4508

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

OMB No 1545-0052
2013
Open to Public Inspection

For calendar year 2013 or tax year beginning , and ending

Name of foundation
Sylvia Carmel Schlanger & I. Robert Schlanger Charitable Foundation

A Employer identification number
65-6201791

Number and street (or P O box number if mail is not delivered to street address)
100 W. Cypress Creek Rd, Suite 700

Room/suite

B Telephone number (see instructions)
206-780-9033

City or town, state or province, country, and ZIP or foreign postal code
Ft. Lauderdale FL 33309

C If exemption application is pending, check here ▶ ☐ n/a

D 1 Foreign organizations, check here ▶ ☐

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

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

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

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

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 1,111,247

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

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)				
	2	Check ▶ ☒ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	10,336	31	10,336	
	4	Dividends and interest from securities	39,574	39,574	39,574	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10 Stmt 1	55,068			
	b	Gross sales price for all assets on line 6a 239,195				
	7	Capital gain net income (from Part IV, line 2)		0		
	8	Net short-term capital gain			0	
	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) Stmt 2	-3,040		-3,040	
	12	**Total.** Add lines 1 through 11	101,938	39,605	46,870	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	18,496			
	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				
	18	Taxes (attach schedule) (see instructions)				
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (att sch) Stmt 3	150		150	
	24	**Total operating and administrative expenses.** Add lines 13 through 23	18,646	0	150	0
	25	Contributions, gifts, grants paid	51,000			51,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	69,646	0	150	51,000
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	32,292			
	b	**Net investment income** (if negative, enter -0-)		39,605		
	c	**Adjusted net income** (if negative, enter -0-)			46,720	

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For Paperwork Reduction Act Notice, see instructions.

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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	280,189	79,788	78,788
	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 (att schedule) ▶			
		Less allowance for doubtful accounts ▶ 0			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	707	707	707
	10a	Investments – U S and state government obligations (attach schedule) Stmt 4	50,251	48,051	6,773
	b	Investments – corporate stock (attach schedule) See Stmt 5	395,152	590,935	661,055
	c	Investments – corporate bonds (attach schedule) See Stmt 6	362,025	280,000	249,328
	11	Investments – land buildings, and equipment basis ▶			
		Less accumulated depreciation (attach sch) ▶			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule) See Statement 7		121,942	114,596
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach sch) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers – see the instructions Also, see page 1, item I)	1,088,324	1,121,423	1,111,247
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	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			
	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	1,088,324	1,121,423	
	30	**Total net assets or fund balances** (see instructions)	1,088,324	1,121,423	
	31	**Total liabilities and net assets/fund balances** (see instructions)	1,088,324	1,121,423	

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	1,088,324
2	Enter amount from Part I, line 27a	2	32,292
3	Other increases not included in line 2 (itemize) ▶ See Statement 8	3	807
4	Add lines 1, 2, and 3	4	1,121,423
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	1,121,423

Form 990-PF (2013) Sylvia Carmel Schlanger & I. Robert 65-6201791

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	N/A			
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				
b				
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k) but not less than -0-) or Losses (from col (h))
a				
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

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 } 3

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see 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	60,000	1,110,396	0.054035
2011	44,000	1,049,878	0.041910
2010	50,000	997,524	0.050124
2009	45,000	876,829	0.051321
2008	52,000	1,007,690	0.051603

2	Total of line 1, column (d)	2	0.248993
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	0.049799
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	1,058,875
5	Multiply line 4 by line 3	5	52,731
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	396
7	Add lines 5 and 6	7	53,127
8	Enter qualifying distributions from Part XII, line 4	8	51,000

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

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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	792
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	792
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	792
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013 — 6a: 307		
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	307
8	Enter any **penalty** for underpayment of estimated tax Check here [X] if Form 2220 is attached	8	7
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	492
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		X
	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		X
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		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	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		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?	6	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	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ FL			
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	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	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities (continued)

			Yes	No
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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ Andy Carmel Telephone no ▶ 206-780-9033
4304 NE 60th Street
Located at ▶ Seattle WA ZIP+4 ▶ 98115

