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Form 990-PF

Department of the Treasury  
Internal Revenue Service

## Return of Private Foundation

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

Do not enter Social Security numbers on this form as it may be made public.

Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://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

A Employer identification number

THE DAVID NATHAN MEYERSON FOUNDATION

75-6535613

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

Room/suite

4441 BUENA VISTA ST.

B Telephone number

214-443-2000

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

DALLAS, TX 75205

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)

\$ 4,484,251. (Part I, column (d) must be on cash basis.)

J Accounting method:

☒ Cash ☐ Accrual☐ Other (specify)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))

(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

172,381.

2 Check ☐ if the foundation is not required to attach Sch B

3 Interest on savings and temporary cash investments

619.

583.

36.

STATEMENT 1

4 Dividends and interest from securities

34,374.

27,873.

STATEMENT 2

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

&lt;195,665.&gt;

STATEMENT 3

b Gross sales price for all assets on line 6a

51,935.

7 Capital gain net income (from Part IV, line 2)

0.

8 Net short-term capital gain

N/A

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit or (loss)

11 Other income

&lt;331,333.&gt;

15,334.

0.

STATEMENT 4

12 Total. Add lines 1 through 11

&lt;319,624.&gt;

43,790.

36.

13 Compensation of officers, directors, trustees, etc

0.

0.

0.

0.

14 Other employee salaries and wages

54,308.

0.

0.

54,308.

15 Pension plans, employee benefits

16a Legal fees

b Accounting fees

STMT 5

13,450.

0.

0.

13,450.

c Other professional fees

5,893.

5,893.

0.

0.

17 Interest

62,211.

0.

0.

0.

18 Taxes

STMT 6

19 Depreciation and depletion

20 Occupancy

21,072.

0.

0.

21,072.

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses

STMT 7

54,460.

33,672.

0.

20,788.

24 Total operating and administrative expenses. Add lines 13 through 23

211,394.

39,565.

0.

109,618.

25 Contributions, gifts, grants paid

803,769.

803,769.

26 Total expenses and disbursements. Add lines 24 and 25

1,015,163.

39,565.

0.

913,387.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

&lt;1,334,787.&gt;

b Net investment income (if negative, enter -0-)

4,225.

c Adjusted net income (if negative, enter -0-)

36.

323501  
10-10-13

LHA For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2013)

12 C30

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing			2,308,474.	3,318,944.	3,318,944.
	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					
	7 Other notes and loans receivable ▶					
	Less: allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments - U.S. and state government obligations					
	b Investments - corporate stock STMT 9			39,160.	0.	0.
	c Investments - corporate bonds					
	Liabilities	11 Investments - land, buildings, and equipment basis ▶	1,960.			
Less accumulated depreciation STMT 10 ▶		1,960.				
12 Investments - mortgage loans						
13 Investments - other STMT 11				2,211,959.	1,165,307.	1,165,307.
14 Land, buildings, and equipment basis ▶						
Less accumulated depreciation ▶						
15 Other assets (describe ▶)						
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)				4,559,593.	4,484,251.	4,484,251.
17 Accounts payable and accrued expenses						
18 Grants payable						
Net Assets or Fund Balances	19 Deferred revenue				1,207,000.	
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable					
	22 Other liabilities (describe ▶)					
23 Total liabilities (add lines 17 through 22)			0.	1,207,000.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>					
	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 ▶ <input checked="" type="checkbox"/>					
	and complete lines 27 through 31.					
	27 Capital stock, trust principal, or current funds			0.	0.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund			0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds			4,559,593.	3,277,251.		
30 Total net assets or fund balances			4,559,593.	3,277,251.		
31 Total liabilities and net assets/fund balances			4,559,593.	4,484,251.		

## 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	4,559,593.
2 Enter amount from Part I, line 27a	2	<1,334,787.>
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	96,095.
4 Add lines 1, 2, and 3	4	3,320,901.
5 Decreases not included in line 2 (itemize) ▶ UNREALIZED GAIN	5	43,650.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	3,277,251.

**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 XINERGY, LTD - SALE OF 20,000 SHARES	D	01/04/10	09/13/13
b CHEMBIO DIAGNOSTICS, INC. - SALE OF 4,712 SHARES	P	08/06/12	05/02/13
c WRITEOFF OF INVESTMENT - CUMBRE IP VENTURES, L.P.	P	01/01/10	01/25/13
d LONG-TERM CAPITAL GAIN - E2M VALUE ADDED FUND, LP	P	01/01/11	12/31/13
e SHORT-TERM CAPITAL LOSS - E2M VALUE ADDED FUND, L	P	01/01/13	12/31/13
f LONG-TERM CAPITAL GAIN - SCP CAPITAL II, LP	P	01/01/11	12/31/13
g			
h			
i			
j			
k			
l			
m			
n			
o			

(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 11,668.		71,250.	<59,582.>
b 21,440.		16,209.	5,231.
c		119,065.	<119,065.>
d 18,827.			18,827.
e		346,040.	<346,040.>
f		5,056.	<5,056.>
g			
h			
i			
j			
k			
l			
m			
n			
o			

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<59,582.>
b			** 5,231.
c			<119,065.>
d			18,827.
e			** <346,040.>
f			<5,056.>
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

&lt;505,685.&gt;

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):

If gain, also enter in Part I, line 8, column (c).

If (loss), enter "-0-" in Part I, line 8

3

&lt;340,809.&gt;

**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					
b SEE ATTACHED STATEMENT					
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 51,935.		557,620.	<505,685.>		
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
b					
c					
d					
e			<505,685.>		
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	<505,685.>	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8			3	<340,809.>	

**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	397,203.	2,456,893.	.161669
2011	522,922.	2,957,343.	.176822
2010	2,000.	27,400.	.072993
2009	0.	30,992.	.000000
2008	0.	28,777.	.000000

2 Total of line 1, column (d)	2	.411484
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	.082297
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	2,162,105.
5 Multiply line 4 by line 3	5	177,935.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	42.
7 Add lines 5 and 6	7	177,977.
8 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.	8	913,387.

**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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	42.
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		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		3	42.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	42.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	6,074.	
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	6,074.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	6,032.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax <input checked="" type="checkbox"/> Refunded <input type="checkbox"/>	11	0.	

**Part VII-A Statements Regarding Activities**

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

N/A

STMT 12

**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)			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)			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <b>WWW.2M.COM/DNMF</b>	X		
14	The books are in care of <b>2M CAPITAL MANAGEMENT</b> Telephone no. <b>214-443-2000</b> Located at <b>4441 BUENA VISTA ST., DALLAS, TX</b> ZIP+4 <b>75205</b>			
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 <b>BAHAMAS</b>		X	No

**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 checked="" type="checkbox"/> Yes <input 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		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?		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	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input checked="" type="checkbox"/> Yes <input 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)		X
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		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)?

