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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ **Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.**

▶ **Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.**

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation
Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

A Employer identification number
52-6041822

Number and street (or P O box number if mail is not delivered to street address)
c/o The Bernstein Cos 3299 K St NW
No 700

Room/suite

B Telephone number (see instructions)
(202) 333-9000

City or town, state or province, country, and ZIP or foreign postal code
Washington, DC 20007

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here ▶ ☐

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

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 11,572,085

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

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

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

Section	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	53,515	53,515		
	4	Dividends and interest from securities	159,223	159,223		
	5a	Gross rents	266,414	266,414		
	b	Net rental income or (loss) 266,414				
	6a	Net gain or (loss) from sale of assets not on line 10	505,303			
	b	Gross sales price for all assets on line 6a 4,350,336				
	7	Capital gain net income (from Part IV, line 2)		505,303		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	45,770	45,770		
	12	**Total.** Add lines 1 through 11	1,030,225	1,030,225		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	109,308	36,072		73,237
	14	Other employee salaries and wages	111,056	93,465		0
	15	Pension plans, employee benefits	3,800	3,420		380
	16a	Legal fees (attach schedule)	149	149		0
	b	Accounting fees (attach schedule)	14,286	12,857		1,429
	c	Other professional fees (attach schedule)	3,164	3,164		0
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	32,936	30,148		0
	19	Depreciation (attach schedule) and depletion	75,131	75,131		
	20	Occupancy				
	21	Travel, conferences, and meetings	9,847	8,863		985
	22	Printing and publications	9,963	8,397		22
	23	Other expenses (attach schedule)	226,046	191,853		15,213
	24	**Total operating and administrative expenses.** Add lines 13 through 23	595,686	463,519		91,266
	25	Contributions, gifts, grants paid	503,250			503,250
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,098,936	463,519		594,516
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-68,711			
	b	**Net investment income** (if negative, enter -0-)		566,706		
	c	**Adjusted net income** (if negative, enter -0-)				

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

			Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	63,433	3,870	3,870
	2	Savings and temporary cash investments	488,566	326,599	326,599
	3	Accounts receivable ▶ Less allowance for doubtful accounts ▶	5,100		
	4	Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ 517,575 Less allowance for doubtful accounts ▶ 0	528,981	517,575	502,000
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	6,468,577	6,885,518	8,309,964
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,370,142	1,355,752	1,035,274
	14	Land, buildings, and equipment basis ▶ 3,581,442 Less accumulated depreciation (attach schedule) ▶ 940,065	2,716,508	2,641,377	1,390,000
	15	Other assets (describe ▶)	0	4,378	4,378
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	11,641,307	11,735,069	11,572,085
Liabilities	17	Accounts payable and accrued expenses	422	4,688	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	422	4,688	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here** ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ **and complete lines 27 through 31.**			
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	2,013,433	2,008,433	
	29	Retained earnings, accumulated income, endowment, or other funds	9,627,452	9,721,948	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	11,640,885	11,730,381	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	11,641,307	11,735,069	

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	11,640,885
2	Enter amount from Part I, line 27a	2	-68,711
3	Other increases not included in line 2 (itemize) ▶	3	163,207
4	Add lines 1, 2, and 3	4	11,735,381
5	Decreases not included in line 2 (itemize) ▶	5	5,000
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	11,730,381

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)
1 a	Publicly Traded Securities			
b	Capital Gain Distributions			
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	4,279,353		3,845,033	434,320
b	70,983			70,983
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
a				434,320
b				70,983
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	505,303
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

1 Enter the appropriate amount in each column for each year, see page 18 of 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	528,972	10,442,464	0 050656
2011	394,909	8,418,661	0 046909
2010	319,788	5,540,181	0 057722
2009	171,791	4,999,165	0 034364
2008	151,294	3,445,989	0 043904

2	**Total** of line 1, column (d).	2	0 233555
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	0 046711
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	11,007,611
5	Multiply line 4 by line 3.	5	514,177
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	5,667
7	Add lines 5 and 6.	7	519,844
8	Enter qualifying distributions from Part XII, line 4.	8	594,516

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 page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ______ **(attach copy of letter if necessary–see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	5,667
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	5,667
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	5,667
6	Credits/Payments				
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2,674		
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	2,674
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached			8	44
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	3,037
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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
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		No
	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*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	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?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶DC			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b		No
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

