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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
SIDNEY AND LOIS GEFEN FAMILY FOUNDATION INC

A Employer identification number
59-2610691

Number and street (or P O box number if mail is not delivered to street address) 6550 SAINT AUGUSTINE ROAD
Room/suite

B Telephone number (see instructions)
(904) 296-2630

City or town, state or province, country, and ZIP or foreign postal code
JACKSONVILLE, FL 32217

C If exemption application is pending, check here ▶ ☐

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

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

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 530,562

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

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

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

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	24,388			
	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	12,540	12,540	12,540	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	17,209			
	b	Gross sales price for all assets on line 6a 136,966				
	7	Capital gain net income (from Part IV, line 2)		17,209		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	54,137	29,749	12,540	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest	65	65		
	18	Taxes (attach schedule) (see instructions)	61	61		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	5,424	4,877	4,877	
	24	**Total operating and administrative expenses.** Add lines 13 through 23	5,550	5,003	4,877	0
	25	Contributions, gifts, grants paid	27,500			27,500
	26	**Total expenses and disbursements.** Add lines 24 and 25	33,050	5,003	4,877	27,500
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	21,087			
	b	**Net investment income** (if negative, enter -0-)		24,746		
	c	**Adjusted net income** (if negative, enter -0-)			7,663	

Part II Balance Sheets

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

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments			
	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 (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	407,948	429,035	530,562
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	407,948	429,035	530,562
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 (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)		0	
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	407,948	429,035	
	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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see page 17 of the instructions)	407,948	429,035	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	407,948	429,035	

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	407,948
2	Enter amount from Part I, line 27a	2	21,087
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	429,035
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	429,035

Part IV Capital Gains and Losses for Tax on Investment Income

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

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	17,209
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	-2

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	15,000	438,766	0 034187
2011	20,000	410,954	0 048667
2010	19,740	363,114	0 054363
2009	10,000	305,530	0 032730
2008	36,000	397,665	0 090528

2	**Total** of line 1, column (d).	2	0 260475
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 052095
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	490,122
5	Multiply line 4 by line 3.	5	25,533
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	247
7	Add lines 5 and 6.	7	25,780
8	Enter qualifying distributions from Part XII, line 4.	8	27,500

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	247
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	247
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	247
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013 — 6a		
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	
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	247
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** ▶ 0 **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 ▶ $ ______ **(2)** On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
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		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
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) ▶ ______			
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	Yes	
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	Yes	

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 ▶JAFFE & COMPANY CPAPA Telephone no ▶(904) 296-2630

Located at ▶6550 SAINT AUGUSTINE RD STE 104 JACKSONVILLE FL ZIP+4 ▶32217

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
SIDNEY J GEFEN 6740-109 EPPING FOREST WAY N WAYJACKSONVILL, FL 32217	PRESIDENT 1 00	0	0	0
BARBARA G JAFFE 6750-107 EPPING FOREST WAY N JACKSONVILL, FL 32217	SEC/TREA 1 00	0	0	0
LAWRENCE L JAFFE 6750-107 EPPING FOREST WAY N JACKSONVILLE, FL 32217	TRUSTEE 1 00	0	0	0

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

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

Total number of other employees paid over $50,000 ▶ 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 . . . . ▶	

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	497,586
b	Average of monthly cash balances	1b	0
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	497,586
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	497,586
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	7,464
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	490,122
6	**Minimum investment return.** Enter 5% of line 5	6	24,506

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	24,506
2a	Tax on investment income for 2013 from Part VI, line 5	2a	247		
b	Income tax for 2013 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	247
3	Distributable amount before adjustments Subtract line 2c from line 1			3	24,259
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	24,259
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	24,259

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	27,500
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	27,500
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	247
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	27,253

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				24,259
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.				
b Total for prior years 20___, 20___, 20___				
3 Excess distributions carryover, if any, to 2013				
a From 2008. 2,191				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				
f **Total** of lines 3a through e.	2,191			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 27,500				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2013 distributable amount.				24,259
e Remaining amount distributed out of corpus	3,241			
5 Excess distributions carryover applied to 2013 *(If an amount appears in column (d), the same amount must be shown in column (a).)*				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	5,432			
b Prior years' undistributed income Subtract line 4b from line 2b				
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.				
d Subtract line 6c from line 6b Taxable amount —see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
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)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . .	2,191			
9 **Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a	3,241			
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				
d Excess from 2012. . . .				
e Excess from 2013. . . . 3,241				

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))

