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

2013

OMB No 1545-0052

Department of the Treasury Internal Revenue Service

► 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.

For ca	endar year 2015, or tax year beginning	, 2013	, and ending	,	
JONA	THAN & KATHLEEN ALTMAN FOUND	ATION		A Employer identification nu 85-0470898	ımber
C/0	AVALON TRÚST			B Telephone number (see the	e instructions)
125	LINCOLN AVENUE, SUITE 301 A FE, NM 87501			505-983-1111	
	eck all that apply Initial return	That alvature of a form	nas aublia abasibi	C If exemption application is	s pending, check here
G Ch	Final return	Initial return of a forr Amended return	ner public charity	D 1 Foreign organizations, che	nek hara
	Address change	Name change		, , , , , , , , , , , , , , , , , , ,	
H C		(c)(3) exempt private f	ioundation	2 Foreign organizations mee here and attach computati	
ר ר	Section 4947(a)(1) nonexempt charitable to		orivate foundation	•	
<u>\</u>		ounting method X C		E If private foundation statu under section 507(b)(1)(A	
		Other (specify)	asii Lincoldai	F If the foundation is in a 6	0-month termination
<b>►</b> \$		column (d) must be of	n cash basis )	under section 507(b)(1)(B	B), check here
Part	Analysis of Revenue and	(a) Revenue and	(b) Net investmen	t (c) Adjusted net	(d) Disbursements
	Expenses (The total of amounts in columns (b), (c), and (d) may not neces-	expenses per books	income	income	for charitable
	sarily equal the amounts in column (a)				purposes (cash basis only)
	(see instructions))	1 014 124	.42 %		***
	1 Contributions, girts, grants, etc, received (att sch) 2 Ck If the foundn is not reg to att Sch B	1,914,134.			
	3 Interest on savings and temporary	<u> </u>	* -2.4 * * *	· * *	
	cash investments				<u> </u>
	4 Dividends and interest from securities 5 a Gross rents	205,217.	205,21	7.	
	<b>b</b> Net rental income	**** ** * * * * * * * * * * * * * * *	1 3 y 7		
R	or (loss)  6 a Net gain/(loss) from sale of assets not on line 10	689,007.			
E V	b Gross sales price for all 3, 431, 893.	* * * * *	<u> </u>	.0 4 1-4 03 00 Dod F 1	
E N	Capital gali net income (from Part IV, line 2)  8 INCL Short term capital gain		689,00	7.	
N	9 Income modifications	*	*	7	
Ĕ	Da Grassisates less 2014				
Ŋ.	The Grossysales less 2014	•} *	*	* /3 4/ 1/2 1/2	* *
1	D Less Cost of	, , , , , , , ,	* / / / /	a contration	^ % &
ļ	c(Gross, biolit/(loss) (att sch)		<u>~ ~ ~ ~ ~ ~ ? @                        </u>	*	
(	11 Other income (attach schedule)  SEE STATEMENT 1	79,441.			
	12 Total. Add lines 1 through 11	2,887,799.	894,22	4. 0.	,6 ,44
	13 Compensation of officers, directors, trustees, etc .	0.	031/22		
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
A D	16a Legal fees (attach schedule) b Accounting fees (attach sch) SEE ST 2	8,995.	4,49	10	4,497
M !	c Other prof fees (attach sch) SEE ST 3	107,042.	53,52		53,521
O I P S E T	17 Interest	201,0121	00,02		33,322
P S E T R R	18 Taxes (attach schedule)(see instrs). SEE STM 4	8,092.	3,59	2.	
ÄÄÄ	19 Depreciation (attach sch) and depletion				
l i N V	20 Occupancy				<u> </u>
GÉ	21 Travel, conferences, and meetings				
A N D	22 Printing and publications 23 Other expenses (attach schedule)				ļ
D P	SEE STATEMENT 5	2,881.	2,88	1	
ENSES	24 Total operating and administrative	2,001.	2,00		<del> </del>
E S	expenses. Add lines 13 through 23	127,010.	64,49	4 2 2 ·	58,018
	25 Contributions, gifts, grants paid PART XV	641,400.	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	, 1 ( 1 × 1 × 1 × 1 × 1	641,400
	26 Total expenses and disbursements. Add lines 24 and 25	768,410.	64,49	0.	699,418
	27 Subtract line 26 from line 12:		. ( \$ ) W. C. C.	2, 8 8 3 8 3 7 8 3 7 8 7 9 7 9 7	
	a Excess of revenue over expenses and disbursements	2,119,389.			
	b Net investment income (if negative, enter -0-)	2,119,309.	829,73		
	C Adjusted net income (if negative, enter -0-)			0.	2
BAA F	or Paperwork Reduction Act Notice, see ins			TEEA0504L 10/18/13	Form <b>990-PF</b> (2013

Part		Balànce Sheets	column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	_ <u>`</u> _	Cash - non-interest		(L) Doon tundo	(2) - 5 - 1 - 1 - 1	(0)
ļ	•		ary cash investments	687,887.	902,083.	902,083.
		Accounts receivable	<del>-</del>	007,007.	302,003.	302,003.