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year n/a ▶ | 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? 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		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)?	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))				
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years ▶ 20 , 20 , 20 , 20	☐ Yes ☒ No			
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)	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 ▶ 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)	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

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)? N/A | 5b |

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945–5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | 6b | | X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A | 7b |

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

1 List all officers, directors, trustees, foundation managers and their compensation (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
David B. Carmel 4304 NE 60th Street	Seattle WA 98115	10.00	8,500	0	0
Gene K. Glasser 100 Cypress Creek Rd #700	Ft. Lauderdale FL 33309	10.00	9,996	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 ▶		

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 (see instructions)

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 ▶	

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	920,000
b	Average of monthly cash balances	1b	155,000
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	1,075,000
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	1,075,000
4	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see instructions)	4	16,125
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,058,875
6	**Minimum investment return.** Enter 5% of line 5	6	52,944

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	52,944
2a	Tax on investment income for 2013 from Part VI, line 5 — 2a: 792		
b	Income tax for 2013. (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	792
3	Distributable amount before adjustments Subtract line 2c from line 1	3	52,152
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	52,152
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	52,152

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	51,000
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	51,000
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	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	51,000

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					52,152
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					
b From 2009	1,186				
c From 2010	897				
d From 2011					
e From 2012	4,880				
f **Total** of lines 3a through e		6,963			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 51,000					
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					51,000
e Remaining amount distributed out of corpus					
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))		1,152			1,152
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		5,811			
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)					
9 **Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a		5,811			
10 Analysis of line 9					
a Excess from 2009	34				
b Excess from 2010	897				
c Excess from 2011					
d Excess from 2012	4,880				
e Excess from 2013					

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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
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 foundation 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))

N/A

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

N/A

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

Check here ▶ [X] 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 or e-mail address of the person to whom applications should be addressed

N/A

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

N/A

c Any submission deadlines

N/A

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

N/A

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				
University of Washington Foundation PO Box 359504 Seattle WA 98195		Public Chari	Contribution	20,000
Jewish Federation of Broward County 5890 S Pine Island Road Plantation FL 33328		Public Chari	Contribution	5,000
Swedish Medical Center 747 Broadway Seattle WA 98122		Public Chari	Contribution	23,000
Memorial Hospital Foundation 3711 Garfield St. Hollywood FL 33021		Public Chari	Contribution	3,000
Total			▶ 3a	51,000
b Approved for future payment N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	10,336	
4 Dividends and interest from securities			14	39,574	
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			17	59,418	-4,350
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b Plains All American Pipeline			1	-304	
c Buckeye Partners			1	-667	
d Energy Transfer Partners			1	-384	
e Kinder Morgan Energy Partners			1	-1,685	
12 Subtotal Add columns (b), (d), and (e)		0		106,288	-4,350

13 Total. Add line 12, columns (b), (d), and (e) 13 101,938

(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)
N/A	

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)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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
N/A			

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
N/A		

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) is based on all information of which preparer has any knowledge

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

Signature of officer or trustee: [signature] Date: 4/30/14 Title: Trustee

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed
Charles J. Hirsh	[signature]	4/30/2014	

Firm's name ▶	Hirsh and Company, CPA's	PTIN	P00047407
Firm's address ▶	7990 SW 117th Ave Ste 215	Firm's EIN ▶	59-2161649
	Miami, FL 33183-4865	Phone no	305-595-7100