☒ Yes ☐ No

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

☐ Yes ☒ No

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

5b ☒

Organizations relying on a current notice regarding disaster assistance check here

☐

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

☒ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b ☒

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.

(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
MORTON H. MEYERSON 4441 BUENA VISTA ST. DALLAS, TX 75205	TRUSTEE  1.00	0.	0.	0.

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

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

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

0



**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

**Part IX-A** Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 CONCERT FOR THE HOMELESS - MUSICAL PERFORMANCE FOR AN AUDIENCE OF APPROXIMATELY ONE HUNDRED HOMELESS PERSONS. DISTRIBUTED HYGIENE SUPPLIES TO PARTICIPANTS.	3,597.
2 SEE STATEMENT 13	4,108.
3 "SWINGMAN" DOCUMENTARY - SUPPORT FOR NONPROFIT FILM FESTIVALS IN NORTH AMERICA TO ENABLE THE SCREENING OF THE DOCUMENTARY FILM "SWINGMAN".	2,801.
4	

**Part IX-B** Summary of Program-Related Investments

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

Form 990-PF (2013)

**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	26,666.
b	Average of monthly cash balances	1b	2,168,364.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,195,030.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,195,030.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	32,925.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,162,105.
6	Minimum investment return. Enter 5% of line 5	6	108,105.

**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	108,105.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	42.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	42.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	108,063.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	108,063.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	108,063.

**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	913,387.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	913,387.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	42.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	913,345.

**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
<b>1</b> Distributable amount for 2013 from Part XI, line 7				108,063.
<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:		0.		
<b>3</b> Excess distributions carryover, if any, to 2013:				
<b>a</b> From 2008				
<b>b</b> From 2009				
<b>c</b> From 2010				630.
<b>d</b> From 2011				375,827.
<b>e</b> From 2012				304,998.
<b>f</b> Total of lines 3a through e	681,455.			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4: ▶ \$ 913,387.				
<b>a</b> Applied to 2012, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2013 distributable amount				108,063.
<b>e</b> Remaining amount distributed out of corpus	805,324.			
<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))	0.			0.
<b>6</b> Enter the net total of each column as indicated below:	1,486,779.			
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
<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		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			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)	0.			
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	1,486,779.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2009				
<b>b</b> Excess from 2010				630.
<b>c</b> Excess from 2011				375,827.
<b>d</b> Excess from 2012				304,998.
<b>e</b> Excess from 2013				805,324.

N/A

▶

4942(j)(3) or 4942(j)(5)

(4) Gross investment income

[illegible]

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

**Part XV** **Supplementary Information** (continued)

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
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 Paid during the year</b>				
AMERICAN ACADEMY OF THE ARTS AND SCIENCES 136 IRVING STREET CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	GENERAL	500.
CENTRAL FUND OF ISRAEL 980 AVE OF THE AMERICAS FRNT 3 NEW YORK, NY 10018-0000	NONE	PUBLIC CHARITY	GENERAL	360.
COMMITTEE FOR ACCURACY IN MIDDLE EAST P.O. BOX 35040 BOSTON, MA 02135-0001	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT CIF WATCH AND GENERAL SUPPORT	720.
DALLAS SYMPHONY ASSOCIATION 2301 FLORA STREET DALLAS, TX 75201	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT YOUNG AUDIENCES PROJECT, TO SUPPORT A KICKSTARTER CAMPAIGN CALLED DARE	47,200.
FAMILY TO FAMILY, INC. 6 CIRCLE DR HASTINGS-ON-HUDSON, NY 10706	NONE	PUBLIC CHARITY	TO FUND 12 TURKEY DINNERS FOR FAMILIES IN NEED.	180.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			<b>803,769.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				<b>0.</b>

**Part XV** Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
FOUNDATION FOR REMOTE JEWISH COMMUNITIES PO BOX 218 LOCUST VALLEY, NY 11560	NONE	PRIVATE FOUNDATION	ANONYMOUS GRANT FOR RABBI TOKAYER'S WORK WITH THE BENE EPHRAIM COMMUNITY.	20,000.
FRIENDS OF WRR P.O. BOX 12323 DALLAS, TX 75225	NONE	PUBLIC CHARITY	GENERAL	180.
JEWISH FEDERATION OF GREATER DALLAS 7800 NORTHAVEN ROAD DALLAS, TX 75230	NONE	PUBLIC CHARITY	GENERAL	106,600.
AMERICAN JEWISH JOINT DISTRIBUTION COMMITTEE P.O. BOX 4124 NEW YORK, NY 10163	NONE	PUBLIC CHARITY	TO SUPPORT THE ZIV MEDICAL CENTER IN ISRAEL FOR MEDICAL TREATMENT TO SYRIAN CASUALTIES.	30,000.
MIDDLE EAST MEDIA AND RESEARCH INSTITUTE P.O. BOX 27837 WASHINGTON, DC 20038-7837	NONE	PUBLIC CHARITY	GENERAL	360.
PHILANTHROPY ROUNDTABLE 1730 M STREET NW SUITE 601 WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	ANONYMOUS GRANT SPECIFICALLY DIRECTED TO THE VETERANS INITIATIVE.	500.
PROMISE OF PEACE COMMUNITY CENTER 1435 SAN SABA DALLAS, TX 75218	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT PROMISE OF PEACE COMMUNITY GARDENS	100.
SANTA FE DESERT CHORALE 311 E. PALACE AVE SANTA FE, NM 87501	NONE	PUBLIC CHARITY	GENERAL	360.
TEMPLE EMANU-EL 8500 HILLCREST AVE DALLAS, TX 75225	NONE	PUBLIC CHARITY	SUPPORT THE TEMPLE EMANU-EL PRESCHOOL FOR NEEDY FAMILIES, ANONYMOUS GRANT TO THE ANNUAL FUND FOR 2014,	20,465.
UNIVERSITY OF HOUSTON LAW FOUNDATION 100 LAW CENTER HOUSTON, TX 77204-6060	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR THE MARVIN NATHAN ADL FELLOW	1,000.
Total from continuation sheets				754,809.