	•	Less: allowance for			######################################	
	4	Pledges receivable				
	_	Less allowance for	doubtful accounts		<u> </u>	
	5	Grants receivable				
	6		cers, directors, trustees, and other			
		disqualified persons (atta	ch schedule) (see instructions)			
	7	Other notes and loans rec	eivable (attach sch)			
Ą		Less allowance for	doubtful accounts >			
Š	8	Inventories for sale	or use			
A S S E T	9	Prepaid expenses a	nd deferred charges			
Ś	10 a	Investments – US	and state government			
		obligations (attach s		F 056 012	7 106 074	0.647.060
	1	Investments — corporate	`	5,056,813.	7,186,274.	9,647,860.
		c Investments — corporate	, ,	1,947,402.	1,811,848.	1,810,446.
	11	Investments - land, equipment basis.	, buildings, and 			
		Less accumulated depred (attach schedule)	ciation • • • • • • • • • • • • • • • • • • •			
	12	Investments - mort				
	13	Investments - other	•	1,068,022.	991,491.	1,664,542.
	14	Land, buildings, and				
		Less accumulated depred (attach schedule)	►			
	15 Other assets (describe ►)		5,201.			
	16	Total assets (to be see the instructions	completed by all filers — Also, see page 1, item I)	8,765,325.	10,891,696.	14,024,931.
L	17		nd accrued expenses	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
I A	18	Grants payable	·			
B	19	Deferred revenue				
Ľ	20	Loans from officers, direc	ctors, trustees, & other disqualified persons			
Ī	21	Mortgages and other note	s payable (attach schedule)			
i i	22	Other liabilities (des	scribe • )	)		
E S	23	Total liabilities (add	l lines 17 through 22)	0.	0.	
		Foundations that fo	ollow SFAS 117, check here 24 through 26 and lines 30 and 31.			
		•	24 through 20 and thies 30 and 31.			
N F E U	24					1 2 1 1 2 2 2 1
ΤN	25	Temporarily restricte				
A D	26	-	_	7		
A B A L A		and complete lines	o not follow SFAS 117, check here > X 27 through 31.			
E L T A	27	Capital stock, trust	principal, or current funds			
SN	28	Paid-in or capital surplus	, or land, building, and equipment fund			
ΟĒ	29	Retained earnings, accum	nulated income, endowment, or other funds	8,765,325.	10,891,696.	
RS	30		fund balances (see instructions)	8,765,325.	10,891,696.	
	31	Total liabilities and (see instructions)	net assets/fund balances	8,765,325.	10,891,696.	
Par	Part III Analysis of Changes in Net Assets or Fund Balances					
1	Tota end-	I net assets or fund b	palances at beginning of year — Part II, coled on prior year's return).	lumn (a), line 30 (must a	agree with	8,765,325.
2	Ente	2,119,389.				
3		increases not included in I	6,982.			
4		lines 1, 2, and 3.	ine 2 (itemize) ► SEE STATEMENT			10,891,696.
5		eases not included in line 2	(itemize).		5	1,122,120
6			palances at end of year (line 4 minus line 5	5) – Part II, column (b),	line 30 <b>6</b>	10,891,696.
BAA						

(a) List and describ 2-story brick warehou	e the kind(s) of property sold (e g , rease, or common stock, 200 shares MLC	Company	How acquired  — Purchase  D — Donation	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a SEE STATEMENT 10			Donation -		
b				<u> </u>	
					<u> </u>
<u>c</u>					
d					
e (a) Cross sales areas	(O Degree setting allowed	(.) Cook or other house		#12 Cara as	(1)
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gaın or (e) plus (f) m	
a					
b					·
c	<del>                                     </del>				
d					
e					
	L wing gain in column (h) and owned by	the foundation on 12/31/69		0 (0.1	42
(i) Fair Market Value	(i) Adjusted basis	(k) Excess of column (i)		(1) Gains (Coli (1) ain minus column	umn (h) hut not less
as of 12/31/69	as of 12/31/69	over column (j), if any		an -0-) <b>or</b> Losses (fr	
a					
b					
С					-
d					
е					
2 Capital gain net income or (ne		enter in Part I, line 7 er -0- in Part I, line 7	2		689,007.
3 Net short-term capital gain or	(loss) as defined in sections 1222(5) a	and (6)			
If gain, also enter in Part I, lin	ne 8, column (c) (see instructions) If (	loss), enter -0-	3		0.
Part V Qualification Unde	er Section 4940(e) for Reduced	Tax on Net Investmen	t Income	1	
<u> </u>	te foundations subject to the section 4				
If 'Yes,' the foundation does not qua	ection 4942 tax on the distributable ame alify under section 4940(e) Do not con in each column for each year, see the	nplete this part	•	Yes	X No
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use asset	s (col	<b>(d)</b> Distribution umn (b) divided	
2012	660,997.	9,421,	995		0.070155
2011	755,987.	7,861,			0.096158
2010	784,266.	6,425,			0.122058
2009	745,507.	4,596,			0.162193
2008	690,110.	3,566,			0.193519
	050,110.	3,300,			
2 Total of line 1, column (d)			2		0.644083
3 Average distribution ratio for t number of years the foundation	the 5-year base period — divide the tot on has been in existence if less than 5	al on line 2 by 5, or by the years	3		0.128817
4 Enter the net value of noncha	ritable-use assets for 2013 from Part )	X, line 5	4	1.	2,119,578.
5 Multiply line 4 by line 3			5		1,561,208.
6 Enter 1% of net investment in	ncome (1% of Part I, line 27b)		6		8,297.
7 Add lines 5 and 6			7		1,569,505.
9 Enter qualifying distributions f			l l		
8 Enter qualifying distributions f	from Part XII, line 4		8	ļ	699,418.
	from Part XII, line 4 than line 7, check the box in Part VI, I	ine 1b, and complete that pa		6 tax rate See t	

Parl	t VI 🚉 Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 — see ins	struction	ıs)	
1 a	Exempt operating foundations described in section 4940(d)(2), check here	Z 3411		
	Date of ruling or determination letter. (attach copy of letter if necessary — see instrs)			
	Domestic foundations that meet the section 4940(e) requirements in Part V,	1	16	<u>,595.</u>
	check here ► ☐ and enter 1% of Part I, line 27b			
С	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)		<u> </u>	
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-).	2		0.
