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Return of Private Foundation

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

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

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation THE IRWIN P. EDLAVITCH FOUNDATION, INC.		A Employer identification number 54-1907348
Number and street (or P.O. box number if mail is not delivered to street address) 185 CHAIN BRIDGE ROAD	Room/suite	B Telephone number 703-524-0909
City or town, state or province, country, and ZIP or foreign postal code MCLEAN, VA 22101		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 2,124,266.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		202,975.		N/A	
2 Check ☐ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		59,340.	58,960.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		125,062.			
b Gross sales price for all assets on line 6a 1,824,123.					
7 Capital gain net income (from Part IV, line 2)			125,062.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		387,377.	184,022.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 2		7,400.	3,700.		3,700.
c Other professional fees STMT 3		13,902.	6,951.		6,951.
17 Interest					
18 Taxes STMT 4		299.	150.		149.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 5		25.	12.		13.
24 Total operating and administrative expenses. Add lines 13 through 23		21,626.	10,813.		10,813.
25 Contributions, gifts, grants paid		282,500.			282,500.
26 Total expenses and disbursements. Add lines 24 and 25		304,126.	10,813.		293,313.
27 Subtract line 26 from line 12:		83,251.			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			173,209.		
c Adjusted net income (if negative, enter -0-)				N/A	

SCANNED JUL 29 2014

Revenue

Operating and Administrative Expenses

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	5,010.		
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment: basis ▶			
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 6	1,917,946.	2,003,757.	2,124,266.	
14 Land, buildings, and equipment: basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	1,922,956.	2,003,757.	2,124,266.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☒			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	1,922,956.	2,003,757.	
	30 Total net assets or fund balances	1,922,956.	2,003,757.	
	31 Total liabilities and net assets/fund balances	1,922,956.	2,003,757.	

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	1,922,956.
2 Enter amount from Part I, line 27a	2	83,251.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,006,207.
5 Decreases not included in line 2 (itemize) ▶ EXCISE TAX	5	2,450.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,003,757.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a WELLS FARGO - SEE ATTACHED	P	VARIOUS	VARIOUS
b WELLS FARGO - SEE ATTACHED	P	VARIOUS	VARIOUS
c WELLS FARGO - COST BASIS ADJUSTMENT	P	VARIOUS	VARIOUS
d CAPITAL GAINS DIVIDENDS			
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 512,501.		493,570.	18,931.
b 1,264,313.		1,205,315.	58,998.
c		176.	<176.>
d 47,309.			47,309.
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			18,931.
b			58,998.
c			<176.>
d			47,309.
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	125,062.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	361,759.	1,942,913.	.186194
2011	274,650.	1,677,283.	.163747
2010	142,863.	1,825,004.	.078281
2009	333,826.	1,694,190.	.197042
2008	124,238.	2,180,034.	.056989

2 Total of line 1, column (d)	2	.682253
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	.136451
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	1,997,851.
5 Multiply line 4 by line 3	5	272,609.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,732.
7 Add lines 5 and 6	7	274,341.
8 Enter qualifying distributions from Part XII, line 4	8	293,313.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	1,732.
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	1,732.
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	1,732.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2,840.	
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	2,840.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,108.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax ☒ 1,108. Refunded ☐	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ VA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions).	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► NOT APPLICABLE	13	X	
14	The books are in care of ► IRWIN EDLAVITCH Telephone no. ► 703-524-0909 Located at ► 185 CHAIN BRIDGE ROAD, MCLEAN, VA ZIP+4 ► 22101			
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 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, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► N/A	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☒ No If "Yes," list the years ►		
b	Are there any years listed in 2a for which the foundation is <u>not</u> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
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) N/A	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

If "Yes" to 6b, file Form 8870.

☐ Yes ☒ No

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

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

N/A

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
IRWIN P. EDLAVITCH 185 CHAIN BRIDGE ROAD MCLEAN, VA 22101	PRESIDENT/DIRECTOR 1.00	0.	0.	0.
GINNY S. ABRAMS 185 CHAIN BRIDGE ROAD MCLEAN, VA 22101	SECRETARY/DIRECTOR 0.00	0.	0.	0.

