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Form **990-PF****Return of Private Foundation**

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

OMB No 1545-0052

**2013**

Open to Public Inspection

Department of the Treasury  
Internal Revenue ServiceDo 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](http://www.irs.gov/form990pf).

For calendar year 2013 or tax year beginning

, and ending

Name of foundation

JUNE BAUMGARDNER GELBART FOUNDATION

A Employer identification number

65-6390197

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

C/O SUNTRUST BANK P O BOX 1908

B Telephone number (see instructions)

(407) 237-4500

City or town

State

ZIP code

ORLANDO

FL

32802-1908

Foreign country name

Foreign province/state/country

Foreign postal code

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) \$ 5,468,065

J Accounting method: ☒ Cash ☐ Accrual☐ Other (specify)

(Part I, column (d) must be on cash basis.)

C If exemption application is pending, check here ☐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 ☐**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)
1 Contributions, gifts, grants, etc., received (attach schedule)			
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B			
3 Interest on savings and temporary cash investments			
4 Dividends and interest from securities	76,178	78,374	
5a Gross rents			
b Net rental income or (loss)			
6a Net gain or (loss) from sale of assets not on line 10	276,206		
b Gross sales price for all assets on line 6a 1,511,762			
7 Capital gain net income (from Part IV, line 2)		276,206	
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)	10,589	10,589	
12 Total. Add lines 1 through 11	362,973	365,169	0
13 Compensation of officers, directors, trustees, etc	86,367	43,184	43,184
14 Other employee salaries and wages			
15 Pension plans, employee benefits			
16a Legal fees (attach schedule)	2,839		2,839
b Accounting fees (attach schedule)			
c Other professional fees (attach schedule)	22,770		22,770
17 Interest			
18 Taxes (attach schedule) (see instructions)	1,249	1,249	
19 Depreciation (attach schedule) and depletion			
20 Occupancy			
21 Travel, conferences, and meetings	24,381		24,381
22 Printing and publications			
23 Other expenses (attach schedule)	20,542		20,542
24 Total operating and administrative expenses.			
Add lines 13 through 23	158,148	44,433	0
25 Contributions, gifts, grants paid	266,000		266,000
26 Total expenses and disbursements. Add lines 24 and 25	424,148	44,433	0
27 Subtract line 26 from line 12			
a Excess of revenue over expenses and disbursements	-61,175		
b Net investment income (if negative, enter -0-)		320,736	
c Adjusted net income (if negative, enter -0-)			0

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2013)

HTA

2014

ENVELOPE  
POSTMARK DATE: NOV 14 2014

SCANNED NOV 20 2014

Form 990-PF (2013) JUNE BAUMGARDNER GELBART FOUNDATION

65-6390197

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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	519		
	2	Savings and temporary cash investments	173,900	55,144	55,144
	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)	2,974,527		
	c	Investments—corporate bonds (attach schedule)	949,155		
	11	Investments—land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	646,514	4,954,186	5,412,921
	14	Land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶ )			
	16	<b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	4,744,615	5,009,330	5,468,065
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	<b>Total liabilities</b> (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		<b>Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/></b> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		<b>Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/></b> <b>and complete lines 27 through 31.</b>			
	27	Capital stock, trust principal, or current funds	4,744,615	5,009,330	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	<b>Total net assets or fund balances</b> (see instructions)	4,744,615	5,009,330	
	31	<b>Total liabilities and net assets/fund balances</b> (see instructions)	4,744,615	5,009,330	

## 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	4,744,615
2	Enter amount from Part I, line 27a	2	-61,175
3	Other increases not included in line 2 (itemize) ▶ See Attached Statement	3	325,890
4	Add lines 1, 2, and 3	4	5,009,330
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	5,009,330

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**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.)
<b>1a</b>	See Attached Statement			
<b>b</b>	See Attached Statement			
<b>c</b>	See Attached Statement			
<b>d</b>	See Attached Statement			
<b>e</b>	See Attached Statement			
(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)	
<b>a</b>			0	
<b>b</b>			0	
<b>c</b>			0	
<b>d</b>			0	
<b>e</b>			0	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV 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))	
<b>a</b>			0	
<b>b</b>			0	
<b>c</b>			0	
<b>d</b>			0	
<b>e</b>			0	
<b>2</b>	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 }		<b>2</b>	276,206
<b>3</b>	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 }		<b>3</b>	0

**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	337,904	4,919,327	0.068689
2011	369,918	5,345,564	0.069201
2010	371,440	4,920,121	0.075494
2009	269,838	4,904,437	0.055019
2008	447,769	5,795,662	0.077259
<b>2</b>	Total of line 1, column (d)		<b>2</b> 0.345662
<b>3</b>	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		<b>3</b> 0.069132
<b>4</b>	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5		<b>4</b> 4,742,967
<b>5</b>	Multiply line 4 by line 3		<b>5</b> 327,891
<b>6</b>	Enter 1% of net investment income (1% of Part I, line 27b)		<b>6</b> 3,207
<b>7</b>	Add lines 5 and 6		<b>7</b> 331,098
<b>8</b>	Enter qualifying distributions from Part XII, line 4 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		<b>8</b> 379,716

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

<b>1a</b>	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)	<b>1</b>	3,207
<b>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	0
<b>3</b>	Add lines 1 and 2	<b>3</b>	3,207
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	<b>5</b>	3,207
<b>6</b>	<b>Credits/Payments:</b>		
<b>a</b>	2013 estimated tax payments and 2012 overpayment credited to 2013	<b>6a</b>	5,671
<b>b</b>	Exempt foreign organizations—tax withheld at source	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	8,750
<b>d</b>	Backup withholding erroneously withheld	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d	<b>7</b>	14,421
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	<b>9</b>	0
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	<b>10</b>	11,214
<b>11</b>	Enter the amount of line 10 to be: <b>Credited to 2014 estimated tax</b> 11,214 <b>Refunded</b>	<b>11</b>	0