DAA

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65-6201791
FYE: 12/31/2013

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Description: Whom Sold	Date Acquired	Date Sold	How Received	Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
281 Sh General Electric Cap CLD	6/13/02	1/02/13	Purchase	$ 7,025	$ 7,025	$	$	$
Return of Prin - GNM P412411X	Various	1/15/13	Purchase	7	7			
Return of Prin -GNM P247755X	Various	1/15/13	Purchase	13	13			
Return of Prin -GNM P002059M	Various	1/22/13	Purchase	4	4			
Return of Prin -GNM P002099M	Various	1/22/13	Purchase	12	12			
Return of Prin -GNM P412411X	Various	2/15/13	Purchase	7	7			
Return of Prin -GNM P247755X	Various	2/15/13	Purchase	14	14			
876 Sh Public Storage	8/22/06	2/19/13	Purchase	135,727	76,309			59,418
Return of Prin -GNM P002059M	Various	2/20/13	Purchase	4	4			
Return of Prin -GNM P002099M	Various	2/20/13	Purchase	12	12			
Return of Prin -GNM P412411X	Various	3/15/13	Purchase	7	7			
Return of Prin -GNM P247755X	Various	3/15/13	Purchase	14	14			
Return of Prin -GNM P002059M	Various	3/20/13	Purchase	4	4			
Return of Prin -GNM P002099M	Various	3/20/13	Purchase	44	44			
67000 Sh GNM P412411X	4/20/05	4/15/13	Purchase	1,418	1,418			
Return of Prin -GNM P247755X	Various	4/15/13	Purchase	14	14			
Return of Prin -GNM P002059M	Various	4/22/13	Purchase	4	4			

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets (continued)

Description / Whom Sold	Date Acquired	Date Sold	How Received / Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
Return of Prin -GNM P002099M	Various	4/22/13	Purchase $ 95	$ 95	$	$	$
2000 Sh JP Morgan Chase CAP CLD	1/25/02	5/08/13	Purchase 50,000	50,000			
Return of Prin -GNM P247755X	Various	5/15/13	Purchase 14	14			
Return of Prin -GNM P002059M	Various	5/20/13	Purchase 4	4			
Return of Prin -GNM P002099M	Various	5/20/13	Purchase 49	49			
Return of Prin -GNM P247755X	Various	6/17/13	Purchase 14	14			
1000 Sh American Intl Group	5/29/07	6/17/13	Purchase 25,000	25,000			
REturn of Prin -GNM P002059M	Various	6/20/13	Purchase 4	4			
Return of Prin -GNM P002099M	Various	6/20/13	Purchase 62	62			
Return of Prin -GNM P247755X	Various	7/15/13	Purchase 14	14			
Return of Prin -GNM P002059M	Various	7/22/13	Purchase 4	4			
Return of Prin -GNM P002099M	Various	7/22/13	Purchase 10	10			
Return of Prin -GNM P247755X	Various	8/15/13	Purchase 14	14			
Return of Prin -GNM P002059M	Various	8/20/13	Purchase 4	4			
Return of Prin -GNM P002099M	Various	8/20/13	Purchase 10	10			
Return of Prin -GNM P247755X	Various	9/16/13	Purchase 14	14			
Return of Prin -GNM P002059M	Various	9/20/13	Purchase 12	12			

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets (continued)

Description / Whom Sold	Date Acquired	Date Sold	How Received / Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
Return of Prin -GNM P002099M	Various	9/20/13	Purchase $ 32	$ 32	$	$	$
Return of Prin -GNM P247755X	Various	10/15/13	Purchase 14	14			
Return of Prin -GNM P002059M	Various	10/21/13	Purchase 54	54			
Return of Prin -GNM P002099M	Various	10/21/13	Purchase 45	45			
Return of Prin -GNM P247755X	Various	11/15/13	Purchase 14	14			
Return of Prin -GNM P002059M	Various	11/20/13	Purchase 49	49			
Return of Prin -GNM P002099M	Various	11/20/13	Purchase 64	64			
Return of Prin -GNM P247755X	Various	12/16/13	Purchase 14	14			
500 Sh SPDR S&P Emerging MKTS Divid	2/13/13	12/17/13	Purchase 19,242	23,592			-4,350
Return of Prin -GNM P002059M	Various	12/20/13	Purchase 3	3			
Return of Prin -GNM P002099M	Various	12/20/13	Purchase 10	10			
Total			$ 239,195	$ 184,127	$ 0	$ 0	$ 55,068

Federal Statements

Statement 2 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
Plains All American Pipeline	$ -304	$	$ -304
Buckeye Partners	-667		-667
Energy Transfer Partners	-384		-384
Kinder Morgan Energy Partners	-1,685		-1,685
Total	$ -3,040	$ 0	$ -3,040

Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
	$	$	$	$
Expenses				
Bank Fees	150		150	
Total	$ 150	$ 0	$ 150	$ 0