SIDNEY AND LOIS GEFEN

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

NONE

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

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

a The name, address, and telephone number 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*				
UNITED WAY OF JACKSONVILLE 1301 RIVERPLACE BLVD SUITE 400 JACKSONVILLE,FL 32203		N/A	DONATION	10,000
JACKSONVILLE JEWISH CENTER 3662 CROWN POINT ROAD JACKSONVILLE,FL 32257		N/A	DONATION	5,000
CONGREGATION AHAVATH CHESED SAN JOSE BLVD JACKSONVILLE,FL 32217		N/A	DONATION	2,500
RIVER GARDEN FOUNDATION OLD ST AUGUSTINE RD JACKSONVILLE,FL 32217		N/A	DONATION	10,000
Total . . . . ▶ **3a**				27,500
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .					
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			14	17,209	
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). .				17,209	

13 **Total.** Add line 12, columns (b), (d), and (e). 13 17,209

(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

******	2014-02-15	******
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
LAWRENCE L JAFFE CPA				

Firm's name	JAFFE & COMPANY CPA PA	Firm's EIN
Firm's address	6550 ST AUGUSTINE RD STE 104 JACKSONVILLE, FL 322172847	Phone no (904) 296-2630

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
VANGUARD TOTAL BOND MKT, COM STK, 155 SHS	P	2011-08-12	2013-02-04
ISHARES IBOXX INVEST GR COR FD, COM STK,108 SHS	P	2009-07-01	2013-03-11
ISHARES BARCLAYS TIPS BD FD, COM STK,54 SHS	P	2004-03-12	2013-06-13
ISHARES MSCI EAFE FD, COM STK,16 SHS	P	2004-02-02	2013-06-13
ISHARES S&P 500 GRWTH INDEX, COM STK, 8 SHS	P	2004-02-06	2013-06-13
ISHARES S&P 500 VALUE INDEX, COM STK, 10 SHS	P	2004-02-06	2013-06-13
ISHARES S&P MID CAP 400 GRWTH INDEX, COM STK, 8 SHS	P	2004-03-12	2013-06-13
ISHARES S&P MID CAP 400 VALUE INDEX, COM STK, 7 SHS	P	2006-02-09	2013-06-13
ISHARES S&P SMALL CAP 600 VALUE INDEX, COM STK, 8 SHS	P	2006-02-09	2013-06-13
ISHARES S&P SMALL CAP 600 GROWTH INDEX, COM STK, 8 SHS	P	2004-03-12	2013-06-13
POWERSHARES DB COM TRK INC, COM STK, 15 SHS	P	2009-07-01	2013-06-13
SPDR BARCLAYS CAPITAL HIGH YIE, COM STK, 4 SHS	P	2010-07-09	2013-06-13
VANGUARD FTSE EMERGING MKTS, COM STK, 10 SHS	P	2010-07-09	2013-06-13
VANGUARD REIT ETF, COM STK, 12 SHS	P	2009-01-12	2013-06-13
DOUBLELINE TOTAL RETURN, COM STK, 49 911 SHS	P	2012-07-26	2013-06-13
METROPOLITAN WEST TOT RET BD, COM STK, 9 981 SHS	P	2012-07-26	2013-06-13
PIMCO TOTAL RETURN ETF, COM STK, 3 SHS	P	2013-02-04	2013-06-13
POWERSHARES SENIOR LOAN PORT, COM STK, 10 SHS	P	2012-10-24	2013-06-13
TCW EMERG MKTS INCOME, COM STK, 29 85 SHS	P	2012-07-26	2013-06-13
TRMPLETON GLOBAL BD FD, COM STK, 19 939 SHS	P	2012-07-26	2013-06-13
WISDOMTREE TRUST EMERG MKT FQT, COM STK, 8 SHS	P	2012-07-31	2013-06-13
ISHARES S&P 500 VALUE ETF, COM STK, 26 SHS	P	2004-02-06	2013-07-31
ISHARES S&P MID CAP 400 G ETF, COM STK, 19 SHS	P	2004-03-12	2013-07-31
ISHARES S&P MID CAP 400 V ETF, COM STK, 34 SHS	P	2006-02-09	2013-07-31
ISHARES S&P SMALL CAP 600 VALUE ETF, COM STK, 8 SHS	P	2006-02-09	2013-07-31
ISHARES S&P SMALL CAP 600 G ETF, COM STK, 30 SHS	P	2004-03-12	2013-07-31
SPDR BARCLAYS CAPITAL HIGH YIE, COM STK, 157 SHS	P	2010-07-09	2013-07-25
POWERSHARES SENIOR LOAN PORT, COM STK, 490 SHS	P	2012-10-24	2013-07-31
TCW EMERG MKTS INCOME, COM STK, 22 38 SHS	P	2012-07-26	2013-06-13
ISHARES MSCI EAFT ETF, COM STK,40 SHS	P	2004-02-02	2013-08-08