3	Add lines 1 and 2	3	16	,595.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4		0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	16	,595.
6	Credits/Payments	79 07 68		
а	2013 estimated tax pmts and 2012 overpayment credited to 2013			
b	Exempt foreign organizations — tax withheld at source 6b		4	
С	Tax paid with application for extension of time to file (Form 8868) 6c 17,750.	34 74		(1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -
d	Backup withholding erroneously withheld 6 d			." 7
7	Total credits and payments Add lines 6a through 6d	7	20	,180.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here if Form 2220 is attached 8	8		
9	Tax dad: If the total of filled that file filled that file of the	9		0.
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		3	,585.
11	Enter the amount of line 10 to be Credited to 2014 estimated tax 3,585. Refunded 1	1		0.
Par	Statements Regarding Activities		1 . 41	
1 a	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?		∫ i Ye 1a	s No
h	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes			
	(see the instructions for definition)?		1 Ь	X
	If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published			
_	or distributed by the foundation in connection with the activities		1 c	13 S Z Z
d C	Did the foundation file <b>Form 1120-POL</b> for this year? Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year		10	X
	(1) On the foundation >\$ 0. (2) On foundation managers >\$	0.	1 (34)	34 S
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers			
2	U.		2	
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2	X
	If 'Yes,' attach a detailed description of the activities			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		3	X
Δa	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a X	
	If 'Yes,' has it filed a tax return on Form 990-T for this year?		4b X	
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5	X
•	If 'Yes,' attach the statement required by General Instruction T			W 25.1
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
	By language in the governing instrument, or			
	<ul> <li>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?</li> </ul>			
			6	<u> </u>
	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV		7 X	<u>.</u> C <sup>6</sup> 8 to 2 38
вa	Enter the states to which the foundation reports or with which it is registered (see instructions)		1 - 1 *	
	NM			
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? If 'No,' attach explanation</i>		8b X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 49	342(j)(5)		
-	for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If 'Yes,' complete F	'art XIV	9	X
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names		10	,,
BAA	and addresses	Fo	10 rm 990-PF	(2013)
		1 0	220-1	(2010)

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 fiting requirements for Form TD F 90-22 1. If "Yes," enter the name of the foreign country *  Part VII-B 3   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.  1 a 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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from a disqualified person from the property of the property o	. A .	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5		
advisory privileges? If Yes, attach statement (see instructions)  12 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  Website address  **Y/A*  1 The books are in care of ** AVALON TRUST COMPANY*  Located at ** 125 LINCOLN AVENUE, SUITE 301 SANTA FE NM ZIP 4 ** 87501  15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of fax-exempt interest received or accrued during the year  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.  Part VII-B is 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.  1 a 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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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.)  (6) Agree to pay money or property to a government official? (Exception, Check: No' if the foundation agreed to make a grant to of to employ the foundation or government service, if terminating within 90 days.)  b) If any answers "Yes' to life, did any to the eacts fail to qualify under the exceptions described in Regulations section 34,944(0). 3 or in a current notice regarding disaster assis	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	х
Website address  **N/A**  Telephane no ** 505-983-1111  Located at ** 125 LINCOLN AVENUE, SUTTE 301 SANTA FE NM	12		12	Х
Website address  **N/A**  Telephane no ** 505-983-1111  Located at ** 125 LINCOLN AVENUE, SUTTE 301 SANTA FE NM	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application	? 13	
14 The books are in care of * AVALON TRUST COMPANY Located at * 125 LINCOIN AVENUE, SUITE 301 SANTA FE NM ZIP + 4 * 87501  15 Section 4947(a)(1) nonexempt charitable trusts fiting Form 990-PF in lieu of Form 1041 — Check here and enter the amount of tax-exempt interest received or accrued during the year 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 fiting requirements for Form TD F 90-22 I if Yes,' enter the name of the foreign country.  Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 If any item is checked in the Yes' column, unless an exception applies.  1 a 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?  2 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  3 Furnish goods, services, or facilities to (or accept them from) a disqualified person?  4 Yes   No    4 Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  5 Transfer any income or assets to a disqualified person?  6 Agree to pay impray or property to a povernment 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)  6 Agree to pay impray 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 or government service, if terminating within 90 days)  6 Agree to pay impray or property to a government official? (Exception, Check No: if the foundation appeals of the service of the first day of the tax year to government service, if terminating within 90 days)  6 Agree to pay impray or property to a governm				··
Located at 1.25 LINCOLN AVENUE, SUTTE 301 SANTA FE MM ZIP +4 87501  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  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.  Part VII-B is 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.  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?  (2) Borrow maney from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for 1 from 1 and	14		15-983-1	111
15 Section 4947(a)(1) nonexempt charitable trusts fitting form 990-PF in lieu of Form 1041 – Check here and enter the amount of tax-exempt interest received or accrued during the year  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 thing requirements for Form TD F 90-22 I. If Yes, enter the name of the foreign country.  Part VII. Bs. 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.  1 a 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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from ) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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) or one property to a government official? (Exception, Check 'No' if the foundation agreed to make a grant to or to employ the official for a pend after termination of povernment service, it terminating within 90 days)  16) If any anxer is 'Yes' is full (1)(4), did any of the acts fail to qualify under the exceptions described in Regulations section 34941(d)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  The bif yes, itsi the years 20	•		25 205 1	±*-*
and enter the amount of tax-exempt interest received or accrued during the year  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.  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.  1 a During the year did the foundation (enter directly or indirectly)  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (6) Agree to pay maney or property to a povernment official? (Exception, Check No' if the faundation agreed to make agriant to or to employ the official for a period after termination of government service, if terminating within 90 days.)  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 (6)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  c) Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?  2 Taxes on failure to distribute income (section 4942 (0) does not apply for years the foundation was a private operating foundation defined in sectio	15		<del>N</del> /A	