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? <i>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</i>		X
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?		X
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ► \$ _____ (2) On foundation managers ► \$ _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ _____		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>		X
<b>3</b> 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? <i>If "Yes," attach a conformed copy of the changes</i>		X
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?		N/A
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>		X
<b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	X	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) ► FL		
<b>b</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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>		X
<b>9</b> 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)? <i>If "Yes," complete Part XIV</i>		X
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		X

**Part VII-A Statements Regarding Activities (continued)**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	X	
14	The books are in care of ▶ SUNTRUST BANK Telephone no ▶ (407) 237-4500 Located at ▶ P.O. BOX 1908 ORLANDO FL ZIP+4 ▶ 32802-1908			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ▶	16	Yes	No X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>	1b	X
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions) <input type="checkbox"/>	2b	N/A
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

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

- 5a** During the year did the foundation pay or incur any amount to:
- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (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)? ☐ Yes ☒ No
- 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) N/A
- 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? ☐ Yes ☒ 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? ☐ Yes ☒ No

5b N/A

6b X

7b N/A

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (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
NORMAN LIPOFF C/O SUNTRUST BANK, P O BOX 1908 ORLANDO, F	TRUSTEE 5 00	25,199		
MARC A B SILVERMAN C/O SUNTRUST BANK, P O BOX 1908 ORLANDO, F	TRUSTEE 5 00	25,199		
SUNTRUST BANK P.O BOX 1908 ORLANDO, FL 32802-1908	CORPORATE TRU 5 00	13,041		
BESSEMER TRUST	PRIOR TRUSTEE	22,928		

**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

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**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)***3 Five highest-paid independent contractors for professional services (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		
<b>Total number of others receiving over \$50,000 for professional services</b>		<b>0</b>

**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 NONE	
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 NONE	
2	
All other program-related investments. See instructions	
3 NONE	
<b>Total. Add lines 1 through 3</b>	<b>0</b>

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	4,742,256
<b>b</b>	Average of monthly cash balances	<b>1b</b>	72,939
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	4,815,195
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	4,815,195
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	<b>4</b>	72,228
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	4,742,967
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	237,148

**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)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	237,148
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5	<b>2a</b>	3,207
<b>b</b>	Income tax for 2013. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	3,207
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	233,941
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	233,941
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	233,941

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	<b>1a</b>	379,716
<b>b</b>	Program-related investments—total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	379,716
<b>5</b>	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)	<b>5</b>	3,207
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	376,509

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

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JUNE BAUMGARDNER GELBART FOUNDATION

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

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
<b>1</b> Distributable amount for 2013 from Part XI, line 7				233,941
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only			0	
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2013				
<b>a</b> From 2008	135,268			
<b>b</b> From 2009	269,838			
<b>c</b> From 2010	374,653			
<b>d</b> From 2011	107,390			
<b>e</b> From 2012	94,878			
<b>f</b> Total of lines 3a through e	982,027			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 379,716				
<b>a</b> Applied to 2012, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions)				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions)				
<b>d</b> Applied to 2013 distributable amount				233,941
<b>e</b> Remaining amount distributed out of corpus	145,775			
<b>5</b> Excess distributions carryover applied to 2013. (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,127,802			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0		
<b>c</b> 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				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions				
<b>e</b> Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
<b>f</b> Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	135,268			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	992,534			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2009	269,838			
<b>b</b> Excess from 2010	374,653			
<b>c</b> Excess from 2011	107,390			
<b>d</b> Excess from 2012	94,878			
<b>e</b> Excess from 2013	145,775			

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

**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)

**2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2013	(b) 2012	(c) 2011	(d) 2010	
				0
<b>b</b> 85% of line 2a				0
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed				0
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities				0
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				0
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:				
<b>a</b> "Assets" alternative test—enter:				
<b>(1)</b> Value of all assets				0
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)				0
<b>b</b> "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed				0
<b>c</b> "Support" alternative test—enter:				
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)				0
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				0
<b>(3)</b> Largest amount of support from an exempt organization				0
<b>(4)</b> Gross investment income				0

**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 ☐ 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:

NORMAN LIPOFF, ESQ GREENBERG TRAURIG, P A 1221 BRICKELL AVENUE MIAMI, FL 33131 (305) 579-0500

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

SEE ATTACHED APPLICATION FORM AND GRANT PROPOSAL FORMAT MEMO

- c** Any submission deadlines

DECEMBER 31 OF THE YEAR PRIOR TO THE YEAR OF THE GRANT

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

SEE GRANT PROPOSAL FORMAT MEMO FOR RESTRICTIONS.

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JUNE BAUMGARDNER GELBART FOUNDATION

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Page **11****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
<b>a</b> Paid during the year See Attached Statement				
<b>Total</b>			<b>3a</b>	266,000
<b>b</b> Approved for future payment NONE				
<b>Total</b>			<b>3b</b>	0

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**Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

Name

AMERICAN FRIENDS OF THE JAFFA INST

Street

City	State	Zip Code	Foreign Country
Relationship NONE	Foundation Status PC		
Purpose of grant/contribution GENERAL CHARITABLE PURPOSES			Amount 9,000

Name

AMERICAN FRIENDS OF OR NATIONAL MISS

Street

City	State	Zip Code	Foreign Country
Relationship NONE	Foundation Status PC		
Purpose of grant/contribution GENERAL CHARITABLE PURPOSES			Amount 2,000