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
ISHARES S&P 500 GRWTH ETF,COM STK,8 SHS	P	2004-02-06	2013-08-08
ISHARES S&P 500 VAL ETF,COM STK,37 SHS	P	2004-02-06	2013-08-08
ISHARES S&P MID-CAP 400 G ETF,COM STK,26 SHS	P	2004-03-12	2013-08-08
POWERSHARES BD COM TRK INC, COM STK, 697 SHS	P	2009-07-01	2013-08-24
POWERSHARES BD COM TRK INC, COM STK, 155 SHS	P	2013-08-08	2013-09-24
METROPOLITAN WEST TOT RET BD,COM STK,2407 22 SHS	P	2012-07-26	2013-12-18
MONDELEZ INTL INC, COM STK, 124 SHS	P	2007-01-16	2013-12-24
METROPOLITAN WEST TOT RET BD,COM STK,93 861 SHS	P	2013-01-31	2013-12-18

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
12,910	0	12,669	241
12,836	0	11,070	1,766
6,231	0	5,745	486
960	0	738	222
683	0	458	225
769	0	567	202
782	0	365	417
713	0	522	191
751	0	554	197
778	0	364	414
390	0	337	53
160	0	154	6
399	0	404	-5
828	0	356	472
562	0	565	-3
107	0	108	-1
322	0	328	-6
249	0	248	1
263	0	268	-5
261	0	258	3
409	0	415	-6
2,085	0	1,474	611
2,608	0	1,194	1,414
3,680	0	2,536	1,144
4,307	0	2,977	1,330
3,135	0	1,702	1,433
6,329	0	6,028	301
12,212	0	12,208	4
197	0	201	-4
2,470	0	1,857	613

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
714	0	458	256
2,971	0	2,098	873
1,529	0	417	1,112
17,919	0	16,156	1,763
3,985	0	3,954	31
25,444	0	26,103	-659
5,026	0	2,893	2,133
992	0	1,008	-16

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
0	0	0	241
0	0	0	1,766
0	0	0	486
0	0	0	222
0	0	0	225
0	0	0	202
0	0	0	417
0	0	0	191
0	0	0	197
0	0	0	414
0	0	0	53
0	0	0	6
0	0	0	-5
0	0	0	472
0	0	0	-3
0	0	0	-1
0	0	0	-6
0	0	0	1
0	0	0	-5
0	0	0	3
0	0	0	-6
0	0	0	611
0	0	0	1,414
0	0	0	1,144
0	0	0	1,330
0	0	0	1,433
0	0	0	301
0	0	0	4
0	0	0	-4
0	0	0	613

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
0	0	0	256
0	0	0	873
0	0	0	1,112
0	0	0	1,763
0	0	0	31
0	0	0	-659
0	0	0	2,133
0	0	0	-16

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Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 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
SIDNEY AND LOIS GEFEN FAMILY FOUNDATION INC

Employer identification number
59-2610691

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 foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☑ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for 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 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 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization	Employer identification number
SIDNEY AND LOIS GEFEN FAMILY FOUNDATION INC	59-2610691

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	SIDNEY GEFEN 6740 EPPING FOREST WAY N JACKSONVILLE, FL 32217	$ 24,388	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)

Name of organization	Employer identification number
SIDNEY AND LOIS GEFEN FAMILY FOUNDATION INC	59-2610691

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization
SIDNEY AND LOIS GEFEN FAMILY FOUNDATION INC

Employer identification number
59-2610691

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 See instructions) ▶ $
Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