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 recurrements for Form TD F 90-22 1 if 'Yes,' enter the name of the foreign country.  Part VII-B3   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.  1 a 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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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) or or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person) or or general disaster assistance (see instructions)?  Organizations section 53 4941 (0)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?  2 Taxes on failure to distribute income (section 4942) (30) or 4942(0) or	13		1	'⊔ N/A
See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If Yes,' enter the name of the 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.\(^*\)   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.   1 a During the year did the foundation (either directly or indirectly)   (1) Engage in the sale or exchange, or leasing of property with a disqualified person?   Yes   No disqualified person?   No disqualified person?   Yes   No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?   Yes   No (5) Transfer any income or assets to a disqualified person of open of the benefit or use of a disqualified person)   Yes   No (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a grant to or to employ the official for a penied after termination of government service, if terminating within 90 days   No (5) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation section 53 4941(6):3 or in a current notice regarding disaster assistance check here   No (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation section 53 4941(6):3 or in a current notice regarding disaster assistance check here   No (7) and tatch day of the tax year egining in 2013?   No (7) and tatch day of the tax year egining in 2013?   No (8) Agree to pay money or property to a government service, if termination of povernment service, if terminating disaster assistance check here   No (8) Agree to pay agree to the service of the s		<u> </u>		
foreign country ►  Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.  1 a 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?	16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	X
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1 a 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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for divided by the official for a peniod after termination of government service, it terminating within 90 days)  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)?  Corganizations relying on a current notice regarding disaster assistance (see instructions)?  C) Did the foundation engage in a prior year in 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)?  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?  2 Taxes on failure to distribute income (section 4942(d)(3) or 4942(0)(5) or 4942			\. 4.9 \. 1×.0	
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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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 peniod after termination of government service, it terminating within 30 days?  (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 peniod after termination of government service, it terminating within 30 days?  (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 peniod after termination of government service, it terminating within 30 days?  (a) Pay sware is 'Yes' to 1a(1)-(6) day any of the acts fall to qualify under the exceptions described in Regulations section 3494(0)-3 or in a current notice regarding disaster assistance (see instructions)?  (b) If any answer is 'Yes' to 1a(1)-(6) and prove 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?  2 Taxes on failure to distribute income (section 4942(a)(2) (does not apply for years the foundation was a private operating foundation defined in section 4942(a)(3) or 4942(b)(5))  a At the end of tax year (2013, and the foundation is not applying the provisions of section 4942(a)(2) to all years listed, answer' 'No' and attach	Par	t VII-B   Statements Regarding Activities for Which Form 4720 May Be Required	· · · · · · · · · · · · · · · · · · ·	
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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 peniod after termination of government service, it terminating within 90 days)  (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 peniod after termination of government service, it terminating within 90 days)  (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? (Exception, Check No. if the foundation assets as \$4.00 or a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on 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?  2 Taxes on failure to distribute income (section 4942(a)(2) or 4942(a)(2		File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.	2.5.	Yes No
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(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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, it terminating within 90 days)  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(6)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(0)(3) or 4942(0)(3) and 4942(0)(3) or 4942(0)(3) or 4942(0)(3) and 4942(0)(3) are being applied to any of the years the foundation assisted in 2 and 50 feet of the foundation distribution 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)  I the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  1			No No	
disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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, it terminating within 90 days)  b) If any answer is 'Yes' to 1a(1)\( 6\), old any of the acts fall to qualify under the exceptions described in Regulations section 53 4941\( (0)\) 3 or in a current notice regarding disaster assistance (see instructions)?  Organizations refying on a current notice regarding disaster assistance (see instructions)?  Organizations refying on a current notice regarding disaster assistance (see instructions)?  Organizations refying on a current notice regarding disaster assistance with the foundation mapped in a provide operating foundation defined in section 4942\( ()\) does not apply for years the foundation was a private operating foundation defined in section 4942\( ()\) does not apply for years the foundation was a private operating foundation defined in section 4942\( ()\) does not apply for years the foundation was a private operating foundation defined in section 4942\( ()\) does not apply for years the foundation was a private operating foundation defined in section 4942\( ()\) does not apply for years the foundation was a private operating foundation defined in section 4942\( ()\) does not applying the provisions of section 4942\( ()\) (2) (relating to incorrect valuation of assets) to the year's undistributed income? (if applying section 4942\( ()\) (2) (relating to incorrect valuation of assets) to the year's undistributed income? (if applying section 4942\( ()\) (2) (relating to incorrect valuation of assets) to the year's undistr		(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a	, J.	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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?  (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 or government service, if terminating within 90 days.)  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(6)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?  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(0)(3) or 4942(0)(5))  a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?  If 'Yes,' list the years * 20		disqualified person?	1 4 9 8 8	: § Š 🐧 .