**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
UT DALLAS - CENTER FOR BRAIN HEALTH 800 WEST CAMPBELL ROAD RICHARDSON, TX 75080-3021	NONE	PUBLIC CHARITY	GENERAL	500.
UNIVERSITY OF TEXAS AT AUSTIN 201 W. 7TH STREET AUSTIN, TX 78701	NONE	PUBLIC CHARITY	SUPPORT THE SCREENING COST FOR THE OF TWO MINDS DOCUMENTARY, AND IN HONOR OF MORRIS J. BEACHY TO SUPPORT THE	5,500.
VIDEO ASSOCIATION OF DALLAS 1405 WOODLAWN AVENUE DALLAS, TX 75208	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT THE 2013 DALLAS VIDEOFEST.	1,000.
WIKIMEDIA FOUNDATION 149 NEW MONTGOMERY, 3RD FLOOR SAN FRANCISCO, CA 97105	NONE	PUBLIC CHARITY	GENERAL	100.
YAVNEH ACADEMY OF DALLAS 12324 MERIT DRIVE DALLAS, TX 75251	NONE	PUBLIC CHARITY	TO SUPPORT THE YAVNEH STUDENT GROUP STUDENTS AGAINST TERRORISM	180.
ALEPH SOCIETY 25 WEST 45TH STREET, SUITE 1405 NEW YORK, NY 10036	NONE	PUBLIC CHARITY	TO SUPPORT THE GLOBAL DAY OF JEWISH LEARNING AND ANONYMOUS GRANT TO SUPPORT RABBI STEINSALTZ'S EFFORTS.	1,260.
AMERICAN FRIENDS OF NSWAS 12925 RIVERSIDE DR., SUITE 230 SHERMAN OAKS, CA 91423	NONE	PUBLIC CHARITY	TO SUPPORT NEVE SHALOM/WAHAT AL-SALAM.	1,000.
AMERICAN FRIENDS OF WGH 4802 BILANDON RD. LOUISVILLE, KY 40241	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR SUPPORT OF ABDUL RAZEK PROGRAM	900.
AMERICAN JUNIOR GOLF ASSOCIATION 1980 SPORTS CLUB DRIVE BRASELTON, GA 30517	NONE	PUBLIC CHARITY	ANONYMOUS GRANT IN SUPPORT OF THE ACE GRANT PROGRAM IN HONOR OF LINDA AND TOM BARTON	2,000.
AMUTAT SELA HAR-HOTZVIM, P.O.B. 45032 JERUSALEM, ISRAEL 91450	NONE	PUBLIC CHARITY	ANONYMOUS GRANT - SALARY SUPPORT FOR FOOD DISTRIBUTION SYSTEM	16,200.
Total from continuation sheets				

**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
ANTI-DEFAMATION LEAGUE 605 THIRD AVENUE NEW YORK, NY 10158-3560	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR GENERAL SUPPORT IN HONOR OF MARVIN NATHAN'S WORK WITH THEM.	1,800.
ATZUM INC. 8631 KARLOV SKOKIE, IL 60076	NONE	PUBLIC CHARITY	SUPPORT ATZUM'S EDUCATIONAL RESOURCE FUND.	360.
AUW SUPPORT FOUNDATION 1100 MASSACHUSETTS AVENUE, SUITE 300 CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR AUW IN HONOR OF KATHLEEN M. PIKE, PHD	1,000.
BAT CONSERVATION INTERNATIONAL INC. PO BOX 162603 AUSTIN, TX 78716	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT PROTECTING BRACKEN BAT CAVE	1,000.
BIG THOUGHT 1409 SOUTH LAMAR STREET, SUITE 1015 DALLAS, TX 75215	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT THE JAZZ THRIVES SUMMER LEARNING PROGRAM.	5,000.
BIRTHDAY ANGELS USA INC. 2175 HUDSON TERRACE FORT LEE, NJ 07024	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT BIRTHDAY ANGELS ISRAEL	4,500.
BLUE STAR FAMILIES, INC P.O. BOX 322 FALLS CHURCH, VA 22040	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT THE WOUNDED WARRIOR FAMILIES 2013 FOURTH OF JULY PICNIC	2,000.
BUSINESS EXECUTIVES FOR NATIONAL SECURITY 1030 15TH STREET NW SUITE 200 EAST WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	GENERAL	10,000.
BUTLER SCHOOL OF MUSIC 2406 ROBERT DEDMAN DRIVE STOP E3100 AUSTIN, TX 78712-1555	NONE	PUBLIC CHARITY	IN SUPPORT OF THE UT STRING PROJECT	2,000.
CHILDREN'S MEDICAL CENTER OF DALLAS 2777 STEMMONS FWY STE 700 DALLAS, TX 75207	NONE	PUBLIC CHARITY	GENERAL	5,000.
<b>Total from continuation sheets</b>				



**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
CONNECTED WARRIOR FOUNDATION P.O. BOX 4701 ANNAPOLIS, MD 21403	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR THE PURCHASE OF TABLET DEVICES	1,000.
CONSERVATIVE JEWISH DAY SCHOOL OF DALLAS 18011 HILLCREST RD DALLAS, TX 75252	NONE	PUBLIC CHARITY	TO SUPPORT TO LOTZ/LIKUS FAMILY SUPPORT FUND	10,000.
DALLAS CASA 2757 SWISS AVENUE DALLAS, TX 75204	NONE	PUBLIC CHARITY	GENERAL	400.
DALLAS CENTER FOR THE PERFORMING ARTS 2100 ROSS AVE STE 650 DALLAS, TX 75201	NONE	PUBLIC CHARITY	GENERAL	250,000.
DALLAS CONTEMPORARY 161 GLASS STREET DALLAS, TX 75207	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT THE FAILE EXHIBITION	5,000.
DALLAS JEWISH COMMUNITY FOUNDATION 12700 HILLCREST ROAD, SUITE 201 DALLAS, TX 75230	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO THE RISCH SCHOLARSHIP FUND.	10,000.
DALLAS MUSEUM OF ART 1717 NORTH HARWOOD DALLAS, TX 75201	NONE	PUBLIC CHARITY	GENERAL	150.
DALLAS WIND SYMPHONY P.O. BOX 595026 DALLAS, TX 75359-5026	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR DALLAS WIND SYMPHONY BAND CAMP	3,050.
EAST DALLAS COMMUNITY SCHOOL 924 WAYNE STREET DALLAS, TX 75223	NONE	PUBLIC CHARITY	FOR PRE-SCHOOL SCHOLARSHIPS AND GENERAL SUPPORT	1,250.
EPISCOPAL SCHOOL OF DALLAS 4100 MERRELL ROAD DALLAS, TX 75229	NONE	PUBLIC CHARITY	TO SUPPORT THE MARY E. WILLIAMS ENDOWED ALUMNI SCHOLARSHIP FUND	250.
<b>Total from continuation sheets</b>				