Name

CAMP JUDAEA INC

Street

City	State	Zip Code	Foreign Country
Relationship NONE	Foundation Status PC		
Purpose of grant/contribution GENERAL CHARITABLE PURPOSES			Amount 4,000

Name

HASBARA FELLOWSHIPS

Street

City	State	Zip Code	Foreign Country
Relationship	Foundation Status		
Purpose of grant/contribution			Amount 4,000

Name

JEWISH FEDERATION OF PINELLAS &amp; PASCO COUNTIES, FL

Street

City	State	Zip Code	Foreign Country
Relationship	Foundation Status		
Purpose of grant/contribution			Amount 17,000

Name

HILLELS OF THE FLORIDA SUNCOAST

Street

City	State	Zip Code	Foreign Country
Relationship	Foundation Status		
Purpose of grant/contribution			Amount 6,000

JUNE BAUMGARDNER GELBART FOUNDATION

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**Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

Name

BRANDEIS UNIVERSITY

Street

City	State	Zip Code	Foreign Country
Relationship	Foundation Status		
Purpose of grant/contribution			Amount 1,500

Name

AMERICAN FRIENDS OF BEIT ISSIE SHAPIRO

Street

City	State	Zip Code	Foreign Country
Relationship	Foundation Status		
Purpose of grant/contribution			Amount 5,000

Name

AMERICAN FRIENDS OF THE HEBREW UNIVERSITY RESEARCH FELLOWSHIPS

Street

City	State	Zip Code	Foreign Country
Relationship	Foundation Status		
Purpose of grant/contribution			Amount 5,000

Name

JEWISH NATIONAL FUND

Street

City	State	Zip Code	Foreign Country
Relationship	Foundation Status		
Purpose of grant/contribution			Amount 3,000

Name

NEFESH B'NEFESH ALIYAH BET

Street

City	State	Zip Code	Foreign Country
Relationship	Foundation Status		
Purpose of grant/contribution			Amount 1,000

Name

CONGREGATION BETH SHALOM

Street

City	State	Zip Code	Foreign Country
Relationship	Foundation Status		
Purpose of grant/contribution			Amount 30,000



JUNE BAUMGARDNER GELBART FOUNDATION

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**Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

Name

UNIVERSITY OF SOUTH FLORIDA

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

10,000

Name

ASUH, AMERICAN SOCIETY OF THE UNIVERSITY OF HAIFA SCHOLARSHIP

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

3,000

Name

BET SHEMESH EDUCATIONAL CENTER

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

4,000

Name

FRIENDS OF ISRAEL DEFENSE

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

2,000

Name

AMERICAN FRIENDS OF JORDAN

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

2,000

Name

SHALOM HARTMAN INSTITUTE OF NORTH AMERICA

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

8,000

JUNE BAUMGARDNER GELBART FOUNDATION

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**Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

Name

AMERICAN FRIENDS OF TEL AVIV UNIVERSITY

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount 6,000

Name

FRIENDS OF YEMIN ORDE

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount 5,000

Name

FLORIDA HOLOCAUST MUSEUM

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount 2,000

Name

HILLEL AT THE UNIVERSITY OF FLORIDA

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount 16,000

Name

JEWISH MUSEUM OF FLORIDA

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount 1,000

Name

P E F ISRAEL ENDOWMENT FUNDS, INC

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount 8,000

JUNE BAUMGARDNER GELBART FOUNDATION

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**Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

Name

AMERICAN FRIENDS OF ISRAEL ELWYN

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

1,000

Name

AMERICAN FRIENDS OF KOLOT

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

1,000

Name

PARDES INSTITUTE OF JEWISH STUDIES

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

4,000

Name

JERUSALEM ONLINE U COM

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

1,000

Name

MENORAH MANOR, INC

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

18,000

Name

JUDAISM &amp; DEMOCRAZY ACTION ALLIANCE

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

4,000

JUNE BAUMGARDNER GELBART FOUNDATION

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**Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

Name

AMERICAN FRIENDS OF THE ISRAEL SPORT CENTER

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount
			2,500

Name

AMERICAN FRIENDS OF LEKET ISRAEL

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount
			2,000

Name

AMERICAN FRIENDS SAMI SHAMOON

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount
			15,000

Name

ISRAEL CENTER FOR EXCELLENCE

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount
			3,000

Name

GULF COAST JEWISH FAMILY AND COMMUNITY SERVICES, INC.

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount
			7,500

Name

ALEXANDER MUSS INSTITUTE

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount
			8,000

JUNE BAUMGARDNER GELBART FOUNDATION

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**Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

Name

AMERICAN FRIENDS OF ELI

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

2,000

Name

AMERICAN FRIENDS OF MELITZ

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

1,000

Name

JCC SUNCOAST

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

1,000

Name

RAMAH DAROM

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

1,000

Name

CENTER FOR JEWISH STUDIES

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

2,000

Name

AMERICAN FRIENDS OF NATAL

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

1,000

JUNE BAUMGARDNER GELBART FOUNDATION

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**Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

Name

SCHECHTER INSTITUTES INC

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

4,000

Name

AMERICAN SOCIETY FOR TECHNION-ISRAEL INSTITUTE OF TECHNOLOGY

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

6,000

Name

HILLEL ACADEMY, TAMPA, FL

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

11,000

Name

JEWISH AGENCY FOR ISRAEL NORTH AMERICA

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

3,000

Name

BENJAMIN TOWER FOUNDATION

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

1,500

Name

AMERICAN FRIENDS OF GESHER

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

3,000

JUNE BAUMGARDNER GELBART FOUNDATION

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**Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

Name

FRIENDS OF YAD SARAH

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount 2,000

Name

TAMPA BAY JOB LINKS

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount 2,000

Name

BOYS TOWN JERUSALEM FOUNDATION OF AMERICA, INC

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount 3,000

Name

CHAMAH

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount 1,000

Name

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount

Name

Street

City	State	Zip Code	Foreign Country
Relationship		Foundation Status	
Purpose of grant/contribution			Amount