(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)?  (6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to a for employ the official for a period after termination  of government service, if terminating within 90 days)  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 (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  It is not rely in the secretary of the acts described in 1a, other than excepted acts, that we renot corrected before the first day of the tax year beginning in 2013?  2 Taxes on failure to distribute income (section 4942(j)(3) or 4942(j)(5)) or 4942(j)(5) or 4942(j)(5)  It is not rely in the foundation was a private operating disaster assistance (see instructions)  It is not rely in the foundation assistance of the foundation in the foundation defined in section 4942(j)(3) or 4942(j)(5) or 4942(j)(5)  It is not rely in the foundation assistance of the foundation in the foundation defined in section 49			) I ' I	
for the benefit or use of a disqualified person?  (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, it terminating within 90 days.)  b) If any answer is 'Yes' to 1 a(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 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?  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(0)(3) or 49420(05))  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 \( \times \) 20, 20, 20, 20, 20, 20, 20, 20		(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes	No  `***	
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)  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(0)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?  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?  b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) to all years listed, answer 'No' and attach statement — see instructions?  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		(5) Transfer any income or assets to a disqualified person (or make any of either available	1	*
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  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?  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()(3) or 4942()(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 \(^{\text{P}} \) 20, 20		for the benefit or use of a disqualified person) /	NO   *	<b>1. 1. 1. 1. 1. 1. 1. 1.</b>
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  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?  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()(3) or 4942()(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 \(^{\text{P}} \) 20, 20		(6) Agree to pay money or property to a government official? (Exception, Check 'No' if the	* * 2	
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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?  2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))  a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?  If 'Yes,' list the years   20, 20, 20, 20  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 )  c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here  20, 20, 20, 20  3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  Yes X 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)  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  b Did the foundation make any investment in a prior year (but after December 31, 1969) that could	b	olf any answer is 'Yes' to 1a(1)-(6), did <b>any</b> 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)?	1 b	N/A
that were not corrected before the first day of the tax year beginning in 2013?  2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))  a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?  If 'Yes,' list the years   20		Organizations relying on a current notice regarding disaster assistance check here	* * *	
that were not corrected before the first day of the tax year beginning in 2013?  2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))  a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?  If 'Yes,' list the years   20	_	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts	, , ,	
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?  If 'Yes,' list the years ▶ 20, 20, 20  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 ).  c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here ▶ 20, 20, 20  3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  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 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)  4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  b Did the foundation make any investment in a prior year (but after December 31, 1969) that could		that were not corrected before the first day of the tax year beginning in 2013?	1 c	X
and 6e, Part XIII) for tax year(s) beginning before 2013?  If 'Yes,' list the years   20	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))		
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.)  c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here  ≥ 20, 20, 20, 20  3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  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)  4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  b Did the foundation make any investment in a prior year (but after December 31, 1969) that could	а	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?	No	
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.)  c If the provisions of section 4942(a)(2) are being applied to <b>any</b> 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?  Ves X 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)  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  b Did the foundation make any investment in a prior year (but after December 31, 1969) that could				
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all years listed, answer 'No' and attach statement — see instructions.)  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	b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2)		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
c If the provisions of section 4942(a)(2) are being applied to <b>any</b> 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?  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)  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4a  b Did the foundation make any investment in a prior year (but after December 31, 1969) that could			2 h	N/Z
<ul> <li>▶ 20, 20, 20, 20</li></ul>	_	•	20	#6 - 3 1 7 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  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)  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  b Did the foundation make any investment in a prior year (but after December 31, 1969) that could	C			
enterprise at any time during the year?  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)  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4a  b Did the foundation make any investment in a prior year (but after December 31, 1969) that could	3 a	Did the foundation hold more than a 2% direct or indirect interest in any business	,	