**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
FIRST STAR INC. 901 K STREET, NW, SUITE 70 WASHINGTON, DC 20001	NONE	PUBLIC CHARITY	GENERAL	9,900.
FJC 253 WEST 35TH STREET, 4TH FL NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL	360.
FRIENDS OF THE DALLAS PUBLIC LIBRARY 1515 YOUNG STREET 7TH FLOOR DALLAS, TX 75201	NONE	PUBLIC CHARITY	GENERAL	180.
FRIENDS OF THE KATY TRAIL 5207 MCKINNEY AVENUE, SUITE 19A DALLAS, TX 75205	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR HALF COST OF TWO BICYCLES FOR DALLAS POLICE WHO MONITOR THE KATY TRAIL AND BIKE	1,156.
FRIENDS OF YEMIN ORDE INC. 4340 EAST-WEST HWY, SUITE 202 BETHESDA, MD 20814	NONE	PUBLIC CHARITY	ANONYMOUS GRANT IN SUPPORT OF THE YEMIN ORDE EDUCATIONAL INITIATIVES-ALONEY YITZHAK YOUTH VILLAGE	18,000.
GEORGE WASHINGTON UNIVERSITY 2121 EYE STREET, NW WASHINGTON, DC 20052	NONE	PUBLIC CHARITY	IN SUPPORT OF THE ROGER KENNEDY NATIONAL PARK SERVICE FELLOWSHIP	7,500.
GIVAT WASHINGTON, LTD D.N. EVTAH D.N. EVTAH, ISRAEL 79239	NONE	PUBLIC CHARITY	SALARY SUPPORT FOR MIZMOR ACADEMY OF JEWISH MUSIC	9,000.
GLOBAL YOUTH FOR EDUCATION AND CHANGE 348 COWLEY AVENUE EAST LANSING, MI 48823	NONE	PUBLIC CHARITY	GENERAL	100.
GOOD PEOPLE FUND 384 WYOMING AVENUE MILLBURN, NJ 07041	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR SALARY SUPPORT FOR AN EDUCATION CONSULTING POSITION AND TO SUPPORT BET HAYELED	9,300.
GREEN BRONX MACHINE INTERNATIONAL 3935 BLACKSTONE AVENUE BRONX, NY 10471	NONE	PUBLIC CHARITY	GENERAL	360.
Total from continuation sheets				

**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
GUERNICA INC. 112 W 27TH ST. STE 600 NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL	50.
HAVATZELET CULTURAL & EDUCATIONAL INST. 13 LEONARDO DA VINCI STREET TEL AVIV, ISRAEL 61400	NONE	PUBLIC CHARITY	TO FUND KIBBUTZ REISHIT GREENHOUSE PROJECT	18,000.
HAZON, INC. 116 JOHNSON ROAD FALLS VILLAGE, CT 06031	NONE	PUBLIC CHARITY	GRANT FOR SUBSIDIES FOR YOUNG PEOPLE TO ATTEND THE 2014 RETREATS.	5,000.
HERITAGE ROSE FOUNDATION P O BOX 831414 RICHARDSON, TX 75083	NONE	PUBLIC CHARITY	TO SUPPORT THE DISTRICT OF NYC PROJECT	1,000.
HUC-JIR ONE WEST FOURTH STREET NEW YORK, NY 10012-1186	NONE	PUBLIC CHARITY	TO SUPPORT RABBI MARMUR'S DISCRETIONARY FUND	4,000.
HUDSON LINK FOR HIGHER EDUCATION PO BOX 862 OSSINING NEW YORK, NY 10562	NONE	PUBLIC CHARITY	TO SUPPORT THE SULLIVAN CORRECTIONAL FACILITY ASSOCIATES DEGREE PROGRAM	18,000.
IN THEIR SHOES, R.A. 12-B HARAV TOLEDANO STREET NETANYA, ISRAEL 42755	NONE	PUBLIC CHARITY	FUND A PILOT PROGRAM OF THE MUSIC AND MEMORY PROJECT	2,280.
JESUIT REFUGEE SERVICE, INC. 1016 16TH ST NW STE 500 WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR THE KAKUMA REFUGEE CAMP IN KENYA	600.
JEWISH CHILD CARE ASSOCIATION OF NEW YORK 858 E. 29TH STREET BROOKLYN, NY 11210	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT THE GATEWAYS PROGRAM	360.
JEWISH CHILDREN'S REGIONAL SERVICE POST OFFICE BOX 7368 METAIRIE, LA 70010-7368	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR JCRC SUMMER CAMP SCHOLARSHIPS FOR NEEDY CHILDREN OUTSIDE OF METROPOLITAN AREAS.	14,000.
Total from continuation sheets				

**Part XV** Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
JEWISH COMMUNAL FUND OF NEW YORK 575 MADISON AVENUE, SUITE 703 NEW YORK, NY 10022	NONE	PUBLIC CHARITY	TO SUPPORT SIMON'S MITZVAH PROJECT FOR HOMES FOR THE HOMELESS WRITING PROGRAM AND GENERAL SUPPORT OF THE	2,590.
JEWISH COMMUNITY FEDERATION OF SF 121 STEUART STREET SAN FRANCISCO, CA 94105	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR FAMILIES IN CRISIS IN HONOR OF JOELLE STEEFEL'S BIRTHDAY	360.
KESSLER PARK UNITED METHODIST CHURCH 1215 TURNER AVE. DALLAS, TX 75208	NONE	PUBLIC CHARITY	CREDO, IN HONOR OF JONATHAN PALANT	500.
MARY CROWLEY MEDICAL RESEARCH CENTER 1700 PACIFIC AVE, SUITE 1100 DALLAS, TX 75201	NONE	PUBLIC CHARITY	GENERAL	1,000.
MCKINNEY AVENUE CONTEMPORARY 3120 MCKINNEY AVE. DALLAS, TX 75204	NONE	PUBLIC CHARITY	GENERAL	180.
MERCAZ L'MIDA DATI (MELED) P.O. BOX 45332 JERUSALEM, ISRAEL 9145102	NONE	PUBLIC CHARITY	SALARY SUPPORT FOR A FULL-TIME REMEDIATION SPECIALIST AT MELED LEARNING CENTER	12,000.
NEW ALTERNATIVES FOR CHILDREN 37 WEST 26TH STREET NEW YORK, NY 10010	NONE	PUBLIC CHARITY	GENERAL	36,000.
NEW YORK PUBLIC RADIO PO BOX 1550 NEW YORK, NY 10116-1550	NONE	PUBLIC CHARITY	ANONYMOUS GRANT SPECIFICALLY DIRECTED TO RADIOLAB	180.
NORTH TEXAS FOOD BANK 4500 S. COCKRELL HILL ROAD DALLAS, TX 75236-2028	NONE	PUBLIC CHARITY	GENERAL	5,150.
PASCHAL ALUMNI ASSOCIATION P.O. BOX 11876 FORT WORTH, TX 76110	NONE	PUBLIC CHARITY	GENERAL	90.
<b>Total from continuation sheets</b>				