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

Website address ▶N/A

14 The books are in care of ▶THE FOUNDATION Telephone no ▶(202) 333-9000

Located at ▶3299 K STREET NW WASHINGTON DC ZIP+4 ▶20007

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

			Yes	No
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
	See instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶			

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2013 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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)? (see instructions) ☐ **Yes** ☑ **No**			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ **Yes** ☑ **No**			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ **Yes** ☐ **No**			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ **Yes** ☑ **No**			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		**No**
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ **Yes** ☑ **No**			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		

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

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
See Additional Data Table				

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

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
NONE				
Total number of other employees paid over $50,000 ▶				0

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services. . . . . ▶		0

Part IX-A Summary of Direct Charitable Activities

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

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions 3	
Total. Add lines 1 through 3 . . . . ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	7,849,089
b	Average of monthly cash balances	1b	439,298
c	Fair market value of all other assets (see instructions)	1c	2,886,853
d	**Total** (add lines 1a, b, and c)	1d	11,175,240
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	11,175,240
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	167,629
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	11,007,611
6	**Minimum investment return.** Enter 5% of line 5	6	550,381

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	550,381
2a	Tax on investment income for 2013 from Part VI, line 5	2a	5,667		
b	Income tax for 2013 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	5,667
3	Distributable amount before adjustments Subtract line 2c from line 1			3	544,714
4	Recoveries of amounts treated as qualifying distributions			4	0
5	Add lines 3 and 4			5	544,714
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	544,714

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	594,516
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	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	594,516
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	5,667
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	588,849

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

Part XIII **Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				544,714
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 20___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008. 78,037				
b From 2009. 45,430				
c From 2010. 54,905				
d From 2011. 221,878				
e From 2012. 12,264				
f **Total** of lines 3a through e.	412,514			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 594,516				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				544,714
e Remaining amount distributed out of corpus	49,802			
5 Excess distributions carryover applied to 2013 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	0			0
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	462,316			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount —see instructions		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . .	78,037			
9 **Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a	384,279			
10 Analysis of line 9				
a Excess from 2009. . . . 45,430				
b Excess from 2010. . . . 54,905				
c Excess from 2011. . . . 221,878				
d Excess from 2012. . . . 12,264				
e Excess from 2013. . . . 49,802				

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

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

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

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

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

1 Information Regarding Foundation Managers:

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

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

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

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

a The name, address, and telephone number of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				503,250
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	53,515	
4 Dividends and interest from securities. . . .			14	159,223	
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			18	266,414	
7 Other investment income.	453000	45,500	18	270	
8 Gain or (loss) from sales of assets other than inventory			18	505,303	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .		45,500		984,725	0

13 **Total.** Add line 12, columns (b), (d), and (e). 13 1,030,225

(See worksheet in line 13 instructions to verify calculations)

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

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

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

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

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

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☑ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

******	2014-09-02	******
Signature of officer or trustee	Date	Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
Mark N Roth				P00505332

Firm's name	Hertzbach & Company PA	Firm's EIN 52-1158459
Firm's address	1530 Wilson Blvd Suite 700 Arlington, VA 22209	Phone no (703) 351-6600

Form 990PF Part VIII Line 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
Richard Bernstein 1054 31 st STreet NW Suite 1000 Washington, DC 20007	Vice President 1 00	0	0	0
Adam Bernstein 4409 Klinge Street Washington, DC 20016	Treasurer 1 00	0	0	0
Ami Becker Aronson 6917 Anchorage Drive Bethesda, MD 20817	Managing Executive Director 40 00	109,308	2,600	1,200
Mauree Jane Perry 2606 Jackson Street San Francisco, CA 94115	Secretary 1 00	0	0	0
Stuart Bernstein Il Lugano - 300 Seminole Avenue Apt 3B Palm Beach, FL 33480	President 1 00	0	0	0