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)  4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4 a  4 b Did the foundation make any investment in a prior year (but after December 31, 1969) that could		enterprise at any time during the year?	No 💮	
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)  4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4 a  4 b Did the foundation make any investment in a prior year (but after December 31, 1969) that could	h	If 'Yes,' did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation		
(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)  4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4 a  b Did the foundation make any investment in a prior year (but after December 31, 1969) that could		or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved	\$ y_ 04	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4a  4b Did the foundation make any investment in a prior year (but after December 31, 1969) that could		by the Commissioner under section 4943(c)(/)) to dispose of holdings acquired by gift or bequest, or (3) the lanse of the 10-15- or 20-year first phase holding period? (Use Schedule C. Form 4720, to	*	
charitable purposes?  • b Did the foundation make any investment in a prior year (but after December 31, 1969) that could		determine if the foundation had excess business holdings in 2013)	3ь	N/A
charitable purposes?  • b Did the foundation make any investment in a prior year (but after December 31, 1969) that could	A ~			
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could	4 a	charitable purposes?	4 a	X
<b>b</b> Did the foundation make any investment in a prior year (but after December 31, 1969) that could			( ) h	4, >>0 1
reported to charitable purpose that had not been removed from reported before the first day of	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	,3 × × ×	
the tax year beginning in 2013?		the tax year beginning in 2013?	4 b	X
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Part VII-B   Statements Regarding Activiti		1 4/20 May Be Req	uirea (continuea)	Low Control of the Co
5 a During the year did the foundation pay or incu (1) Carry on propaganda, or otherwise attempt	<del>-</del>	n (coction 4945(o))2	□vac [v]	No
• • • • • • • • • • • • • • • • • • • •	-		∐ Yes [X	
(2) Influence the outcome of any specific publion, directly or indirectly, any voter registra	tion drive?			No No
(3) Provide a grant to an individual for travel,	•		Yes X	No No
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	nan a charitable, etc, or 4940(d)(2)? (see instru	rganization described uctions)	Yes X	No
(5) Provide for any purpose other than religious educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children	c, literary, or or animals?	Yes X	No S
b If any answer is 'Yes' to 5a(1)-(5), did any of the described in Regulations section 53 4945 or in (see instructions)?	he transactions fail to a a current notice regard	qualify under the excep ding disaster assistance	tions	5 b N/A
Organizations relying on a current notice regard	rding disaster assistanc	ce check here	▶ ∐	
c If the answer is 'Yes' to question 5a(4), does to tax because it maintained expenditure responsible 'Yes,' attach the statement required by Region 16.	sibility for the grant?		N/A Yes	No
6a Did the foundation, during the year, receive ar on a personal benefit contract?			S Dvac V	No *
<b>b</b> Did the foundation, during the year, pay premi	ums, directly or indirec	tly, on a personal bene		6 b X
If 'Yes' to 6b, file Form 8870  7 a At any time during the tax year, was the found	lation a party to a proh	ubited tax shelter transa	iction? Yes X	No S
<b>b</b> If 'Yes,' did the foundation receive any procee				1/A 7b
Part VIII Information About Officers, Di				
and Contractors				
1 List all officers, directors, trustees, foundatio		<del> </del>		
(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
JONATHAN ALTMAN	DIRECTOR	0.	0.	0
_511_CAMINO_RANCHEROS SANTA FE, NM 87501	0			
RAFAEL ALTMAN	DIRECTOR	0.	0.	0
511 CAMINO RANCHEROS SANTA FE, NM 87501	0			
billill Edy III 01001				
2 Compensation of five highest-paid employees (ot	her than those included	on line 1 – see instructio	ns). 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				
				-
	1			
			<u></u>	
Total number of other employees paid over \$50,000	TEEA0306L 0	07/10/13		Form <b>990-PF</b> (2013)

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and Contractors (continued)	<del></del>	
3 Five highest-paid independent contractors for professional services (see in		
(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	<u> </u>	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 organizations and other beneficiaries served, conferences convened, research papers produced, etc.	I information such as the number of	Expenses
		·
1 <u>N/A</u>		
2		
3		
4		
		<u> </u>
Part X:B: Summary of Program-Related Investments (see Instruc	ctions)	
Describe the two largest program-related investments made by the foundation during the	tax year on lines 1 and 2	Amount
1		
<u>N/A</u>		
2		
All other program-related investments. See instructions		<u>.</u>
3		
~		
Total. Add lines 1 through 3	-	0.
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Pai	Minimum Investment Return (All domestic foundations must complete this part. see instructions.)	Foreign	foundations,
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.	3 + 1 1 a	10,872,174.
ł	Average of monthly cash balances	1 b	794,985.
•	Fair market value of all other assets (see instructions)	1 c	636,981.
•	Total (add lines 1a, b, and c)	1 d	12,304,140.
•	Reduction claimed for blockage or other factors reported on lines 1a and 1c	2.2	
	(attach detailed explanation) 1 e	0.	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	12,304,140.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	184,562.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	12,119,578.
6	Minimum investment return. Enter 5% of line 5	6	605,979.
Par	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operand certain foreign organizations check here ► ☐ and do not complete this part		oundations
1	Minimum investment return from Part X, line 6	1	605,979.
2 a	Tax on investment income for 2013 from Part VI, line 5 2a 16, 59	5.	, , , , , , , , , , , , , , , , , , , ,
ŀ	Income tax for 2013 (This does not include the tax from Part VI)	-5-4	
(	Add lines 2a and 2b	2 c	16,595.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	589,384.
4	Recoveries of amounts treated as qualifying distributions	4	· · · · · · · · · · · · · · · · · · ·
5	Add lines 3 and 4	5	589,384.
6	Deduction from distributable amount (see instructions)	6	
_ 7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	589,384.
Pai	Qualifying Distributions (see instructions)		
	Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes Expenses, contributions, gifts, etc — total from Part I, column (d), line 26	1 a	699,418.
ŀ	Program-related investments – total from Part IX-B	1 b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes.	2	<u></u>
3	Amounts set aside for specific charitable projects that satisfy the Suitability test (prior IRS approval required)	3 a	
t	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	699,418.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	699,418.