**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
PASSION FOR CHILDREN'S, INC. 4809 COLE AVENUE SUITE 345 LB-127 DALLAS, TX 75205	NONE	PUBLIC CHARITY	GENERAL	2,000.
PEF ISRAEL ENDOWMENT FUNDS 630 THIRD AVENUE, 15TH FLOOR NEW YORK, NY 10017	NONE	PUBLIC CHARITY	GENERAL	180.
PROJECT EZRA 465 GRAND STREET - 4TH FLOOR NEW YORK, NY 10002	NONE	PUBLIC CHARITY	GENERAL	3,600.
RELIGIOUS ACTION CENTER OF REFORM JUDAISM 2027 MASSACHUSETTS AVE NW, AT KIVIE KAPLAN WAY WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	GENERAL	360.
SHALOM YISRAEL 11 BRAD LANE WHITE PLAINS, NY 10605	NONE	PUBLIC CHARITY	GENERAL	1,000.
SHARSHERET, INC 1086 TEANECK ROAD, SUITE 2G TEANECK, NJ 07666	NONE	PUBLIC CHARITY	GENERAL	1,000.
SHATTERPROOF 101 MERRITT 7 CORPORATE PARK, 1ST FLOOR NORWALK, CT 06851	NONE	PUBLIC CHARITY	GENERAL	500.
SHELTER MINISTRIES OF DALLAS PO BOX 151085 DALLAS, TX 75315	NONE	PUBLIC CHARITY	TO SUPPORT THE GENESIS WOMEN'S SHELTER	1,000.
SHUTAF INCLUSION PROGRAMS 6 BEIT HAARAVA ST., APT. 9 JERUSALEM, ISRAEL 93389	NONE	PUBLIC CHARITY	TO FUND TEEN CAMP PROGRAMS AND STAFF TRAINING	10,250.
SIGMA ALPHA MU FOUNDATION 8701 FOUNDERS ROAD INDIANAPOLIS, IN 46268	NONE	PUBLIC CHARITY	GENERAL	50.
<b>Total from continuation sheets</b>				

**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
SOUTHWEST JEWISH CONGRESS 11311 N CENTRAL EXPWY SUITE 300 DALLAS, TX 75243	NONE	PUBLIC CHARITY	GENERAL	1,800.
STUDENT FARM PROJECT, INC 235 UNION STREET BROOKLYN, NY 11231	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR THE STUDENT FARM PROJECT	1,000.
STUDENT FOR SERVICE, INC 322 W. 72ND STREET, SUITE 8B NEW YORK, NY 10023	NONE	PUBLIC CHARITY	ANONYMOUS GRANT FOR THE STUDENTS FOR SERVICE WORK IN THE BRONX	1,000.
SWIMMING ACROSS AMERICA ONE INTERNATIONAL PLACE, SUITE 4600 BOSTON, MA 02110	NONE	PUBLIC CHARITY	GENERAL	72.
TABLET MAGAZINE 37 WEST 28TH STREET, 8TH FLOOR NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL	90.
TAL TORAH FOUNDATION, INC 245 W 99TH ST APT 8B NEW YORK, NY 10025-5490	NONE	PUBLIC CHARITY	GENERAL	360.
TEXAS A&M FOUNDATION 401 GEORGE BUSH DR COLLEGE STATION, TX 77840	NONE	PUBLIC CHARITY	TEXAS A&M ENTREPRENEURSHIP BOOTCAMP FOR VETERANS	7,500.
TEXAS FRAGILE X ASSOCIATION P.O. BOX 154985 IRVING, TX 75015-4985	NONE	PUBLIC CHARITY	GENERAL	200.
THE LAM FOUNDATION 4015 EXECUTIVE PARK DR. SUITE 320 CINCINNATI, OH 45241	NONE	PUBLIC CHARITY	GENERAL	1,000.
THE MORAN CHOIRS SOCIETY P.O. BOX 360 BEIT ITZHAK EMEK HEFER, ISRAEL	NONE	PUBLIC CHARITY	TO FUND "SINGING HAPPILY" ACTIVITY WITH ETHIOPIAN IMMIGRANTS	11,000.
Total from continuation sheets				

**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
TO SAVE A LIFE 16405 EQUESTRIAN LANE ROCKVILLE, MD 20855	NONE	PUBLIC CHARITY	GENERAL	360.
UMB FOUNDATION, INC. 620 W. LEXINGTON ST. BALTIMORE, MD 21201	NONE	PUBLIC CHARITY	SUPPORT THE NICH BRAIN AND TISSUE BANK IN HONOR OF CRISPIN SHAKESHAFT.	180.
UNITED NATIONS WATCH - USA P.O. BOX 5872 FRIENDSHIP POST OFFICE WASHINGTON, DC 20016	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT UNITED NATIONS WATCH - USA	350.
URSULINE ACADEMY OF DALLAS 4900 WALNUT HILL LN. DALLAS, TX 75229	NONE	PUBLIC CHARITY	SUPPORT THE GENERAL SCHOLARSHIP FUND IN HONOR OF MADISON MAXWELL	600.
VISIONSPRING, INC. 322 EIGHTH AVENUE, SUITE 201 NEW YORK, NY 10001	NONE	PUBLIC CHARITY	ANONYMOUS GRANT TO SUPPORT THE 2013 DALLAS VIDEOFEST.	6,000.
YAD SOFFIN FOUNDATION 304 WEST 89TH STREET NEW YORK, NY 10024	NONE	PUBLIC CHARITY	RABBANIT'S PASSOVER PROJECT NEEDS	360.
USA PROJECTS 1905 HARNEY ST STE 700 OMAHA, NE 68102-2367	NONE	PUBLIC CHARITY	TO SUPPORT CLAIRE LIEBERMAN AND "THE ARCTIC, THE BEARS, AND FLOATING AWAY: AN EXPEDITION"	3,836.
Total from continuation sheets				

**Part XV** Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - DALLAS SYMPHONY ASSOCIATION

ANONYMOUS GRANT TO SUPPORT YOUNG AUDIENCES PROJECT, TO SUPPORT A  
KICKSTARTER CAMPAIGN CALLED DARE TO DRUM, AND FOR DALLAS SYMPHONY  
CHORUS TO HELP PEOPLE WHO CAN'T AFFORD THE SUMMER TOUR.

NAME OF RECIPIENT - TEMPLE EMANU-EL

SUPPORT THE TEMPLE EMANU-EL PRESCHOOL FOR NEEDY FAMILIES, ANONYMOUS  
GRANT TO THE ANNUAL FUND FOR 2014, AND GENERAL SUPPORT

NAME OF RECIPIENT - UNIVERSITY OF TEXAS AT AUSTIN

SUPPORT THE SCREENING COST FOR THE OF TWO MINDS DOCUMENTARY, AND IN  
HONOR OF MORRIS J. BEACHY TO SUPPORT THE 4TH PRIZE AWARD IN THE SENIOR  
SECTION OF THE MENUHI

NAME OF RECIPIENT - FRIENDS OF THE KATY TRAIL

ANONYMOUS GRANT FOR HALF COST OF TWO BICYCLES FOR DALLAS POLICE WHO  
MONITOR THE KATY TRAIL AND BIKE RACK FOR KATY TRAIL POLICE - IN KIND  
DONATION TO THE FRIENDS OF THE KATY TRAIL

NAME OF RECIPIENT - JEWISH COMMUNAL FUND OF NEW YORK

TO SUPPORT SIMON'S MITZVAH PROJECT FOR HOMES FOR THE HOMELESS WRITING  
PROGRAM AND GENERAL SUPPORT OF THE SHEFA SCHOOL.