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

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

Total number of other employees paid over \$50,000

0

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. 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 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	2,026,161.
b Average of monthly cash balances	1b	2,114.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	2,028,275.
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	2,028,275.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	30,424.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,997,851.
6 Minimum investment return. Enter 5% of line 5	6	99,893.

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	99,893.
2a Tax on investment income for 2013 from Part VI, line 5	2a	1,732.
b Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	1,732.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	98,161.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	98,161.
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	98,161.

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	293,313.
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	293,313.
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	1,732.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	291,581.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				98,161.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008	18,905.			
b From 2009	250,146.			
c From 2010	52,479.			
d From 2011	193,951.			
e From 2012	270,215.			
f Total of lines 3a through e	785,696.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ \$	293,313.			
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				98,161.
e Remaining amount distributed out of corpus	195,152.			
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	980,848.			
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 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	18,905.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	961,943.			
10 Analysis of line 9:				
a Excess from 2009	250,146.			
b Excess from 2010	52,479.			
c Excess from 2011	193,951.			
d Excess from 2012	270,215.			
e Excess from 2013	195,152.			

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				
JEWISH FOUNDATION FOR GROUP HOMES 1500 EAST JEFFERSON STREET ROCKVILLE, MD 20852	NONE	PUBLIC CHARITY	GENERAL	30,000.
KRAVIS CENTER FOR ART 701 OKEECHOBEE BOULEVARD WEST PALM BEACH, FL 33401	NONE	PUBLIC CHARITY	GENERAL	12,500.
NATIONAL GALLERY OF ART SIXTH STREET AND CONSTITUTION AVE., NW WASHINGTON, DC 20565	NONE	PUBLIC CHARITY	GENERAL	20,000.
NATIONAL SYMPHONY ORCHESTRA 2700 F STREET, NW WASHINGTON, DC 20566	NONE	PUBLIC CHARITY	GENERAL	20,000.
WASHINGTON HEBREW CONGREGATION 11810 FALLS ROAD POTOMAC, MD 20854	NONE	PUBLIC CHARITY	GENERAL	200,000.
Total			3a	282,500.
b Approved for future payment				
NONE				
Total			3b	0.

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.gov/form990.

OMB No 1545-0047

2013

Name of the organization

THE IRWIN P. EDLAVITCH FOUNDATION, INC.

Employer identification number

54-1907348

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 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 foundationCheck 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, charitable, 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
THE IRWIN P. EDLAVITCH FOUNDATION, INC.	54-1907348

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	IRWIN P. EDLAVITCH 185 CHAIN BRIDGE ROAD MCLEAN, VA 22101	\$ 202,975.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Employer identification number

54-1907348

Part II

[illegible]

Name of organization

Employer identification number

THE IRWIN P. EDLAVITCH FOUNDATION, INC.**54-1907348**

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter 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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
WELLS FARGO - CAPITAL GAIN DIVIDENDS	47,309.	47,309.	0.	0.	
WELLS FARGO - DIVIDEND INCOME	58,960.	0.	58,960.	58,960.	
WELLS FARGO - NONDIVIDEND DISTRIBUTION	380.	0.	380.	0.	
TO PART I, LINE 4	106,649.	47,309.	59,340.	58,960.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	7,400.	3,700.		3,700.
TO FORM 990-PF, PG 1, LN 16B	7,400.	3,700.		3,700.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEE	13,902.	6,951.		6,951.
TO FORM 990-PF, PG 1, LN 16C	13,902.	6,951.		6,951.

FORM 990-PF	TAXES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	299.	150.		149.
TO FORM 990-PF, PG 1, LN 18	299.	150.		149.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS	25.	12.		13.
TO FORM 990-PF, PG 1, LN 23	25.	12.		13.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	6
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
WELLS FARGO INVESTMENTS	COST	2,003,757.	2,124,266.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,003,757.	2,124,266.

2013 SUMMARY AMENDMENT

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Amended Date: 2/14/14

Your Financial Advisor :

BERT BURSON
7901 WISCONSIN AVE, 2ND FL
BETHESDA, MD 20814
(800) 503-6232

THE IRWIN AND GINNY EDLAVITCH
FOUNDATION, INC
185 CHAIN BRIDGE RD
MC LEAN VA 22101-1907

Account Number: 5178-8226

Year-End Account Summary

This information is NOT provided to the Internal Revenue Service, but is being provided to you for courtesy purposes.
Please consult with your Financial Advisor or Tax Advisor regarding specific questions.