JUNE B. GELBART FOUNDATION  
ACCOUNT NO. 7950954

PORTFOLIO SUMMARY

AS OF 12/31/13

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MAJOR INVESTMENT CLASS	MARKET VALUE	PERCENT OF ACCOUNT	FEDERAL TAX COST	UNREALIZED GAIN/LOSS (FED TO MKT)	ACCRUED INCOME	INCOME YIELD AT MARKET
<u>PRINCIPAL PORTFOLIO</u>						
PRINCIPAL CASH	20,807.03-	0.38-%	20,807.03-			
STIF & MONEY MARKET FUNDS	55,129.49	1.01 %	55,129.49	0.00	0	0.01 %
CORPORATE OBLIGATIONS	723,994.20	13.24 %	735,000.00	11,005.80-	2,400	1.73 %
EQUITY SECURITIES	2,325,581.13	42.53 %	2,069,188.71	256,392.42	2,526	2.43 %
MUTUAL FUNDS	2,363,346.10	43.22 %	2,149,997.17	213,348.93	964	1.00 %
PRINCIPAL PORTFOLIO TOTAL	5,447,243.89	99.62 %	4,988,508.34	458,735.55	5,890	1.69 %
<u>INCOME PORTFOLIO</u>						
INCOME CASH	20,807.03	0.38 %	20,807.03			
STIF & MONEY MARKET FUNDS	14.45	0.00 %	14.45	0.00	0	0.00 %
INCOME PORTFOLIO TOTAL	20,821.48	0.38 %	20,821.48	0.00	0	0.00 %
<u>TOTAL ASSETS</u>						
	5,468,065.37	100.00 %	5,009,329.82	458,735.55	5,890	1.69 %



## Part I, Line 6 (950-PF) - Gain/Loss from Sale of Assets Other Than Inventory

Long Term CG Distributions										Amount				
Short Term CG Distributions										5,247				
Check "X" to include in Part IV	Description	CUSIP #	Purchaser	Check "X" if Purchaser is a Business	Date Acquired	Acquisition Method	Date Sold	Gross Sales Price	Cost or Other Basis	Valuation Method	Expense of Sale and Cost of Improvements	Depreciation	Adjustments	Net Gain or Loss
1	X	MATTEL INC			577081102		7/30/2013	10,958	11,889					-931
2	X	MALLINCKRODT PLC			GS785G107		8/28/2013	1,486	1,576					-90
3	X	NIELSEN HLDGS NV EURO 07			N63218106		5/22/2013	7,771	7,451					320
4	X	AVAGO TECHNOLOGIES LTD			Y0486S104		5/22/2013	6,893	6,986					-91
5	X	NISSAN CORP UNPONS ADR			65411202		5/22/2013	5,531	5,637					-106
6	X	NISSAN MOTOR LTD SPONS A			65474408		1/16/2013	12,594	16,105					-3,511
7	X	NOMURA HOLDINGS INC SPO			555354208		12/23/2013	14,107	15,886					-1,778
8	X	NORDEA BK AB SWED SPONS			65557A206		5/22/2013	4,760	2,853					1,907
9	X	ORACLE CORPORATION			68389X105		12/18/2013	16,980	17,012					-32
10	X	PHILIP MORRIS INTERNATIONAL			718172109		7/31/2013	21,289	22,260					-971
11	X	QUALCOMM CORP COM			747525103		5/24/2013	2,437	2,401					36
12	X	QUANTA SERVICES INCORP			74762E102		9/10/2013	8,968	9,179					-813
13	X	RSA INSURANCE GROUP PLC			74971A107		5/22/2013	8,435	9,348					-913
14	X	SSE PLC SPONS ADR			78467K107		5/22/2013	8,202	6,729					1,473
15	X	SANOFI SPONS ADR			80105N105		5/22/2013	14,301	8,913					5,388
16	X	SYNGENTA AG SPONS ADR			87160A100		10/29/2013	18,401	18,105					296
17	X	MITSUBISHI UFJ FINANCIALS			608922104		11/14/2013	16,990	16,025					965
18	X	MUNICH RE GROUP UNPONS			628188106		5/22/2013	12,802	8,231					4,571
19	X	TELE2 AB-B ADR			87612E108		5/22/2013	13,196	10,523					2,673
20	X	TEVA PHARMACEUTICAL INC			87952P307		5/22/2013	4,963	5,728					-775
21	X	THERMO FISHER SCIENTIFIC			881624209		5/22/2013	10,871	11,580					-709
22	X	TIM PARTICIPACDES SA SPO			883558102		5/22/2013	12,487	8,379					4,109
23	X	TOKYO GAS CO LTD UNPONS			88706P205		5/22/2013	10,796	13,353					-2,557
24	X	TOTAL SA SPONS ADR			89115101		5/22/2013	6,061	4,257					1,804
25	X	UNILEVER PLC SPONS ADR			89151E109		5/22/2013	12,056	12,274					-218
26	X	UNITEDHEALTH GROUP INC			904767104		5/22/2013	17,306	18,630					-1,324
27	X	VIAACOM INC CL B COM			91324P102		5/22/2013	12,128	9,263					2,863
28	X	VIAACOM INC CL B COM			92553P201		5/22/2013	6,596	6,039					557
29	X	VISA INC CL A			92826C839		5/22/2013	8,679	8,011					668
30	X	VODAFONE GROUP PLC SPO			92857M209		8/23/2013	4,459	4,517					-58
31	X	VOLKSWAGEN AG SPONS AD			928682402		5/22/2013	8,048	7,472					576
32	X	VOLKSWAGEN AG SPONS AD			928682402		7/8/2012	5,347	4,095					1,252
33	X	WALGREEN CO COM			93142Z109		5/22/2013	3,208	3,200					8
34	X	WESTPAC BANKING CORP SF			94106L109		5/22/2013	12,531	9,015					3,516
35	X	WHARF HLDGS LTD UNPONS			961214301		5/22/2013	6,337	4,948					1,389
36	X	WILLIAMS COS INC			96225408		6/24/2013	5,433	6,052					-819
37	X	ZIMMER HLDGS INC COM			969457100		5/22/2013	5,017	2,404					2,613
38	X	BTC CIF HEDGE FUNDS OF F			98956P102		7/31/2013	11,639	12,320					-682
39	X	ACCENTURE PLC CL A COM			G1151C101		5/22/2013	15,953	12,532					3,421
40	X	JAZZ PHARMACEUTICALS PL			G50871105		12/31/2013	890,603	954,208					136,395
41	X	AETNA INC COM			00817Y108		5/22/2013	7,339	4,917					2,422
42	X	AIR PRODUCTS & CHEMICALS			009158106		12/23/2013	10,754	5,387					5,367
43	X	AMERICAN INTL GROUP INC			026874784		7/12/2013	16	17					-1
44	X	AUSTRALIA & NEW ZEALAND			032329304		5/22/2013	14,591	10,785					3,796
45	X	BHP BILLITON PLC ADR			05545E209		5/22/2013	4,757	4,387					370
46	X	BNP PARIBAS SPONS ADR			05565A202		5/22/2013	7,755	7,177					578
47	X	BNP PARIBAS SPONS ADR			05565A202		8/9/2013	16,585	16,773					-188
48	X	BRITISH AMERN TOB PLC SP			110448107		5/22/2013	5,651	5,341					310
49	X	CENTURYLINK INC COM			156700106		5/22/2013	4,325	3,868					457
50	X	CHINA PETE & CHEM CORP UN			168919108		8/23/2013	8,650	8,178					472
51	X	CHINA TELECOM CORP LTD S			169426103		5/22/2013	8,887	9,354					-667
52	X	COACH INC COM			189754104		12/23/2013	15,167	16,194					-1,027
53	X	CONOCOPHILLIPS COM			20825C104		5/22/2013	6,207	6,298					-91
54	X	DTE ENERGY CO COM			233331107		5/22/2013	12,898	11,418					1,280
55	X	DAIHATSU MTR CO LTD UNSF			23381A108		5/22/2013	11,931	12,114					-183
56	X	DOLLAR GENERAL CORP CO			256877105		5/22/2013	8,955	10,516					-1,561
57	X	ENI SPA SPONS ADR			26874R108		5/22/2013	8,834	5,220					3,714
58	X	EMBRAR SA ADR			29082A107		5/22/2013	8,852	8,278					574
59	X	EXELON CORP COM			30161N101		5/22/2013	9,216	7,875					1,341
60	X	GENERAL ELECTRIC CORP			36960A103		5/22/2013	5,117	3,687					1,430
61	X	ILLINOIS TOOL WKS INC COM			452308109		5/22/2013	7,435	6,596					839
62	X	IMPERIAL TOBACCO GROUP			453142101		5/22/2013	17,470	14,145					3,325
63	X						5/22/2013	10,739	9,639					1,100
64	X						5/22/2013	6,495	4,552					1,943
65	X						5/22/2013	6,944	8,321					-1,377
66	X						5/22/2013	4,787	4,599					188
67	X						5/22/2013	7,068	6,229					839
68	X						5/22/2013	11,920	12,048					-128