	<b>Note.</b> The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the qualifies for the section 4940(e) reduction of tax in those years	foundation	
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# Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2012	<b>(c)</b> 2012	<b>(d)</b> 2013
1	Distributable amount for 2013 from Part XI, line 7				589,384.
2	Undistributed income, if any, as of the end of 2013.	* * * * * * * * * * * * * * * * * * * *	* * * *		303,001.
ā	Enter amount for 2012 only		2 (2 <b>%)</b> 10 1	0.	
	• Total for prior years 20, 20, 20	> f) () () () () ()	0.	· · · · · · · · · · · · · · · · · · ·	1 · · · · · · · · · · · · · · · · · · ·
3	Excess distributions carryover, if any, to 2013	. 4 14 14 14 14	4 . 1 . 5 . 5		
	From 2008 512, 783.	* >} _' '	* ** · · · · ·		* * * * * * *
ŀ	From 2009 516, 526.	: 4 4	>	1 - 1 - 40 - 51 - 5 - 5	- 3
	From 2010 464,222.		/ *, * * * * * * * *	* * .	4 1 2 4 4
_	From 2011 364,183.		, , , , , ,	, 'x '	2 m 6 0 0 0 5 \$
	From 2012 192, 018.				
	Total of lines 3a through e	2,049,732.		<u> </u>	-
4	Qualifying distributions for 2013 from Part				1
	XII, line 4 ► \$ 699,418.			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
ä	Applied to 2012, but not more than line 2a	3 3 33 3	* * -	0.	** ***
ŧ	<ul> <li>Applied to undistributed income of prior years (Election required — see instructions)</li> </ul>		0.		· • • • • • • • • • • • • • • • • • • •
		1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	<b>0.</b>	* *	* * * * * * *
•	: Treated as distributions out of corpus (Election required – see instructions)	0.	* *		v .
(	Applied to 2013 distributable amount	. 1	~ ~ 4 **	1 4 · 1 ·	589,384.
•	Remaining amount distributed out of corpus	110,034.			, y 4 87 8 70
5	Excess distributions carryover applied to 2013	0.		. *	0.
	(If an amount appears in column (d), the same amount must be shown in column (a))				,
	same amount must be snown in column (a)		}		
6	Enter the net total of each column as	* * **		*	
_	indicated below:	* * * * *	\$ \$ ** *	,	
á	Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,159,766.	. \$ \$	* <u></u>	* * *
ł	Prior years' undistributed income Subtract line 4b from line 2b	* * *	0.	* * *	
•	Enter the amount of prior years' undistribut-		0.	• • •	·
	ed income for which a notice of deficiency	4 2 4 1		·	
	has been issued, or on which the section 4942(a) tax has been previously assessed	* * *	0.	* *	
	Subtract line 6c from line 6b Taxable				, , ,
•	amount - see instructions		0.		7 7 9 4 1 4 8
•	Undistributed income for 2012 Subtract line 4a from				
	line 2a. Taxable amount — see instructions	* **	, , ,	0.	, , , , , , ,
f	Undistributed income for 2013 Subtract lines			\$4 £	
	4d and 5 from line 1. This amount must be distributed in 2014.		6 1 1 1		
7	Amounts treated as distributions out of			<b>11.4.3.4%</b> € 5	0.
′	corpus to satisfy requirements imposed			2 4	
	by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
_	,	ļ	<u> </u>	20.23.3.4	
8	Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	512,783.		, , , , , , , , , , , , , , , , , , ,	
9	Excess distributions carryover to 2014.		<i>i</i> , <b>\</b> \	& & & *	21 14 8 1 1 1 4
	Subtract lines 7 and 8 from line 6a	1,646,983.	* *	43 8 6 3 1 1	
	Analysis of line 9				***************************************
_	Excess from 2009 516, 526.			, , , , , , , , , , , , , , , , , , , ,	, , , , ,
-	Excess from 2010 464, 222.				1
	Excess from 2011 364, 183.			, 1 th 1 5 do	
	Excess from 2012 192, 018.				