For noncovered transactions, we provide supplemental cost basis information, when it is available, to assist you with completing your tax return, however, THIS INFORMATION IS NOT PROVIDED TO THE INTERNAL REVENUE SERVICE.

SHORT TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6)
Proceeds from Broker and Barter Exchange Transactions for 2013

8-Description / CUSIP	1a-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information Gain or Loss Amount	Additional Information
1a-Date of Sale or Exchange						
ADVISORS INNER CIRCLE / 00764Q405						
FD II INC NEW CHAMPLAIN						
SMALL CO FUND						
09/17/13	379.5970	03/26/13	6,521.47	5,834.41	687.06	SALE
ALGER SMALLCAP AND / 015565468						
MIDCAP GROW CL I						
03/25/13	196.3110	12/19/12	3,580.72	3,290.18	290.54	SALE
AMERICAN CENTY INVT TR / 024932600						
DIVERSIFIED BD FD INSTL						
CL						
18.6230	04/02/12	206.15	205.04	1.11		
20.9860	05/01/12	232.31	232.95	-0.64		
21.1200	06/01/12	233.79	235.91	-2.12		
21.8340	07/02/12	241.70	243.67	-1.97		
19.5300	08/01/12	216.19	220.88	-4.69		
22.0030	09/04/12	243.57	248.63	-5.06		
8,836.8130	09/07/12	97,823.55	99,502.52	-1,678.97		
30.3580	10/01/12	336.06	343.05	-6.99		
39.7600	11/01/12	440.14	448.89	-8.75		
41.7010	12/04/12	461.63	470.80	-9.17		
79.1800	12/10/12	876.52	885.23	-8.71		
73.5800	12/10/12	814.53	822.62	-8.09		
34.1370	01/02/13	377.90	380.63	-2.73		
29.9490	02/01/13	331.54	331.24	0.30		
33.1950	03/01/13	367.48	368.13	-0.65		

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2013 SUMMARY AMENDMENT

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Amended Date: 2/14/14

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THE IRWIN AND GINNY EDLAVITCH
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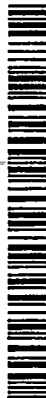
Year-End Account Summary

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continued

SHORT TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6) Proceeds from Broker and Barter Exchange Transactions for 2013

8-Description / CUSIP 1a-Date of Sale or Exchange	1b-Date of Acquisition	1e-Quantity Sold	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information	
					Amount	Additional Information
03/25/13	Various	9,322.7690	103,203.06	104,940.19	-1,737.13	SALE TOTAL 15 LOTS
AMERICAN CENTRY MUT FDS / 025083205						
GROWTH FUND - INSTL						
04/09/13	03/26/13	49.3540	1,443.61	1,440.65	2.96	SALE
04/17/13	03/26/13	95.7580	2,772.19	2,795.18	-22.99	SALE
09/17/13	03/26/13	264.4600	8,542.05	7,719.59	822.46	SALE
BLACKROCK FDS II / 091928747						
CORE BOND PORT						
INSTL CLASS						
03/25/13	Various	378.1490	3,686.96	3,665.22	21.74	SALE TOTAL 12 LOTS
DELAWARE GROUP EQUITY / 24610C857						
FDS II-VALUE FD INSTL CL						
04/09/13	03/26/13	127.5480	1,774.19	1,766.54	7.65	SALE
04/17/13	03/26/13	215.1110	2,968.53	2,979.29	-10.76	SALE