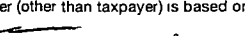
## Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

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?		Yes	No
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.			

[illegible]

**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		

<b>Sign Here</b>	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 instr.)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
	Signature of officer or trustee 		Date <u>11-14-2014</u>		Title <b>TRUSTEE</b>	
<b>Paid Preparer Use Only</b>	Print/Type preparer's name  <b>CURTIS MAXFIELD</b>		Preparer's signature 		Date <u>11/12/2014</u>	
	Check <input type="checkbox"/> if self-employed		PTIN <b>P00445178</b>			
	Firm's name ▶ <b>WHITLEY PENN LLP</b>					Firm's EIN ▶ <b>75-2393478</b>
Firm's address ▶ <b>8343 DOUGLAS AVENUE, STE. 400 DALLAS, TX 75225</b>					Phone no. <b>(214) 393-9300</b>	

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

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and  
its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

**2013**

Name of the organization

THE DAVID NATHAN MEYERSON FOUNDATION

Employer identification number

75-6535613

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

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

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization	Employer identification number
THE DAVID NATHAN MEYERSON FOUNDATION	75-6535613

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	SAM FREEDMAN 355 ADAMS STREET DENVER, CO 80206	\$ 7,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
2	MARLENE N. MEYERSON 4441 BUENA VISTA ST. DALLAS, TX 75205	\$ 20,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	RITA KOGER 4125 COLE AVENUE, APT. 6, DALLAS, TX 75204-8826	\$ 100,300.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
4	MILLEDGE A. HART, III 3811 TURTLE CREEK BLVD., SUITE 900 DALLAS, TX 75219	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	NANCY FROST 5857 TIMBERGATE NO. 1135 CORPUS CHRISTI, TX 78414	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

Employer identification number

THE DAVID NATHAN MEYERSON FOUNDATION

75-6535613

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

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

Name of organization

Employer identification number

**THE DAVID NATHAN MEYERSON FOUNDATION****75-6535613**

**Part III** Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) ► \$ \_\_\_\_\_

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
FIDELITY #9813	583.	583.	0.
IRS	36.	0.	36.
TOTAL TO PART I, LINE 3	619.	583.	36.

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
E2M VALUE ADDED FUND, LP	31,354.	0.	31,354.	24,853.	0.
SCP CAPITAL II, LP	3,020.	0.	3,020.	3,020.	0.
TO PART I, LINE 4	34,374.	0.	34,374.	27,873.	0.

FORM 990-PF

GAIN OR (LOSS) FROM SALE OF ASSETS

STATEMENT

3

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
XINERGY, LTD - SALE OF 20,000 SHARES	DONATED	01/04/10	09/13/13

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
11,668.	71,250.	0.	0.	<59,582.>

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
CHEMBIO DIAGNOSTICS, INC. - SALE OF 4,712 SHARES	PURCHASED	08/06/12	05/02/13

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
21,440.	16,209.	0.	0.	5,231.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
WRITEOFF OF INVESTMENT - CUMBRE IP VENTURES, L.P.	PURCHASED	01/01/10	01/25/13

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	119,065.	0.	0.	<119,065.>



(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
LONG-TERM CAPITAL GAIN - E2M VALUE ADDED FUND, LP	PURCHASED	01/01/11	12/31/13

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
18,827.	0.	0.	0.	18,827.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
SHORT-TERM CAPITAL LOSS - E2M VALUE ADDED FUND, LP	PURCHASED	01/01/13	12/31/13

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	346,040.	0.	0.	<346,040.>

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
LONG-TERM CAPITAL GAIN - SCP CAPITAL II, LP	PURCHASED	01/01/11	12/31/13

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	5,056.	0.	0.	<5,056.>

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
1231 GAIN - E2M VALUE ADDED FUND, LP	PURCHASED	01/01/11	12/31/13

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	0.	0.	0.	310,020.

NET GAIN OR LOSS FROM SALE OF ASSETS	<195,665.>
CAPITAL GAINS DIVIDENDS FROM PART IV	0.
TOTAL TO FORM 990-PF, PART I, LINE 6A	<195,665.>

FORM 990-PF	OTHER INCOME	STATEMENT	4
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
E2M VALUE ADDED FUND, LP	<331,734.>	14,933.	
SCP CAPITAL II, LP	401.	401.	
TOTAL TO FORM 990-PF, PART I, LINE 11	<331,333.>	15,334.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PRICewaterhouseCOOPERS, LLP	9,950.	0.	0.	9,950.
WHITLEY PENN, LLP	3,500.	0.	0.	3,500.
TO FORM 990-PF, PG 1, LN 16B	13,450.	0.	0.	13,450.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	62,211.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	62,211.	0.	0.	0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
WEBSITE EXPENSES	27.	0.	0.	27.
MISCELLANEOUS EXPENSES	351.	344.	0.	7.
OFFICE SUPPLIES	35.	0.	0.	35.
POSTAGE AND DELIVERY	83.	0.	0.	83.
TRAINING EXPENSE	4,120.	0.	0.	4,120.
E2M VALUE ADDED FUND, LP	30,425.	30,415.	0.	10.
SCP CAPITAL II, LP	2,913.	2,913.	0.	0.
SUPPLIES	16,506.	0.	0.	16,506.
TO FORM 990-PF, PG 1, LN 23	54,460.	33,672.	0.	20,788.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
LIQUIDATING DISTRIBUTION FOR SCP CAPITAL II, LP	96,095.
TOTAL TO FORM 990-PF, PART III, LINE 3	96,095.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
XINERGY, LTD	0.	0.
CHEMBIO DIAGNOSTICS, INC.	0.	0.
TOTAL TO FORM 990-PF, PART II, LINE 10B	0.	0.

FORM 990-PF	DEPRECIATION OF ASSETS HELD FOR INVESTMENT	STATEMENT	10
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTER EQUIPMENT	1,960.	1,960.	0.
TOTAL TO FM 990-PF, PART II, LN 11	1,960.	1,960.	0.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CRESTVIEW CAPITAL OFFSHORE FD	COST	3,325.	3,325.
CUMBRE IP VENTURES, LP	COST	0.	0.
E2M VALUE ADDED FUND, LP	COST	1,161,982.	1,161,982.
SCP CAPITAL II, LP	COST	0.	0.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,165,307.	1,165,307.