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

(a) No. from 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

TY 2013 All Other Program Related Investments Schedule

Name: SIDNEY AND LOIS GEFEN FAMILY FOUNDATION INC

EIN: 59-2610691

Category	Amount
NONE	

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

TY 2013 Gain/Loss from Sale of Other Assets Schedule

Name: SIDNEY AND LOIS GEFEN FAMILY FOUNDATION INC

EIN: 59-2610691

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
155 SHS VANGUARD TOTAL BOND MARKET	2011-08	Donated	2013-02		12,910	12,669			241	
108 SHS ISHARES IBOXX INVEST GR COR FD	2009-07	Donated	2013-03		12,836	11,070			1,766	
54 SHS ISHARES BARCLAYS TIPS BD FD	2004-03	Purchased	2013-06		6,231	5,745			486	
16 SHS ISHARES MSCI EAFE FUND	2004-02	Purchased	2013-06		960	738			222	
8 SHS ISHARES S&P 500 GRWTH INDEX	2004-02	Purchased	2013-06		683	458			225	
10 SHS ISHARES S&P 500 VALUE INDEX	2004-02	Purchased	2013-06		769	567			202	
8 SHS ISHARES S&P MID CAP 400 GRWTH INDEX	2004-03	Purchased	2013-06		782	365			417	
7 SHS ISHARES S&P MID CAP 400 VALUE INDEX	2006-02	Purchased	2013-06		713	522			191	
7 SHS ISHARES S&P MID CAP 400 VALUE INDEX	2006-02	Purchased	2013-06		751	554			197	
8 SHS ISHARES SMALL CAP 600 GROWTH INDEX	2004-03	Purchased	2013-06		778	364			414	
15 SHS POWERSHARES DB COMM TRK INC	2009-07	Purchased	2013-06		390	337			53	
4 SHS SPDR BARCLAYS CAPITAL HIGH YIE	2010-07	Purchased	2013-06		160	154			6	
10 SHS VANGUARD FTSE EMERGING MARKETS	2010-07	Purchased	2013-06		399	404			-5	
12 SHS VANGUARD REIT ETF	2009-01	Purchased	2013-06		828	356			472	
49 911 SHS DOUBLELINE TOTAL RETURN	2012-07	Purchased	2013-06		562	565			-3	
9 981 METROPOLITAN WEST TOT RET BD	2012-07	Purchased	2013-06		107	108			-1	
3 SHS PIMCO TOTAL RETURN ETF	2013-02	Purchased	2013-06		322	328			-6	
10 SHS POWERSHARS SENIOR LOAN PORT	2012-10	Purchased	2013-06		249	248			1	
29 85 SHS TCW EMERG MKTS INCOME	2012-07	Purchased	2013-06		263	268			-5	
19 939 SHS TEMPLETON GLOBAL BD FD	2012-07	Purchased	2013-06		261	258			3	
8 SHS WISDOMTREE TRUST EMERG MKT FQT	2012-07	Purchased	2013-06		409	415			-6	
26 SHS ISHARES S&P 500 VAL ETF	2004-02	Purchased	2013-07		2,085	1,474			611	
19 SHS ISHARES S&P MID-CAP 400 G ETF	2004-03	Purchased	2013-07		2,608	1,194			1,414	
34 SHS ISHARES S&P MID-CAP 400 V ETF	2006-02	Purchased	2013-07		3,680	2,536			1,144	
43 SHS ISHARES S&P SMLL-CAP 600 V ETF	2006-02	Purchased	2013-07		4,307	2,977			1,330	
30 SHS ISHARES S&P SMALL CAP 600 G ETF	2004-03	Purchased	2013-07		3,135	1,702			1,433	
157 SHS SPDR BARCLAYS CAPITAL HIGH YIE	2010-07	Purchased	2013-07		6,329	6,028			301	
490 SHS POWERSHARS SENIOR LOAN PORT	2012-10	Purchased	2013-07		12,212	12,208			4	
22 380 TCW EMERG MKTS INCOME	2012-07	Purchased	2013-06		197	201			-4	
40 SHS ISHARES MSCI EAFT ETF	2004-02	Purchased	2013-08		2,470	1,857			613	

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
8 SHS ISHARES S&P 500 GRWTH ETF	2004-02	Purchased	2013-08		714	458			256	
37 SHS ISHARES S&P 500 VAL ETF	2004-02	Purchased	2013-08		2,971	2,098			873	
26 SHS ISHARES S&P MID-CAP 400 G ETF	2004-03	Purchased	2013-08		1,529	417			1,112	
697 SHS POWERSHARES DB COMM TRK INC	2009-07	Purchased	2013-08		17,919	16,156			1,763	
155 SHS POWERSHARES DB COMM TRK INC	2013-08	Purchased	2013-09		3,985	3,954			31	
2407 220 SHS METROPOLITAN WEST TOT RET BD	2012-07	Purchased	2013-12		25,444	26,103			-659	
145 SHS MONDELEZ INTL INC	2007-01	Donated	2013-12		5,026	2,893			2,133	
93 861 SHS METROPOLITAN WEST TOT RET BD	2013-01	Purchased	2013-12		992	1,008			-16	

TY 2013 General Explanation Attachment

Name: SIDNEY AND LOIS GEFEN FAMILY FOUNDATION INC

EIN: 59-2610691

Identifier	Return Reference	Explanation
	PART VII-A LINE 10, SUBSTANTIAL CONTRIBUTORS	SIDNEY GEFEN 6740 EPPING FOREST WAY JACKSONVILLE, FL 32217

TY 2013 Other Expenses Schedule

Name: SIDNEY AND LOIS GEFEN FAMILY FOUNDATION INC

EIN: 59-2610691

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INCOME TAX	547			
BROKERS FEES	4,877	4,877	4,877	

TY 2013 Taxes Schedule

Name: SIDNEY AND LOIS GEFEN FAMILY FOUNDATION INC

EIN: 59-2610691

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CORP TAX	61	61		

TY 2013 IRS Payment

Name:	SIDNEY AND LOIS GEFEN FAMILY FOUNDATION INC
EIN:	59-2610691
Routing Transit Number:	044000804
Bank Account Number:	8902021726594
Type of Account:	Checking
Payment Amount in Dollars and Cents:	247
Requested Payment Date:	2014-03-15
Taxpayer's Daytime Phone Number:	(904) 296-2630