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2013 SUMMARY AMENDMENT

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Amended Date: 2/14/14

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SHORT TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6)
Proceeds from Broker and Barter Exchange Transactions for 2013

continued

8-Description / CUSIP			Supplemental Information			
1a-Date of Sale or Exchange	1e-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Gain or Loss Amount	Additional Information
12/18/13	408.4190	03/26/13	6,542.88	5,656.61	886.27	SALE
EUROPACIFIC GROWTH FD / 298706409						
CL F-1						
	58.5430	09/07/12	2,447.68	2,287.29	160.39	
	41.5790	12/27/12	1,738.43	1,692.70	45.73	
03/25/13	100.1220	Various	4,186.11	3,979.99	206.12	SALE
					TOTAL 2 LOTS	
FIDELITY ADV EMERG / 315920702						
MKTS INC CL I						
	2,549.5520	09/07/12	37,121.48	37,784.34	-662.86	
	6.5830	10/01/12	95.84	97.56	-1.72	
	9.1740	11/01/12	133.57	136.60	-3.03	
	0.6230	11/09/12	9.07	9.28	-0.21	
	9.1090	12/03/12	132.62	137.63	-5.01	
	23.7060	12/24/12	345.16	355.36	-10.20	
	11.6810	12/24/12	170.07	175.10	-5.03	
	9.1040	01/02/13	132.56	136.84	-4.28	
	9.1840	02/01/13	133.72	136.94	-3.22	
	13.5170	02/19/13	196.81	199.78	-2.97	
	8.0820	03/01/13	117.69	119.05	-1.36	
03/25/13	2,650.3150	Various	38,588.59	39,288.48	-699.89	SALE
					TOTAL 11 LOTS	
FIRST EAGLE FUNDS / 32008F200						
SOGEN OVERSEAS FUND CL I						
04/09/13	40.4880	03/26/13	946.60	938.92	7.68	SALE
05/02/13	46.5740	03/26/13	1,100.08	1,080.06	20.02	SALE

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2013 SUMMARY AMENDMENT

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Amended Date: 2/14/14

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THE IRWIN AND GINNY EDLAVITCH
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 MC LEAN VA 22101-1907

Account Number: 5178-8226

Year-End Account Summary

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continued

SHORT TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6)
Proceeds from Broker and Barter Exchange Transactions for 2013

8-Description / CUSIP 1a-Date of Sale or Exchange	1e-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information	
					Gain or Loss Amount	Additional Information
FMI FDS INC / 302933106 FOCUS FUND 09/17/13	178.5140	03/26/13	7,251.23	6,339.04	912.19	SALE
HANCOCK JOHN CAP SER / 409902756 CLASSIC VALUE FD CL I 04/09/13	38.9380	03/26/13	773.31	772.92	0.39	SALE
04/17/13	105.0500	03/26/13	2,048.47	2,085.25	-36.78	SALE
05/02/13	96.9500	03/26/13	1,977.79	1,924.46	53.33	SALE
07/24/13	306.8030	03/26/13	6,900.00	6,090.04	809.96	SALE
12/18/13	356.0740	03/26/13	8,463.87	7,068.07	1,395.80	SALE
HARBOR FD / 411511306 INTL FD INSTL CL 04/17/13	33.8380	03/26/13	2,108.11	2,147.37	-39.26	SALE
05/02/13	19.4340	03/26/13	1,269.98	1,233.29	36.69	SALE
09/17/13	26.4880	03/26/13	1,826.59	1,680.93	145.66	SALE
ING SER FD INC / 44981M250 SMALL CO FD CL I 09/17/13	573.2610	03/26/13	10,376.02	9,183.65	1,192.37	SALE
INVESCO GLOBAL REAL / 00142C219 ESTATE Y 04/09/13	166.4960	03/26/13	2,102.84	2,029.59	73.25	SALE
05/02/13	87.2670	03/26/13	1,143.20	1,063.79	79.41	SALE



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2013 SUMMARY AMENDMENT

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Amended Date: 2/14/14

ADVISORS

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SHORT TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6)
Proceeds from Broker and Barter Exchange Transactions for 2013

continued

8-Description / CUSIP 1a-Date of Sale or Exchange	1e-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information	
					Gain or Loss Amount	Additional Information
JOHN HANCOCK FDS III / 47803U509 GLOBAL SHAREHOLDER YLD CLASS I	36.2070 82.1700 35.9140 36.5250 190.8160	03/28/12 06/27/12 09/26/12 12/18/12 Various	385.60 875.11 382.49 389.00 2,032.20	357.73 769.11 362.01 368.17 1,857.02	27.87 106.00 20.48 20.83 175.18	SALE
03/25/13						TOTAL 4 LOTS