FORM 990-PF

LIST OF SUBSTANTIAL CONTRIBUTORS  
PART VII-A, LINE 10

STATEMENT 12

## NAME OF CONTRIBUTOR

## ADDRESS

MORTON H. MEYERSON

4441 BUENA VISTA ST.  
DALLAS, TX 75205

MARLENE N. MEYERSON

4441 BUENA VISTA ST.  
DALLAS, TX 75205

FORM 990-PF

## SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT 13

## ACTIVITY TWO

DISD HOMELESS STUDENT PROGRAM - DISD BEGAN A HOMELESS STUDENT INITIATIVE WHEREBY ORGANIZATIONS DONATED MONEY, GOODS AND SERVICES TO PROVIDE OPPORTUNITIES FOR STUDENTS WHO WOULD OTHERWISE BE UNABLE TO VISIT EDUCATIONAL FACILITIES .  
DNMF

PROVIDED GOODS AND SERVICES FOR HOMELESS STUDENTS PRIMARILY ENROLLED AT DALLAS NORTH HIGH SCHOOL. DNMF PROVIDED ADMISSION FOR VARIOUS VISITS INCLUDING THE PEROT MUSEUM, DALLAS WORLD AQUARIUM AND DALLAS SYMPHONY. DNMF ALSO WORKED IN COLLABORATION WITH NORTH TEXAS FOOD BANK TO PROVIDE MEALS TO THE HOMELESS STUDENTS AT THE SCHOOL.

## EXPENSES

TO FORM 990-PF, PART IX-A, LINE 2

4,108.

PORT  
FORM 990-PF PAGE 1

990-PF

[illegible]

328102  
05-01-13

(D) - Asset disposed

\* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

THE DAVID NATHAN MEYERSON FOUNDATION 75-6535613  
**Form 990-PF, Part VII-B, Line 5c - Expenditure Responsibility Statement**

Recipient's Name and Address	NO. 1	Grant Amount	Date of Grant	Amount Expended	Verification Date
THE FOUNDATION FOR REMOTE JEWISH COMMUNITIES P.O. BOX 218 LOCUST VALLEY, NY 11560		20,000.	09/09/13	20,000.	02/28/14
<b>Purpose of Grant</b>  TO SUPPORT WORK WITH THE BENE EPHRAIM COMMUNITY IN SOUTHERN INDIA. THE GOAL OF THE FOUNDATION FOR REMOTE JEWISH COMMUNITIES IS TO PROVIDE THE COMMUNITY THE MEANS TO BECOME INDEPENDENT, LIFT THEM OUT OF THE CLUTCHES OF THE CASTE SYSTEM AND ENABLE THEM TO CONTINUE THEIR PRACTICE OF JUDAISM.					
<b>Date of Reports by Grantee</b> 02/28/14		<b>Diversions by Grantee</b> N/A			
<b>Results of Verification</b>  FRJC PIONEERED IN SUPPORTING DEPARTMENTS OF JEWISH STUDIES AT MAJOR UNIVERSITIES IN CHINA, AND PROVIDED THE ENCYCLOPEDIA JUDAICA AND BASIC JEWISH TEXTS TO EACH UNIVERSITY DEPARTMENT OF JEWISH STUDIES. THEY ALSO FUND THE TRANSLATION OF CLASSIC JEWISH TEXTS INTO CHINESE AND, IN PARTNERSHIP WITH THE SCHUSTERMAN FAMILY FOUNDATION, HAVE EMBARKED ON A MAJOR JEWISH STUDIES PROGRAM IN CHINA, TOGETHER WITH NOTED PROFESSORS FROM ISRAEL AND THE USA.  THEREFORE, THE DAVID NATHAN MEYERSON FOUNDATION HAS EXERTED ALL REASONABLE EFFORTS, ESTABLISHED ADEQUATE PROCEDURES AND HAS FULFILLED THE OBLIGATIONS OF IRC SECTION 4945: (I) THE GRANT HAS BEEN SPENT SOLELY FOR THE PURPOSE FOR WHICH MADE, (II) THE FOUNDATION HAS OBTAINED FULL AND COMPLETE REPORTS FROM THE GRANTEE VERIFYING HOW THE FUNDS HAVE BEEN SPENT, AND (III) THE FOUNDATION HAS SUPPLIED A DESCRIPTION FOR THE MISSION AND SERVICES OF THE GRANTEE IN UTILIZATION OF SUCH DONATED FUNDS.					

THE DAVID NATHAN MEYERSON FOUNDATION 75-6535613  
**Form 990-PF, Part VII-B, Line 5c - Expenditure Responsibility Statement**

Recipient's Name and Address	NO. 2	Grant Amount	Date of Grant	Amount Expended	Verification Date
MORAN CHOIRS P.O. BOX 360, BEIT ITZHAK EMEK HEFER, ISRAEL, 42920		11,000.	11/27/13	11,000.	11/30/14
Purpose of Grant  TO SUPPORT THE "SINGING HAPPILY" ACTIVITY WITH ETHIOPIAN IMMIGRANTS IN SOUTH NETANYA.					
Date of Reports by Grantee 05/31/14 AND 11/30/14		Divisions by Grantee N/A			
Results of Verification  THE FOUNDATION REVIEWED THE GRANT REPORTS SUBMITTED BY THE GRANTEE, BUT DID NOT UNDERTAKE ANY VERIFICATION THEREOF, AS THERE WAS NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.					



THE DAVID NATHAN MEYERSON FOUNDATION 75-6535613  
**Form 990-PF, Part VII-B, Line 5c - Expenditure Responsibility Statement**

Recipient's Name and Address	NO . 3	Grant Amount	Date of Grant	Amount Expended	Verification Date
GIVAT WASHINGTON LTD. D.N. EVTAH D.N. EVTAH, ISRAEL, 79239		9,000.	07/26/13	9,000.	07/31/14
Purpose of Grant  TO SUPPORT SALARY COSTS FOR TEACHERS OF THE MIZMOR ACADEMY OF JEWISH MUSIC.					
Date of Reports by Grantee 07/31/14		Diversion by Grantee N/A			
Results of Verification  THE FOUNDATION REVIEWED THE GRANT REPORTS SUBMITTED BY THE GRANTEE, BUT DID NOT UNDERTAKE ANY VERIFICATION THEREOF, AS THERE WAS NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.					

THE DAVID NATHAN MEYERSON FOUNDATION 75-6535613  
Form 990-PF, Part VII-B, Line 5c - Expenditure Responsibility Statement

Recipient's Name and Address	NO. 4	Grant Amount	Date of Grant	Amount Expended	Verification Date
MERCAZ L'MIDA DATI (MELED) P.O. BOX 45332 JERUSALEM, ISRAEL, 9145102		12,000.	11/25/13	12,000.	11/01/14
<b>Purpose of Grant</b>  TO SUPPORT SALARY COSTS FOR A FULL-TIME REMEDIATION SPECIALIST AT THE MELED LEARNING CENTER THAT WILL PROVIDE SUPPORT FOR A RANGE OF LEARNING DISABILITIES AND ATTENTION DEFICIT ISSUES AMONG A POPULATION THAT HAS NOT FOUND ITS PLACE IN THE STANDARD SCHOOL SYSTEM IN ISRAEL.					
<b>Date of Reports by Grantee</b> 11/01/14		<b>Diversions by Grantee</b> N/A			
<b>Results of Verification</b>  THE FOUNDATION REVIEWED THE GRANT REPORTS SUBMITTED BY THE GRANTEE, BUT DID NOT UNDERTAKE ANY VERIFICATION THEREOF, AS THERE WAS NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.					