**Part I, Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory**

Check "X" to include in Part IV	Description	CUSIP #	Purchaser	Check "X" if Purchaser is a Business	Date Acquired	Acquisition Method	Date Sold	Gross Sales Price	Cost or Other Basis	Valuation Method	Expense of Sale and Cost of Improvements	Depreciation	Totals		
													Gross Sales	Net Gain or Loss	
													Amount		
	Long Term CG Distributions												1,511,782	276,206	
	Short Term CG Distributions												0	0	
								Capital Gains/Losses					1,235,556		
								Other sales					0	0	
69	X	INTERNATIONAL BUSINESS M	459200101		1/12/2011		5/24/2013	206	189					0	17
70	X	INTL. BUSINESS MACHINES C	459200101		1/12/2011		7/31/2013	4,697	4,544					0	153
71	X	INTL. BUSINESS MACHINES C	459200101		2/3/2012		7/31/2013	8,806	8,520					0	286
72	X	INTL. BUSINESS MACHINES C	459200101		2/27/2012		7/31/2013	587	568					0	19
73	X	ITOCHEU CORP UNSPONS ADR	465717106		1/1/2003		5/22/2013	13,706	10,765					0	3,541
74	X	JOHNSON & JOHNSON COM	478160104		1/1/2003		5/22/2013	9,897	7,098					0	2,799
75	X	KODI CORP	488671106		1/1/2003		5/22/2013	10,417	13,836					0	-3,419
76	X	KODI CORP	488671106		1/1/2003		5/22/2013	9,181	9,190					0	-9
77	X	KONINKLIKE AHOOLD NV ADR	500467402		1/1/2003		5/22/2013	15,378	12,394					0	2,984
78	X	LILLY ELI & CO	532457108		5/24/2013		10/15/2013	6,399	6,339					0	-677
79	X	LOWES COS INC COM	548661107		1/1/2003		5/22/2013	8,573	5,956					0	2,617
80	X	LUXOTTICA GROUP SPA SPO	59068R202		5/24/2013		10/29/2013	18,796	17,038					0	-242
81	X	MARATHON OIL CORP COM	565849106		1/1/2003		5/22/2013	10,706	8,708					0	1,998
82	X	PRIOR TRUSTEE SALES			1/1/2003		12/31/2013	65,727						0	915
83	X	PARTNERSHIP SALES			1/1/2003		12/31/2013	65,727							65,727