JPMORGAN CORE BOND FD / 4812C0381
SELECT

34.9100	04/02/12	419.26	413.34	5.92	
31.4570	05/01/12	377.79	375.60	2.19	
31.3500	06/01/12	376.51	376.51	0.00	
30.3930	07/02/12	365.01	364.41	0.60	
32.3430	08/01/12	388.43	391.35	-2.92	
30.2370	09/04/12	363.14	366.17	-3.03	
8,268.2230	09/07/12	99,301.40	99,962.82	-661.42	
47.6200	10/01/12	571.91	577.15	-5.24	
45.4830	11/01/12	546.25	551.25	-5.00	
45.5430	12/03/12	546.97	552.44	-5.47	
24.5350	12/14/12	294.66	296.63	-1.97	
2.2400	12/14/12	26.90	27.08	-0.18	
54.0310	01/02/13	648.92	651.61	-2.69	
42.2160	02/01/13	507.04	505.77	1.27	
43.9550	03/01/13	527.91	527.90	0.01	
8,764.5380	Various	105,262.10	105,940.03	-677.93	SALE
03/25/13					TOTAL 15 LOTS

MAINSTAY FD HIGH YIELD / 56062X708
CORPORATE BD FD CL I

39.2060	09/28/12	235.63	237.59	-1.96	
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2013 SUMMARY AMENDMENT

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Amended Date: 2/14/14

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THE IRWIN AND GINNY EDLAVITCH
FOUNDATION, INC.
185 CHAIN BRIDGE RD
MC LEAN VA 22101-1907

Account Number: 5178-8226

Year-End Account Summary

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continued

SHORT TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6)
Proceeds from Broker and Barter Exchange Transactions for 2013

8-Description / CUSIP 1a-Date of Sale or Exchange	1e-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information	
					Gain or Loss Amount	Additional Information
	39.3110	11/02/12	236.26	239.01	-2.75	
	39.5460	12/03/12	237.67	240.44	-2.77	
	39.9790	12/04/12	240.28	241.87	-1.59	
	37.9430	02/01/13	228.04	233.35	-5.31	
	38.1670	03/01/13	229.39	234.73	-5.34	
	38.0220	03/26/13	228.53	235.74	-7.21	
09/17/13	272.1740	Various	1,635.80	1,662.73	-26.93	SALE
10/09/13	42.7660	03/26/13	257.45	265.15	-7.70	SALE
TOTAL 7 LOTS						
MAINSTAY FDS TR / 560648787						
CORNERSTONE GROWTH FD CLASS I						
04/17/13	60.3050	03/26/13	1,765.14	1,807.35	-42.21	SALE
12/18/13	6.7560	03/26/13	210.60	202.48	8.12	SALE
MANAGERS AMG FDS / 561709833						
TIMESQUARE MID CAP GROWTH FD PREMIER CL						
09/17/13	296.4700	03/25/13	5,458.02	4,933.27	524.75	SALE
12/18/13	242.0370	03/25/13	4,782.65	4,027.50	755.15	SALE
MANAGERS FUNDS BOND / 561717505						
FUND						
	7.5690	03/28/12	212.76	202.01	10.75	
	7.2660	04/26/12	204.24	194.51	9.73	
	7.2550	05/29/12	203.93	192.99	10.94	
	6.5880	06/27/12	185.19	176.23	8.96	
	6.9450	07/27/12	195.22	188.77	6.45	
	6.8160	08/29/12	191.60	186.09	5.51	
	6.5890	09/26/12	185.22	182.05	3.17	



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2013 SUMMARY AMENDMENT

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Amended Date: 2/14/14

Your Financial Advisor :
BERT BURSON
7901 WISCONSIN AVE, 2ND FL
BETHESDA, MD 20814
(800) 503-6232

THE IRWIN AND GINNY EDLAVITCH
FOUNDATION, INC
185 CHAIN BRIDGE RD
MC LEAN VA 22101-1907

Account Number: 5178-8226

Year-End Account Summary

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Please consult with your Financial Advisor or Tax Advisor regarding specific questions.