THE DAVID NATHAN MEYERSON FOUNDATION 75-6535613  
Form 990-PF, Part VII-B, Line 5c - Expenditure Responsibility Statement

Recipient's Name and Address	NO. 5	Grant Amount	Date of Grant	Amount Expended	Verification Date
AMUTAT SELA C/O LIVAY, SHALVI, KOP & CO. CPA HAR-HOTZVIM, P.O.B. 45032 JERUSALEM, ISRAEL, 91450		21,600.	06/01/13	21,600.	06/15/14
Purpose of Grant  TO SUPPORT SALARY COSTS FOR ADMINISTRATIVE STAFF RELATED TO FOOD DISTRIBUTION TO UNDERSERVED POPULATIONS.					
Date of Reports by Grantee 06/01/13; 07/08/13; 08/11/13; 09/16/13; 12/03/13; 03/05/14; AND 06/05/14		Divisions by Grantee N/A			
Results of Verification  THE FOUNDATION REVIEWED THE GRANT REPORTS SUBMITTED BY THE GRANTEE, BUT DID NOT UNDERTAKE ANY VERIFICATION THEREOF, AS THERE WAS NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.					

THE DAVID NATHAN MEYERSON FOUNDATION 75-6535613  
**Form 990-PF, Part VII-B, Line 5c - Expenditure Responsibility Statement**

Recipient's Name and Address NO. 6 HAVATZELETH CULTURAL AND EDUCATIONAL INSTITUTES OF HASHOMER HATZAIR C/O KIBBUTZ MOVEMENT FEDERATION 13 LEONARDO DA VINCI STREET TEL AVIV, ISRAEL, 61400	Grant Amount 18,000.	Date of Grant 08/05/13	Amount Expended 18,000.	Verification Date 01/31/14
Purpose of Grant TO SUPPORT THE CONSTRUCTION OF THE KIBBUTZ REISHIT COMMUNITY GREENHOUSE PROJECT.				
Date of Reports by Grantee 01/31/14	Diversions by Grantee N/A			
Results of Verification THE FOUNDATION REVIEWED THE GRANT REPORTS SUBMITTED BY THE GRANTEE, BUT DID NOT UNDERTAKE ANY VERIFICATION THEREOF, AS THERE WAS NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.				

THE DAVID NATHAN MEYERSON FOUNDATION 75-6535613  
Form 990-PF, Part VII-B, Line 5c - Expenditure Responsibility Statement

Recipient's Name and Address	NO. 7	Grant Amount	Date of Grant	Amount Expended	Verification Date
IN THEIR SHOES, R.A. 12-B HARAV TOLEDANO ST. NETANYA, ISRAEL, 42755		2,280.	08/01/13	2,280.	03/31/14
<b>Purpose of Grant</b>  TO FUND COSTS FOR A PILOT PROGRAM OF THE MUSIC AND MEMORY PROJECT IN ISRAEL. IN THEIR SHOES WORKS TO CREATE AWARENESS AND UNDERSTANDING OF DEMENTIA AND AGING.					
<b>Date of Reports by Grantee</b>		<b>Diversions by Grantee</b>			
03/31/14		N/A			
<b>Results of Verification</b>  THE FOUNDATION REVIEWED THE GRANT REPORTS SUBMITTED BY THE GRANTEE, BUT DID NOT UNDERTAKE ANY VERIFICATION THEREOF, AS THERE WAS NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.					

THE DAVID NATHAN MEYERSON FOUNDATION 75-6535613  
Form 990-PF, Part VII-B, Line 5c - Expenditure Responsibility Statement

Recipient's Name and Address	NO. 8	Grant Amount	Date of Grant	Amount Expended	Verification Date
SHUTAF INCLUSION PROGRAMS 6 BEIT HAARAVA ST., APT. 9 JERUSALEM, ISRAEL, 93389		10,250.	09/15/13	10,250.	05/31/14
Purpose of Grant  TO FUND TEEN CAMP PROGRAMS AND STAFF TRAINING FOR SHUTAF INCLUSION PROGRAMS FOR SPECIAL NEEDS CHILDREN IN JERUSALEM, ISRAEL.					
Date of Reports by Grantee		Diversions by Grantee			
05/31/14		N/A			
Results of Verification  THE FOUNDATION REVIEWED THE GRANT REPORTS SUBMITTED BY THE GRANTEE, BUT DID NOT UNDERTAKE ANY VERIFICATION THEREOF, AS THERE WAS NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.					

**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No. 1545-1709

► **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).**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ ►
- 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. <b>THE DAVID NATHAN MEYERSON FOUNDATION</b>	Employer identification number (EIN) or <b>75-6535613</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>4441 BUENA VISTA STREET</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>DALLAS, TX 75205</b>	

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

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 ► **2M COMPANIES, INC**

Telephone No. ► **214-443-2000** Fax No. ► **214-443-2020**

- 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**, 20 **14**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ calendar year 20 **13** or

► ☐ tax year beginning , 20 , and ending , 20 .

- 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

<b>3a</b> 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.	<b>3a</b>	\$	<b>6074</b>
<b>b</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.	<b>3b</b>	\$	<b>6074</b>
<b>c 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.	<b>3c</b>	\$	<b>NONE</b>

**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.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **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).

<b>Type or print</b>  File by the due date for filing your return. See instructions.	Enter filer's identifying number, see instructions	
	Name of exempt organization or other filer, see instructions. <b>THE DAVID NATHAN MEYERSON FOUNDATION</b>	Employer identification number (EIN) or <b>75-6535613</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>4441 BUENA VISTA STREET</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>DALLAS, TX 75205</b>	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

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.**

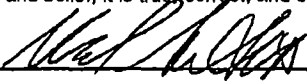
- The books are in the care of **2M COMPANIES, INC.**  
Telephone No. **214-443-2000** Fax No. **214-443-2020**
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption 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 **NOVEMBER 15**, 20 **14**.
- 5 For calendar year 2013, or other tax year beginning , 20 , and ending , 20 .
- 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 **ADDITIONAL TIME IS NEEDED TO PREPARE A COMPLETE AND ACCURATE TAX RETURN.**

<b>8a</b> 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.	<b>8a</b>	\$	<b>6074</b>
<b>b</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.	<b>8b</b>	\$	<b>6074</b>
<b>c Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>8c</b>	\$	<b>NONE</b>

**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  Title **CPA** Date **7-28-14**