**Part I, Line 11 (990-PF) - Other Income**

		10,589	10,589	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income
1	PARTNERSHIP INCOME	10,589	10,589	

**Part I, Line 16a (990-PF) - Legal Fees**

		2,839	0	0	2,839
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1		2,839			2,839

**Part I, Line 16c (990-PF) - Other Professional Fees**

		22,770	0	0	22,770
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	PROFESSIONAL FEES	22,770			22,770

**Part I, Line 18 (990-PF) - Taxes**

		1,249	1,249	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	FOREIGN TAX WITHHELD	1,249	1,249		

**Part I, Line 23 (990-PF) - Other Expenses**

		20,542	0	0	20,542
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
<b>1</b>	OTHER EXPENSES	20,542			20,542

**Part II, Line 10b (990-PF) - Investments - Corporate Stock**

		2,974,527		0		0	
Description		Num Shares/ Face Value	Book Value Beg of Year	Book Value End of Year	FMV Beg of Year	FMV End of Year	
1	CORPORATE STOCK		2,974,527				



**Part II, Line 10c (990-PF) - Investments - Corporate Bonds**

		949,155		0		0		0	
1	Description	Interest Rate	Maturity Date	Book Value Beg of Year	Book Value End of Year	FMV Beg of Year	FMV End of Year		
	CORPORATE BONDS			949,155					

**Part II, Line 13 (990-PF) - Investments - Other**

Asset Description		Book Value Beg. of Year	Book Value End of Year	FMV End of Year
1	OTHER INVESTMENTS	646,514	4,954,186	5,412,921

**Part III (990-PF) - Changes in Net Assets or Fund Balances**

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**Line 3 - Other increases not included in Part III, Line 2**

1	PARTNERSHIP SALE SETTLED IN FUTURE YEAR	1	136,395
2	HOLD BACK OF BTC PARTNERSHIP	2	189,495
3	Total	3	325,890

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Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