SHORT TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6) Proceeds from Broker and Barter Exchange Transactions for 2013

continued

8-Description / CUSIP 1a-Date of Sale or Exchange	1e-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information	
					Gain or Loss Amount	Additional Information
03/25/13 MFS SER TR I / 552983694 VALUE FD CL I	6,5960	10/29/12	185.41	183.69	1.72	
	6,4500	11/28/12	181.31	179.89	1.42	
	11,6730	12/27/12	328.13	325.55	2.58	
	6,0300	01/29/13	169.51	168.96	0.55	
	4,7900	02/26/13	134.66	134.49	0.17	
					61.95	SALE
					2,315.23	
					TOTAL 12 LOTS	
03/25/13 MFS SER TR X / 55273E640 EMERGING MKTS DEBT FD CLASS I	674,7450	09/06/12	19,034.55	17,199.24	1,835.31	
	3,876,6020	09/07/12	109,358.95	99,047.17	10,311.78	
	19,6980	09/26/12	555.68	504.46	51.22	
	33,1890	12/12/12	936.26	845.00	91.26	
	29,9360	12/12/12	844.50	762.18	82.32	
					118,358.05	SALE
					12,371.89	
					TOTAL 5 LOTS	
04/09/13 05/02/13 10/09/13 NUVEEN INVT FDS INC / 670678507 REAL ESTATE SECS FUND CL I	193,9750	03/26/13	3,138.52	3,086.15	52.37	SALE
	77,2670	03/26/13	1,254.81	1,229.32	25.49	SALE
	225,4250	03/26/13	3,318.26	3,586.52	-268.26	SALE
	13,7960	04/02/12	309.85	287.78	22.07	
	10,8110	07/02/12	242.81	232.97	9.84	
	3,4380	09/21/12	77.21	75.25	1.96	

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2013 SUMMARY AMENDMENT

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Amended Date: 2/14/14

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continued

SHORT TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6) Proceeds from Broker and Barter Exchange Transactions for 2013

8-Description / CUSIP 1a-Date of Sale or Exchange	1e-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information	
					Gain or Loss Amount	Additional Information
03/25/13	9,9670	10/01/12	223.86	213.80	10.06	
	29,5220	12/17/12	663.07	50.78	50.78	
	24,4480	12/17/12	549.11	507.06	42.05	
	8,4300	12/31/12	189.35	177.36	11.99	
	100,4120	Various	2,255.26	2,106.51	148.75	SALE
TOTAL 7 LOTS						
OPPENHEIMER DEV MKTS / 683974505						
CL Y						
04/17/13	40,4560	03/25/13	1,379.54	1,397.36	-17.82	SALE
09/17/13	22,2170	03/25/13	811.80	767.38	44.42	SALE
RS INVT TR / 74972H614						
VALUE FD CL Y						
04/09/13	7,2130	03/25/13	215.30	214.81	0.49	SALE
04/17/13	38,5000	03/25/13	1,129.58	1,146.53	-16.95	SALE
09/17/13	134,1270	03/25/13	4,412.77	3,994.31	418.46	SALE
T ROWE PRICE BLUE CHIP / 77954Q106						
GROWTH FUND						
03/25/13	41,2360	09/07/12	2,002.42	1,902.62	99.80	
	6,5200	12/17/12	316.62	292.67	23.95	
	47,7560	Various	2,319.04	2,195.29	123.75	SALE
TOTAL 2 LOTS						
T ROWE PRICE INTL FDS / 77956H104						
INC INTL BD FD						
04/09/13	76,6050	03/25/13	747.66	744.05	3.61	SALE
04/17/13	100,4770	03/25/13	978.65	975.90	2.75	SALE
10/09/13	231,4300	03/25/13	2,226.36	2,244.58	-18.22	SALE



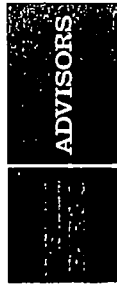
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2013 SUMMARY AMENDMENT

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Amended Date: 2/14/14



Your Financial Advisor :
 BERT BURSON
 7901 WISCONSIN AVE, 2ND FL
 BETHESDA, MD 20814
 (800) 503-6232

THEIRWIN AND GINNY EDLAVITCH
 FOUNDATION, INC
 185 CHAIN BRIDGE RD
 MC LEAN VA 22101-1907

Account Number: 5178-8226

Year-End Account Summary

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continued

SHORT TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6)