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Alliance for Young Artists 197 East Broadway New York, NY 10002		Charitable	Community Service	25,000
American Friends of the Hebrew Universtiy One Battery Park Plaza 25th Floor New York, NY 10004		Charitable	Community Service	10,700
American University 801 Massachusetts Avenue Northwest Washington, DC 20016		Charitable	Community Service	32,000
C&O Canal Trust 1850 Dual Highway Suite 100 Hagerstown, MD 21740		Charitable	Community Service	6,250
DC Volunteer Lawyers Project 5335 Wisconsin Ave NW Suite 440 Washington, DC 20015		Charitable	Community Service	2,000
Elsie's Publishing PO Box 811 East Lansing, MI 48826		Charitable	Community Service	1,750
Embassy Series PO Box 9871 Washington, DC 20016		Charitable	Community Service	1,000
Enviornmental Workshop Group 1436 U Street NW 100 Washington, DC 20009		Charitable	Community Service	5,000
Gesher Jewish Day School 4800 Matte Moore CT Fairfax, VA 22030		Charitable	Community Service	1,000
Melvin J Berman Hebrew Academy 1632 U Street NW Washington, DC 20009		Charitable	Community Service	10,000
Anti-Defamation League 605 3rd Ave New York, NY 10158		Charitable	Community Service	6,250
Association of Small Foundations 1720 N Street NW Washington, DC 20036		Charitable	Community Service	1,000
Autism Speaks 1 East 33rd Street 4th Floor New York, NY 10016		Charitable	Community Service	1,500
BBYO 2020 K St NW Washington, DC 20006		Charitable	Community Service	10,000
BKS Iyengar Yoga 2404 27th Avenue San Francisco, CA 94116		Charitable	Community Service	5,000
Total . . . . ▶ **3a**				503,250

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Hebrew Home of Greater Washington 2700 F Street NW Washington, DC 20852		Charitable	Community Service	4,000
JerusalemonlineUcom 105 E 34th Street Suite 117 New York, NY 10016		Charitable	Community Service	20,000
American Jewish Historical Society 15 West 16th St New York, NY 10011		Charitable	Community Service	1,000
Joy of Motion Dance Center 1333 H St NE Washington, DC 20002		Charitable	Community Service	15,000
Kennedy Center for the Performing Arts 2700 F Street NW Washington, DC 20566		Charitable	Community Service	15,000
Kollel Vilna 3299 K St NW Suite 700 Washington, DC 20007		Charitable	Community Service	12,500
Leo Bernstein Jewish Academy 1401 Arcola Ave Silver Spring, MD 20902		Charitable	Community Service	26,800
Meritus College Fund PO Box 29024 San Francisco, CA 94129		Charitable	Community Service	12,500
iCivics 2001 S Street NW Washington, DC 20009		Charitable	Community Service	10,000
National Museum of Women in the Arts 1250 New York Ave NW Washington, DC 20005		Charitable	Community Service	15,000
New Dance Alliance 182 Duane St New York, NY 10013		Charitable	Community Service	4,000
Peninsula Temple Beth El 1700 Alameda de las Pulgas San Mateo, CA 94403		Charitable	Community Service	7,500
Sasha Bruce Youthwork Inc 741 8th St SE Washington, DC 20003		Charitable	Community Service	12,000
The Seed Foundation 1776 Massachusetts Ave NW Washington, DC 20036		Charitable	Community Service	2,000
Sixth & I Historic Synagogue 600 I Street NW Washington, DC 20001		Charitable	Community Service	35,000
Total . . . . ▶ **3a**				503,250

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Sonoma Community Center 276 E Napa St Sonoma, CA 95476		Charitable	Community Service	12,500
Stone Soup Films 1070 Thomas Jefferson St NW Suite 202 Washington, DC 20007		Charitable	Community Service	500
The Ideal School 314 West 91st Street New York, NY 10024		Charitable	Community Service	1,000
Yeshiva of Greater Washington 2010 Linden Land Silver Spring, MD 20910		Charitable	Community Service	10,000
Transformer 1404 P Street NW Washington, DC 20005		Charitable	Community Service	15,000
Trust for the National Mall PO Box 96475 Washington, DC 20090		Charitable	Community Service	25,000
University of Maryland University of Maryland College Park, MD 20742		Charitable	Community Service	5,000
Urban Alliance Foundation 2030 Q Street NW Washington, DC 20009		Charitable	Community Service	2,500
Vital Voices 1625 Massachusetts Ave NW Washington, DC 20036		Charitable	Community Service	10,000
Voss Foundation 236 W 30th St 12th Floor New York, NY 10001		Charitable	Community Service	500
WAMU 885 American University 4400 Massachusetts Ave NW Washington, DC 20016		Charitable	Community Service	25,000
Washington Animal Rescue League 71 Oglethrope St NW Washington, DC 20011		Charitable	Community Service	2,500
Washington Area Women's Foundation Inc 1331 H St NW Suite 1000 Washington, DC 20005		Charitable	Community Service	2,000
WETA Better Angels Society PO Box 60067 Florence, MA 01062		Charitable	Community Service	50,000
Word Dance Theater 4938 Hampden Lane Box 405 Bethesda, MD 20814		Charitable	Community Service	1,000
Total . . . . ▶ **3a**				503,250