Statement 4 - Form 990-PF, Part II, Line 10a - US and State Government Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
GNMA #2411	$ 2,721	$ 1,281	Cost	$
GNMA #7755	22,810	22,643	Cost	3,738
GNMA #2059	5,667	5,518	Cost	715
GNMA #2099	19,053	18,609	Cost	2,320
Total	$ 50,251	$ 48,051		$ 6,773

Federal Statements

Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
600 Sh Altria Group Inc	$	$ 21,080	Cost	$ 23,034
200 Sh Altria Group Inc		7,173	Cost	7,678
1400 Sh Intel Corp	46,076	46,076	Cost	36,337
400 Sh IBM	54,220	54,220	Cost	75,028
265 Sh AT&T	28,427	28,427	Cost	9,317
235 Sh AT&T		8,444	Cost	8,263
300 Sh AT&T		10,500	Cost	10,548
600 Sh BP PLC		25,769	Cost	29,166
823 Sh Comcast	47,581	47,581	Cost	42,767
600 Sh Centurylink Inc		25,227	Cost	19,110
200 Sh Centurylink Inc		6,600	Cost	6,370
600 Sh Glaxosmithkline PLC		27,645	Cost	32,034
400 Sh Health Care Reit Inc		25,389	Cost	21,428
300 Sh Kimberly Clark	21,140	21,140	Cost	31,338
200 Sh Energy Bridge Partners	6,159	6,159	Cost	5,974
600 Sh Energy Bridge Partners	18,481	18,481	Cost	17,922
400 Sh Plains All American Pipe Line	26,696	26,696	Cost	41,416
33 Sh Kraft Foods	1,238	1,238	Cost	1,779
133 Sh Kraft Foods	4,991	4,991	Cost	7,170
434 Sh Kraft Foods		20,496	Cost	23,397
100 Sh Mondelez International	2,314	2,314	Cost	3,530
400 Sh Mondelez International	9,255	9,255	Cost	14,120
600 Sh Public Storage	128,574	52,266	Cost	90,312
200 Sh Philip Morris Intl Inc		18,302	Cost	17,426
100 Sh Philip Morris Intl Inc		8,909	Cost	8,713
500 Sh Buckeye Partners L P		27,518	Cost	35,505
300 Sh Kinder Morgan Egy Partners LP		23,784	Cost	24,198
300 Sh Energy Transfer Ptnrs LP		15,255	Cost	17,175
Total	$ 395,152	$ 590,935		$ 661,055

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Statement 6 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
2000 Sh JP Morgan Chase	$ 50,000	$	Cost	$
1600 Sh Royal Bank of Scotland	40,000	40,000	Cost	32,736
1600 Sh Aegon NV	40,000	40,000	Cost	37,456
1600 Sh Bac Capital Trust	40,000	40,000	Cost	39,776
1600 Sh Bank of America	40,000	40,000	Cost	37,200
1600 Sh Barclays Bank	40,000	40,000	Cost	38,624
1200 Sh Citigroup Capital	30,000	30,000	Cost	29,856
1000 Sh Aegon NV	25,000	25,000	Cost	23,590
1000 Sh American Intl	25,000		Cost	
1000 Sh FNMA Preferred Series T	25,000	25,000	Cost	10,090
281 Sh GE Capital	7,025		Cost	
Total	$ 362,025	$ 280,000		$ 249,328

Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
700 Sh Cohen and Steers Quality	$	$ 7,134	Cost	$ 6,636
1200 Sh ING Prime Rate TR		7,329	Cost	6,984
800 Sh Powershares Global Exchange		24,680	Cost	21,600
250 Sh Ishares Iboxx$ High Yield		23,489	Cost	23,220
1800 Sh Powershares Preferred Portfo		26,994	Cost	24,192
1000 Sh Powershares Exchange Traded		25,306	Cost	24,880
400 Sh Allianzgi NFJ Divid Interest		7,010	Cost	7,084
Total	$ 0	$ 121,942		$ 114,596

Federal Statements

Statement 8 - Form 990-PF, Part III, Line 3 - Other Increases

Description	Amount
Fund Adjustment	$ 807
Total	$ 807