Proceeds from Broker and Barter Exchange Transactions for 2013

8-Description / CUSIP 1a-Date of Sale or Exchange	1e-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information Gain or Loss Amount	Additional Information
WT MUT FD / 92934RT24	44.6490	12/13/12	744.30	663.48	80.82	
CRM SMALL/MID CAP VALUE	30.8060	12/13/12	513.54	457.78	55.76	
FD INV CL	26.7700	12/13/12	446.26	397.80	48.46	
03/25/13	102.2250	12/13/12	1,704.10	1,519.06	185.04	SALE
					TOTAL 3 LOTS	

TOTAL SHORT TERM GAINS OR LOSSES FOR COVERED SECURITIES

512,501.18 493,570.29 18,930.89

LONG TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6)

Proceeds from Broker and Barter Exchange Transactions for 2013

8-Description / CUSIP 1a-Date of Sale or Exchange	1e-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information Gain or Loss Amount	Additional Information
ALGER SMALLCAP AND / 015565468						
MIDCAP GROW CL I						
03/25/13	4,545.0700	03/07/12	82,902.07	76,811.68	6,090.39	SALE
AMERICAN CENTY INVT TR / 024932600						
DIVERSIFIED BD FD INSTL						
CL						
03/25/13	8,318.9040	03/07/12	92,090.26	92,090.25	0.01	SALE
BLACKROCK FDS II / 091928747						
CORE BOND PORT						
INSTL CLASS						
03/25/13	11,702.7030	03/07/12	114,101.35	111,245.15	2,856.20	SALE

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2013 SUMMARY AMENDMENT

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Amended Date: 2/14/14

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continued

LONG TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6)
Proceeds from Broker and Barter Exchange Transactions for 2013

8-Description / CUSIP 1a-Date of Sale or Exchange	1e-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information	
					Gain or Loss Amount	Additional Information
EUROPACIFIC GROWTH FD / 298706409 CL F-1 03/25/13	2,355.1210	03/07/12	98,467.60	90,224.69	8,242.91	SALE
GOLDMAN SACHS TR / 38142B500 FINL SQUARE TREAS INSTRS FD INSTL CL 04/12/13	784.6100	03/07/12	784.61	784.61	0.00	SALE
07/12/13	3,362.1400	03/07/12	3,362.14	3,362.14	0.00	SALE
10/11/13	3,580.2100	03/07/12	3,580.21	3,580.21	0.00	SALE
JOHN HANCOCK FDS III / 47803U509 GLOBAL SHAREHOLDER YLD CLASS I 03/25/13	5,667.4350	03/07/12	60,358.17	55,030.78	5,327.39	SALE
JPMORGAN CORE BOND FD / 4812C0381 SELECT 03/25/13	12,395.4490	03/07/12	148,869.34	147,753.74	1,115.60	SALE
MAINSTAY FD HIGH YIELD / 56062X708 CORPORATE BD FD CL I 04/09/13	208.5710	03/07/12	1,288.97	1,238.92	50.05	SALE
04/17/13	219.7240	03/07/12	1,360.09	1,305.16	54.93	SALE
05/02/13	57.7280	03/07/12	360.22	342.91	17.31	SALE
	5,543.3250	03/07/12	33,315.38	32,927.33	388.05	
	39.6680	04/02/12	238.40	235.23	3.17	
	39.7760	05/01/12	239.05	236.67	2.38	
	40.5660	06/01/12	243.80	238.12	5.68	



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2013 SUMMARY AMENDMENT

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ADVISORS

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THE IRWIN AND GINNY EDLAVITCH
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LONG TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6) Proceeds from Broker and Barter Exchange Transactions for 2013

