cost Per Share	Cost Per Share	Cost Basis Acquired	Acquired		Holding Days	Holding Days Holding Period
ISHARES CORE S&P ETF	113.0000	185.6500	20,978.45	8%	10,507.88		
S&P 500 INDEX	113.0000	92.6599	10,470.57 a 06/19/09	06/19/09	10,507.88	1656	656 Long-Term
SYMBOL: IVV							,

### Charles SCHWAB INSTITUTIONAL

Schwab One® Account of BATZA FAMILY FOUNDATION INC

Account Number 4728-2115

Statement Period December 1-31, 2013

# Investment Detail - Other Assets (continued)

	Quantity	Market Price	Market Value	% of Account Assets	Unrealized Gain or (Loss)		,
Other Assets (continued)	Units Purchased Cost Per Share	Cost Per Share	Cost Basis Acquired	Acquired		Holding Days	Holding Days Holding Period
ISHARES CORE S&P ETF	76.0000	109.1300	8,293.88	3%	5,007.83		
SMALLCAP	76.0000	43.2375	3,286.05 a 04/29/09	04/29/09	5,007.83	1707	Long-Term
SYMBOL: IJR							
"इब्रेक्षा" एमिताः अध्यक्ष	1990018EU		\$0,000 to	<b>%</b> 7.0	地名的地名		
		Policii Coosi Bristis.	(13,743,62				

Total Investment Defail	2008/522/89
Total Account Salve	273,5221.33
ीलाको हैन्छा है। स्वरूप	44,346.30

FORM 990-PF	DIVIDENDS	AND INTER	EST FROM SEC	URITIES	STATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	REVENUE	NET INVEST	r- Adjusted
BROWN INVESTMENT ADVISORY BROWN VENTURE INVESTORS LP,	2.		0.	2.	2.
SERIES 2000-A CHARLES SCHWAB	8. 7,202.		0. 9. 5,47		
TO PART I, LINE 4	7,212.	1,72	9. 5,48	5,483	3.
FORM 990-PF		OTHER I	NCOME		STATEMENT 2
DESCRIPTION			(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	
CLASS ACTION PROCEED LITIGATION	DS - SECURI	TIES	12.	12	•
TOTAL TO FORM 990-P	F, PART I,	LINE 11	12.	12	•
FORM 990-PF		ACCOUNTI	NG FEES		STATEMENT 3
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		
ACCOUNTING FEES	<del></del>	2,000.			2,000.
ACCOUNTING FEED		2,000.		<u> </u>	

FORM 990-PF (	OTHER PROFES	SIONAL FEES		STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM	
INVESTMENT FEES PORTFOLIO DEDUCTIONS	2,637. 1,242.			0.
TO FORM 990-PF, PG 1, LN 16C	3,879.	3,879.		0.
FORM 990-PF	TAX	ES		STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM	
FOREIGN TAXES	79.	79.		0.
TO FORM 990-PF, PG 1, LN 18	79.	79.		0.
=				<u></u>
FORM 990-PF	OTHER E	XPENSES		STATEMENT 6
FORM 990-PF  DESCRIPTION	OTHER E  (A)  EXPENSES PER BOOKS	XPENSES  (B)  NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM	(D) CHARITABLE
	(A) EXPENSES	(B) NET INVEST-	ADJUSTED	(D) CHARITABLE
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	ADJUSTED	(D) CHARITABLE E PURPOSES
DESCRIPTION BANK FEES	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME  0.	ADJUSTED	(D) CHARITABLE E PURPOSES 280.
DESCRIPTION BANK FEES TO FORM 990-PF, PG 1, LN 23	(A) EXPENSES PER BOOKS 280.	(B) NET INVEST- MENT INCOME  0.  0.	ADJUSTED	(D) CHARITABLE PURPOSES  280.
DESCRIPTION BANK FEES TO FORM 990-PF, PG 1, LN 23 FORM 990-PF	(A) EXPENSES PER BOOKS 280.  CORPORAT	(B) NET INVEST- MENT INCOME  0.  0.	ADJUSTED NET INCOM	(D) CHARITABLE E PURPOSES  280.  280.  STATEMENT 7  FAIR MARKET

FORM 990-PF (	CORPORATE BONDS		STATEMENT 8
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CHARLES SCHWAB ACCT - BOND FUNDS		20,604.	20,165.
TOTAL TO FORM 990-PF, PART II, L	INE 10C	20,604.	20,165.
FORM 990-PF OT	THER INVESTMENTS		STATEMENT 9
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CHARLES SCHWAB ACCT - OTHER ASSET	rs fmv	13,757.	29,272.
TOTAL TO FORM 990-PF, PART II, LI	INE 13	13,757.	29,272.
FORM 990-PF	OTHER ASSETS		STATEMENT 10
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
BROWN ADVISORY PRIVATE EQUITY ACCEL VIII, LP LIFE INSURANCE POLICY	10,007. 780,000.	8,948. 910,000.	13,347. 782,168.
TO FORM 990-PF, PART II, LINE 15	790,007.	918,948.	795,515.

MICHAEL J & PATRICIA K BATZA FOUNDATION EIN: 52-1853565 2013 CONTIRBUTIONS, GIFTS, GRANTS PAID FORM 990-PF, PART XV, LINE 3

Recipient	Address	Relationship to Contributor	Foundation Status	Purpose of Contirbution	Amount
Boys Hope Girls Hope	3714 Fleetwood Avenue, Baltimore, MD 21206	None	Public	Unrestricted	1,200
Colgate University	13 Oak Drive, Hamilton, NY 13346	None	Public	Unrestricted	1,000
Filmmakers Collaborative	397 Moody Street, Waltham, MA 02453	None	Public	Unrestricted	2,500
Gettysburg College	300 N. Washington Street, Gettysburg, PA 17325	None	Public	Unrestricted	200
Hampden Family Center	1104 W 36th Street, Baltimore, MD 21211	None	Public	Unrestricted	1,000
The Hunger Project	5 Union Square West, 7th Floor, New York, NY 10003	None	Public	Unrestricted	10,000
Kennedy Kneger Institute	1750 E Fairmount Avenue, Baltimore, MD 21231	None	Public	Unrestricted	200
Living Classrooms Foundation	1417 Thames Street, Baltimore, MD 21231	None	Public	Unrestricted	1,500
Loyola University Maryland	4501 North Charles Street, Baltimore, MD 21210	None	Public	Unrestricted	3,500
McDaniel College	2 College Hill, Westminster, MD 21157	None	Public	Unrestricted	1,000
Miramichi Salmon Association (US) Ltd	389 Main Street, Suite 202, Malden, MA 02148	None	Public	Unrestricted	2,000
Notre Dame Preparatory School	815 Hampton Lane, Towson, MD 21286	None	Public	Unrestricted	200
The Odyssey School	3257 Bridle Ridge Lane, Stevenson, MD 21153	None	Public	Unrestricted	10,000
Parks & People Foundation	800 Wyman Park Drive, Baltimore, MD 21211	None	Public	Unrestricted	5,000
St Vincent de Paul of Baltimore	2305 N. Charles Street, Suite 300, Baltimore, MD 21218	None	Public	Unrestricted	2,000
There Goes My Hero Foundation	14112 Fox Manor Lane, Phoenix, MD 21131	None	Public	Unrestricted	1,000
					\$ 48,900