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Ronald C Wornick Jewish Day School 800 Foster City Blvd Foster City, CA 94404		Charitable	Community Service	5,000
Friends of Lubavich 11621 Seven Locks Rd Potomac, MD 20854		Charitable	Community Service	10,000
Maor Inc 18318 Georgia Ave Olney, MD 20832		Charitable	Community Service	10,000
Nest 501 5th Avenue Ste1608 New York, NY 10017		Charitable	Community Service	5,000
Total . . . . ▶ **3a**				503,250

TY 2013 Accounting Fees Schedule

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	14,286	12,857		1,429

TY 2013 Explanation of Non-Filing with Attorney General Statement

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Statement: DC does not require 990-PF to be furnished to DC

TY 2013 Investments Corporate Stock Schedule

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Managed Portfolio	6,885,518	8,309,964

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TY 2013 Investments - Other Schedule

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Israel State Bonds	AT COST	1,000	1,000
Certificate of Deposit	AT COST	281,210	281,210
Brown Advisory Investors, LLP	AT COST	98,752	98,752
Bttwn - CRRT	AT COST	320,478	0
Battletown Inn	AT COST	650,000	650,000
Investment in Strasburg	AT COST	4,312	4,312

TY 2013 Legal Fees Schedule

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal Fees	149	149		0

TY 2013 Other Assets Schedule

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Reimbursement Clearing		4,378	4,378

TY 2013 Other Decreases Schedule

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Description	Amount
Basis Adjustment	5,000

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TY 2013 Other Expenses Schedule

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank Charges	341	328		0
Messenger/Delivery	581	523		58
Dues/Subscriptions	6,080	0		6,080
Metro	155	139		15
Meals & Entertainment	2,317	2,085		232
Office Supplies	8,323	7,094		153
Payroll Fees	302	272		30
Insurance	22,597	20,273		2,149
Utilities	36,692	30,901		36
Investment Fees	49,958	49,958		0
Repairs & Maintenance	23,429	16,655		90
Management Fees	67,889	59,237		3,600
Consulting	2,388	0		2,388
Miscellaneous	1,346	1,146		22
Auto Expenses	689	620		69
Postage	46	0		0
Seminars	2,089	1,880		209
Computer Support	681	613		68
Hospitality	143	129		14

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TY 2013 Other Income Schedule

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Late Fees	193	193	193
Miscellaneous	45,500	45,500	45,500
Other Income	77	77	77

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TY 2013 Other Increases Schedule

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Description	Amount
Unrealized Gains	163,207

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2013 Other Notes/Loans Receivable Long Schedule

Name: Leo M Bernsteın Famıly Foundatıon

Attn Amı Becker Aronson

EIN: 52-6041822

Borrower's Name	Relationship to Insider	Original Amount of Loan	Balance Due	Date of Note	Maturity Date	Repayment Terms	Interest Rate	Security Provided by Borrower	Purpose of Loan	Description of Lender Consideration	Consideration FMV
Darrell Bates		0	100,000				0 %				0
J Drıscoll		0	66,630				0 %				0
F&Crabıll Inc		0	90,945				0 %				0
B Brıll		0	260,000				0 %				0

TY 2013 Other Professional Fees Schedule

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Professional Fees	3,164	3,164		0

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TY 2013 Taxes Schedule

Name: Leo M Bernstein Family Foundation
Attn Ami Becker Aronson

EIN: 52-6041822

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foregin Taxes	2,337	2,337		0
Payroll Taxes	4,681	3,939		0
Other Taxes	2,400	2,400		0
Real Estate Taxes	21,472	21,472		0
State Taxes	2,046	0		0