continued

8-Description / CUSIP 1a-Date of Sale or Exchange	1e-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information	
					Gain or Loss Amount	Additional Information
09/17/13	40 5400 40 2440 40 2190 5,784.3380	06/29/12 08/01/12 09/04/12 Various	243.64 241.86 241.71 34,763.84	239.59 241.06 242.52 34,360.52	4.05 0.80 -0.81 403.32	SALE SALE SALE TOTAL 7 LOTS
MANAGERS FUNDS BOND / 561717505						
FUND 03/25/13	2,038.2490	03/07/12	57,295.18	54,645.44	2,649.74	SALE
METROPOLITAN WEST FDS / 592905509						
TOTAL RETURN BD FD CL I 03/25/13	8,876.9840	03/07/12	96,847.89	93,740.95	3,106.94	SALE
04/09/13	229.6020	03/07/12	2,516.44	2,424.60	91.84	SALE
04/17/13	68.7410	03/07/12	754.09	725.91	28.18	SALE
09/17/13	3,183.9160	03/07/12	33,462.96	33,622.15	-159.19	SALE
10/09/13	206.6780	03/07/12	2,192.85	2,182.52	10.33	SALE
NUVEEN INVT FDS INC / 670678507						
REAL ESTATE SECS FUND CL I 03/25/13	1,767.0970	03/07/12	39,688.99	35,500.97	4,188.02	SALE
PIMCO FDS PAC INVT / 693390700						
MGMT SER TOTAL RETURN FD INSTL CL 03/25/13	6,726.0530	03/07/12	75,533.58	74,928.23	605.35	SALE
04/09/13	258.9830	03/07/12	2,926.51	2,885.08	41.43	SALE
04/17/13	100.2450	03/07/12	1,132.77	1,116.73	16.04	SALE

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2013 SUMMARY AMENDMENT

Page 16 of 24

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continued

**LONG TERM GAINS OR LOSSES (Box 1c) FOR COVERED SECURITIES (Box 6)
 Proceeds from Broker and Barter Exchange Transactions for 2013**

8-Description / CUSIP 1a-Date of Sale or Exchange	1e-Quantity Sold	1b-Date of Acquisition	2a-Sales Price*	3-Cost or Other Basis	Supplemental Information	
					Gain or Loss Amount	Additional Information
09/17/13	4,704.2360	03/07/12	50,241.24	52,405.19	-2,163.95	SALE
10/09/13	222.6400	03/07/12	2,408.96	2,480.21	-71.25	SALE
PIMCO FDS PAC INVT / 693391880						
MGMT SER DIVERSIFIED INCOME FD INSTL CL						
03/25/13	4,778.6110	03/07/12	58,155.69	55,718.60	2,437.09	SALE
04/09/13	172.9900	03/07/12	2,126.05	2,017.07	108.98	SALE
05/02/13	118.1030	03/07/12	1,468.02	1,377.09	90.93	SALE
10/09/13	181.3250	03/07/12	2,096.12	2,114.25	-18.13	SALE
T ROWE PRICE BLUE CHIP / 77954Q106						
GROWTH FUND						
03/25/13	2,126.6810	03/07/12	103,271.62	92,191.62	11,080.00	SALE
VIRTUS / 92828T889						
EMERGING MARKETS OPPORTUNITIES FND CL I						
04/17/13	154.4160	03/07/12	1,602.84	1,476.22	126.62	SALE
05/02/13	132.0280	03/07/12	1,425.90	1,262.19	163.71	SALE
WT MUT FD / 92934R124						
CRM SMALL/MID CAP VALUE FD INV CL						
03/25/13	5,211.5640	03/07/12	86,876.76	74,369.00	12,507.76	SALE
TOTAL LONG TERM GAINS OR LOSSES FOR COVERED SECURITIES			1,264,313.33	1,205,314.78	58,998.55	



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Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

Department of the Treasury
Internal Revenue Service

► File a separate application for each return.

► Information about Form 8868 and its instructions is at www.irs.gov/form8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6 month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number
	THE IRWIN P. EDLAVITCH FOUNDATION, INC.	Employer identification number (EIN) or 54-1907348
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions. 185 CHAIN BRIDGE ROAD	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions MCLEAN, VA 22101	

Enter the Return code for the return that this application is for (file a separate application for each return) **04**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

IRWIN EDLAVITCH

- The books are in the care of ► **185 CHAIN BRIDGE ROAD - MCLEAN, VA 22101**

Telephone No. ► **703-524-0909**

Fax No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2014**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
 - ☒ calendar year **2013** or
 - ☐ tax year beginning _____, and ending _____

- If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	S	1,732.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	S	2,840.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	S	0.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.