Long Term CG Distributions										Amount		Short Term CG Distributions									
										5,247	0										
Description of Property Sold	CUSIP #	How Acquired	Date Acquired	Date Sold	Gross Sales Price	Depreciation Allowed	Adjustments	Cost or Other Basis Plus Expense of Sale	Gain or Loss	270,959	1,235,556	Excess of FMV Over Adj Basis	Adjusted Basis as of 12/31/69	0	0	0	270,959				
1 MATTEL INC	571081102		5/24/2013	7/30/2013	10,959			0	11,893	-931	0	0	0	0	0	0	0				
2 MALLINCKRODT PLC	G37856210		5/24/2013	5/24/2013	1,469			0	1,576	-90	0	0	0	0	0	0	0				
3 NIELSEN HLDGS NV EURO 07 COM	N83218106		1/1/2003	5/22/2013	7,771			0	7,451	320	0	0	0	0	0	0	0				
4 AVAGO TECHNOLOGIES LTD COM	Y04865104		1/1/2003	5/22/2013	6,895			0	6,985	-91	0	0	0	0	0	0	0				
5 NIKON CORP UNSPONS ADR	654111202		1/1/2003	5/22/2013	5,531			0	5,637	-106	0	0	0	0	0	0	0				
6 NISSAN MOTOR LTD SPONS ADR	654744408		5/24/2013	1/16/2013	12,594			0	16,105	-3,511	0	0	0	0	0	0	0				
7 NORUMBA BK AB SWED SPONS ADR	855358208		5/24/2013	12/23/2013	14,107			0	13,068	1,039	0	0	0	0	0	0	0				
8 NORDEA BK AB SWED SPONS ADR	855574208		1/1/2003	5/22/2013	4,760			0	2,853	1,907	0	0	0	0	0	0	0				
9 ORACLE CORPORATION	883891105		5/24/2013	12/18/2013	16,980			0	17,012	-32	0	0	0	0	0	0	0				
10 PHILIP MORRIS INTERNATIONAL	716172108		5/24/2013	7/31/2013	21,289			0	22,260	-971	0	0	0	0	0	0	0				
11 QULCOMM CORP COM	747525103		1/12/2012	5/24/2013	2,437			0	2,401	36	0	0	0	0	0	0	0				
12 QUANTA SERVICES INCORPORATED	747828102		5/24/2013	9/10/2013	8,368			0	9,179	-813	0	0	0	0	0	0	0				
13 RSA INSURANCE GROUP PLC UNSPON	749714107		1/1/2003	5/22/2013	8,435			0	8,348	87	0	0	0	0	0	0	0				
14 SSE PLC SPONS ADR	784974107		1/1/2003	5/22/2013	8,202			0	8,728	-526	0	0	0	0	0	0	0				
15 SANOFI SPONS ADR	801581005		1/1/2003	5/22/2013	14,301			0	16,105	-1,804	0	0	0	0	0	0	0				
16 SINGSTAR AG SPONS ADR	808221104		5/24/2013	10/29/2013	18,401			0	18,401	0	0	0	0	0	0	0	0				
17 SUNBELT GROUP FINANCIAL SPONS ADR	608221104		5/24/2013	11/14/2013	16,950			0	16,025	925	0	0	0	0	0	0	0				
18 SUNBELT GROUP FINANCIAL SPONS ADR	608221104		1/1/2003	5/22/2013	12,802			0	10,523	2,279	0	0	0	0	0	0	0				
19 TARGET CORP COM	876125106		1/1/2003	5/22/2013	13,196			0	15,753	-2,557	0	0	0	0	0	0	0				
20 TARGET CORP COM	876125106		1/1/2003	5/22/2013	4,563			0	5,729	-1,166	0	0	0	0	0	0	0				
21 TEVA PHARMACEUTICAL INDS LTD ADR	81824208		1/1/2003	5/22/2013	10,871			0	11,560	-689	0	0	0	0	0	0	0				
22 THERMO FISHER SCIENTIFIC INC COM	883558102		1/1/2003	5/22/2013	12,487			0	13,353	-866	0	0	0	0	0	0	0				
23 TTM PARTICIPACOS SA SPONS ADR	883067205		1/1/2003	5/22/2013	10,768			0	12,274	-1,506	0	0	0	0	0	0	0				
24 TOKYO GAS CO LTD UNSPON ADR	883115101		1/1/2003	5/22/2013	6,061			0	6,061	0	0	0	0	0	0	0	0				
25 TOTAL SA SPONS ADR	883115109		1/1/2003	5/22/2013	12,556			0	16,630	-4,074	0	0	0	0	0	0	0				
26 UNILEVER PLC SPONS ADR	904767704		5/24/2013	9/25/2013	17,306			0	9,263	8,043	0	0	0	0	0	0	0				
27 UNITEDHEALTH GROUP INC COM	913441102		1/1/2003	5/22/2013	12,128			0	12,128	0	0	0	0	0	0	0	0				
28 VACOM INC CL B COM	92553P201		3/14/2013	5/22/2013	6,596			0	6,596	0	0	0	0	0	0	0	0				
29 VACOM INC CL B COM	92553P201		1/1/2003	5/22/2013	8,679			0	8,679	0	0	0	0	0	0	0	0				
30 VISA INC CL A	92806C439		5/24/2013	8/23/2013	4,539			0	4,539	0	0	0	0	0	0	0	0				
31 VODAFONE GROUP PLC SPONS ADR	92851W209		1/1/2003	5/22/2013	8,048			0	8,048	0	0	0	0	0	0	0	0				
32 VOLKSWAGEN AG SPONS ADR	92851W209		7/6/2012	5/24/2013	5,347			0	5,347	0	0	0	0	0	0	0	0				
33 WALGREEN CO COM	931422109		1/1/2003	5/22/2013	12,531			0	12,531	0	0	0	0	0	0	0	0				
34 WASTE MANAGEMENT INC COM	931422109		1/1/2003	5/22/2013	6,337			0	6,337	0	0	0	0	0	0	0	0				
35 WESTPAC BANKING CORP SPONS ADR	961213401		5/24/2013	8/24/2013	5,033			0	5,033	0	0	0	0	0	0	0	0				
37 WHARF HLDGS LTD UNSPONS ADR	962257408		1/1/2003	5/22/2013	5,017			0	5,017	0	0	0	0	0	0	0	0				
38 WILLIAMS COS INC	968457100		5/24/2013	7/31/2013	11,638			0	11,638	0	0	0	0	0	0	0	0				
39 ZIMMER HLDGS INC COM	98935P102		1/1/2003	5/22/2013	15,853			0	15,853	0	0	0	0	0	0	0	0				
40 BTC CIF HEDGE FUNDS OF FUNDS	5911050N24		3/3/2008	12/31/2013	690,603			0	554,208	136,395	0	0	0	0	0	0	0				
41 ACCENTURE PLC CL A COM	G151C1C101		1/1/2003	5/22/2013	7,339			0	4,917	2,422	0	0	0	0	0	0	0				
42 JAZZ PHARMACEUTICALS PLC	G50871105		5/24/2013	12/23/2013	10,154			0	5,387	4,767	0	0	0	0	0	0	0				
43 MALLINCKRODT PLC	G57856210		5/24/2013	7/12/2013	16			0	17	-1	0	0	0	0	0	0	0				
44 AETNA INC COM	00817Y108		1/1/2003	5/22/2013	14,581			0	10,785	3,796	0	0	0	0	0	0	0				
45 AIR PRODUCTS & CHEMICALS INC COM	009158106		1/1/2003	5/22/2013	4,157			0	4,387	-230	0	0	0	0	0	0	0				
46 AMERICAN INTL GROUP INC COM	026814764		1/1/2003	5/22/2013	7,755			0	7,177	578	0	0	0	0	0	0	0				
47 AUSTRALIA & NEW ZEALAND SPONS ADR	052528304		5/24/2013	6/9/2013	16,585			0	16,773	-188	0	0	0	0	0	0	0				
48 BHP BILLITON PLC ADR	05454E209		1/1/2003	5/22/2013	5,051			0	5,341	-290	0	0	0	0	0	0	0				
49 BNP PARIBAS SPONS ADR	05595A202		4/8/2013	5/22/2013	4,325			0	3,668	657	0	0	0	0	0	0	0				
50 BNP PARIBAS SPONS ADR	05595A202		1/1/2003	5/22/2013	8,650			0	8,178	472	0	0	0	0	0	0	0				
51 BEAM INC	073730103		5/24/2013	8/23/2013	8,687			0	8,687	0	0	0	0	0	0	0	0				
52 BRITISH AMERN TOB PLC SPONS ADR	110446107		5/24/2013	12/23/2013	15,167			0	18,194	-3,027	0	0	0	0	0	0	0				
53 CENTURYLINK INC COM	156706106		1/1/2003	5/22/2013	12,698			0	8,268	4,430	0	0	0	0	0	0	0				
54 CHINA CONSTR BK CORP UNSPONS ADR	168919108		1/1/2003	5/22/2013	11,931			0	11,418	513	0	0	0	0	0	0	0				
55 CHINA PETE & CHEM CORP ADR	16841R108		1/1/2003	5/22/2013	8,955			0	10,516	-1,561	0	0	0	0	0	0	0				
56 CHINA TELECOM CORP LTD SPONS ADR	168426103		1/1/2003	5/22/2013	8,934			0	5,220	3,714	0	0	0	0	0	0	0				
57 CITIGROUP INC COM	172867424		1/1/2003	5/22/2013	8,934			0	8,278	656	0	0	0	0	0	0	0				
58 COACH INC COM	189754104		1/1/2003	5/22/2013	9,218			0	7,975	1,243	0	0	0	0	0	0	0				
59 CONOCOPHILLIPS COM	20825C104		1/1/2003	5/22/2013	9,218			0	7,975	1,243	0	0	0	0	0	0	0				
60 DTE ENERGY CO COM	233331107		1/1/2003	5/22/2013	5,117			0	3,697	1,420	0	0	0	0	0	0	0				
61 DAHATSU MTR CO LTD UNSPONS ADR	233331107		1/1/2003	5/22/2013	17,435			0	14,145	3,290	0	0	0	0	0	0	0				
62 DOLLAR GENERAL CORP COM	258671105		1/1/2003	5/22/2013	10,739			0	9,652	1,087	0	0	0	0	0	0	0				
63 ENI SPA SPONS ADR	26814H108		1/1/2003	5/22/2013	10,739			0	9,652	1,087	0	0	0	0	0	0	0				
64 EMBREX SA ADR	29022A107		1/1/2003	5/22/2013	6,445			0	8,321	-1,876	0	0	0	0	0	0	0				
65 EXELON CORP COM	30181N101		1/1/2003	5/22/2013	8,944			0	4,568	4,376	0	0	0	0	0	0	0				

## Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

		Check "X" if Business	Street	City	State	Zip Code	Foreign Country	Title	Avg Hrs Per Week	Compensation	Benefits	Expense Account
			C/O SUNTRUST BANK, P O BOX 150	ORLANDO	FL	32802-1908		TRUSTEE	5 00	25,199		
1	NORMAN LIPOFF											
2	MARC A B SILVERMAN		C/O SUNTRUST BANK, P O BOX 150	ORLANDO	FL	32802-1908		TRUSTEE	5 00	25,199		
3	SUNTRUST BANK		P O BOX 1908	ORLANDO	FL	32802-1908		CORPORATE TRUSTEE	5 00	13,041		
4	BESSEMER TRUST							PRIOR TRUSTEE		22,928		
										86,367	0	0

**Part VI, Line 6a (990-PF) - Estimated Tax Payments**

	Date	Amount
1 Credit from prior year return . . . . .	11/15/2013	1 5,671
2 First quarter estimated tax payment . . . . .		2
3 Second quarter estimated tax payment . . . . .		3
4 Third quarter estimated tax payment . . . . .		4
5 Fourth quarter estimated tax payment . . . . .		5
6 Other payments . . . . .		6
7 Total . . . . .		7 5,671

## Grant Guidelines

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Grant requests can be for programs, general support, or a capital project.

Under the terms of the trust creating the foundation, grants are provided exclusively for the following:

1. Programs for needy children in Israel  
*at least 1/2 of grant money is for this purpose*
2. Programs for Jewish children and elderly in the U.S.  
*The primary geographic area of interest is the Tampa Bay area of Florida*

The Foundation considers "children" to include up to and through college age.

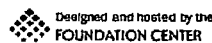
## Applications

Each year in February or March the June Baumgardner Gelbart Foundation approves grants to Section 501(c)(3) organizations for the calendar year.

The deadline for submission of all applications for grants is **December 31st**.

To apply, visit [How to Apply](#).

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Form **8868**

(Rev. January 2014)

Department of the Treasury  
Internal Revenue Service**Application for Extension of Time To File an  
Exempt Organization Return**► **File a separate application for each return.**► **Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868).**

OMB No 1545-1709

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box. ☒ **X**
  - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

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

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

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

Part I only ☐

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

Enter filer's identifying number, see instructions

<b>Type or print</b> File by the due date for filing your return. See instructions	Name of exempt organization or other filer, see instructions		Employer identification number (EIN) or
	JUNE BAUMGARDNER GELBART FOUNDATION		65-6390197
	Number, street, and room or suite no. If a P O box, see instructions		Social security number (SSN)
	C/O SUNTRUST BANK P O BOX 1908		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions		
	ORLANDO, FL 32802-1908		

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

04

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

- The books are in the care of ► SUNTRUST BANK

Telephone No. ► (407) 237-4500

Fax No. ►

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

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 8/15/2014, to file the exempt organization return for the organization named above. The extension is for the organization's return for ☒ calendar year 2013 or

► ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

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

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	8,750
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0
c <b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	8,750

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

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

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HTA



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Page **2**

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**.  
Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Type or print	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	JUNE BAUMGARDNER GELBART FOUNDATION	65-6390197
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P O box, see instructions	Social security number (SSN)
	C/O SUNTRUST BANK P O BOX 1908	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	ORLANDO, FL 32802-1908	

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

04

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

**STOP!** Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

- The books are in the care of **SUNTRUST BANK**  
Telephone No. **(407) 237-4500** Fax No. \_\_\_\_\_
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until 11/15/2014

5 For calendar year 2013, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return  
☐ Change in accounting period

7 State in detail why you need the extension. An attempt to obtain information necessary for filing a return was requested in a timely fashion, but the information was not furnished in sufficient time to permit the timely filing of the return, or the taxpayer personally visited an IRS office for the purpose of securing information or advice and was unable to meet with an IRS representative

8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	3,207
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	\$	14,421
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature James R. Takacs Title Manager - EA Date 8-11-15

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