•	Excess from 2013 110,034.		* * * * _ ` ` ` ` ` ` ` ` ` ` ` ` ` ` `	#	7 7 7 7 7 7

1 al. Life Sourdation has ceaved a ruling or determination later 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.   b 60% of the case of the adjusted either corner from Part 1 or the minimum each year later of the ruling of the case of year later of the ruling of the case of the adjusted either corner from Part 1 or the minimum each year later of the ruling of the case of year later of year of years	Form 990-PF (2013) JONATHAN & KATHL			rt VII-A allestion	85-0470898 9)	B Page N/A
is a effective for 2013, enter the date of the ruling b Check bots to indicate whether the foundation is a private operating foundation described in section  4942(0)(30) or 4942(0)  2 a Enter the lesser of the adjusted net income form Part I or the minimum part I or the part I or t	1 a if the foundation has received a ruling or det	ermination letter that i				N/A
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part I or the minimum investment return from Part I or the minimum investment return from Part I or to the minimum investment return from Part I or to the Part I or I	is effective for 2013, enter the date of the	ruling			^	
mocroe from Part I, or the minimum investment return from Part X for several return from Part		p	rating foundation		4942(j)(3) or	4942(j)(5)
B 85% of line 2a Coulsifying distributions from Part XII, line 4 for each year Islaed d Arrouns included in line 2c not used directly for active conduct of exempt activities Coulsifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c of conduct of exempt activities Subtract line 2d from line 2c of row line 2c of more active conduct of exempt activities Subtract line 2d from line 2c of row	income from Part I or the minimum investment return from Part X for		<b>(b)</b> 2012		<b>(d)</b> 2010	(e) Total
the 4 for each year isted  d Aroust motive during it is to used directly for active conduct of exempt activities  C Qualifying distributions made directly for active conduct of exempt activities  Subtract line 2d from line 2.  3 Complete 3a, or for the alternative test — enter  (1) Value of all assets  (2) Value of assets qualifying under section 4942(µ/3)(9)(9)  5 Indownert alternative test — enter  (1) Value of assets qualifying under section 4942(µ/3)(9)(9)  5 Indownert alternative test — enter  (1) Total support other than gross investment income (interest, dividently, rents, payments on securities loans (section 512(a)(5), or royalbes)  (2) Support from great public and 5 or more exempt organizations  (3) Largest amount of support from a exempt organization  (4) Gross investment income  22222(3)  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 lust any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any fax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))  NONE  2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs: Check here  More Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs: Check here  More Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs: Check here  More Information Regarding Contribution makes gifts, grants, etc (see instructions) to individuals or organizations under other condition complete items 2a, b, c, and d  a The name, address, and telephone number or e-mail of the person to whom applications should be submitted and information and materials they should include  c Any submission deadlines	-					
for active conduct of exempt activities  Cualifying distributions made directly for active conduct of exempt activities  Subtract line 2d from line 2d  Camplete 3a, b, or for the alternative test relied upon  a Assets alternative test — enter (1) Value of all assets  (2) Value of assets qualifying under section 492(0)(3)(8)(1)  b Endowment alternative test — enter (1) Total support other than pross interior for each service of the condition of Part X, line is each service of the condition of Part X, line is each service of the condition of Part X, line is each service of the condition of Part X, line is each service of the condition of Part X, line is each service of the condition of Part X, line is each service of the condition of Part X, line is each service of the condition of Part X, line is each service of the condition of Part X, line is each service of the condition of Part X, line is each service of the condition of Part X, line is each service of the Condition of Part X, line is each service of the Condition of Pa	line 4 for each year listed					
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section 4942(i)(3)(B)(i) b Endowment alternative test — enter 273 of minimum investment returns shown in Part X, line 6 for each year listed C Support alternative test — enter (1) Total support other than gross investment income (interest, duvidends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or many segment organizations as provided in section 4942(i)(3)(B)(iii) (3) Largest amount of support from an exempt organization (4) Gross investment income  Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year — see instructions.)  Information Regarding Foundation Managers: a lust any managers of the foundation who have contributed more than \$5,000 (See section 507(d)(2))  NONE  b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest  NONE  Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs:  Check here P (3) 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 condition complete items 2a, b, c, and d a The name, address, and telephone number or e-mail of the person to whom applications should be addressed  d Any submission deadlines						
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(1) Total support other than gross investment income (interest, dividends, rents, payments on securities) loans (section 512(a)(5)), or royalities)  (2) Support from general public and 5 or more exempt organizations as provided in section 494(0)(30(5)), in section 494(0)(30(5))	minimum investment return shown in Part X,					
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Check here \( \bar{X} \) if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other condition complete items 2a, b, c, and d.  a The name, address, and telephone number or e-mail of the person to whom applications should be addressed.  b The form in which applications should be submitted and information and materials they should include.  c Any submission deadlines.  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors.	a partnership or other entity) of which the	n 10% or more of the se foundation has a 10	stock of a corporati 0% or greater inte	ion (or an equally large rest	e portion of the owner	ship of
b The form in which applications should be submitted and information and materials they should include  c Any submission deadlines  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors	Check here $\stackrel{\blacktriangleright}{\ }$ ${\ }$ If the foundation only m requests for funds If the foundation make complete items 2a, b, c, and d	akes contributions to pes gifts, grants, etc (	oreselected charital (see instructions)	ble organizations and o to individuals or orga	inizations under othe	
c Any submission deadlines  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors	a The name, address, and telephone number (	or e-mail of the person	г со многи аррисаці	oris should be address	eu	
<b>d</b> Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors	<b>b</b> The form in which applications should be	submitted and inform	mation and mater	ials they should inclu	de	
	c Any submission deadlines					<u></u>
Town 000 PF	d Any restrictions or limitations on awards,	such as by geograph	hical areas, charit	able fields, kinds of i	nstitutions, or other	factors
TEEQUATOR OFFICE AND ASSESSED FOR ASSESSED.		TEE	EA0310L 07/10/13		F	orm <b>990-PF</b> (2013

3 Grants and Contributions Paid During the Ye	ar or Approved for Fut	ure Paymen	t	
Recipient	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
Name and address (home or business)	substantial contributor	recipient	oonanganen	
a Paid during the year SEE STATEMENT 11				
Total			► 3a	641,400.
<b>b</b> Approved for future payment				
		1		
Total			► 3b	

### Part XVI-A Analysis of Income-Producing Activities

	s amounts unless otherwise indicated	Unrelated	d business incom	e Exclude	d by section 512, 513, or 514	
_		(a) Business code	(b) Amount	(c) Exclu- sion	(d) Amount	(e)  Related or exempt function income (See instructions)
1 Progr	am service revenue			code		, , , , , , , , , , , , , , , , , , , ,
a						
ь		<del> </del>				
c			-			
d		1			<del> </del>	
e		<del>   </del>	-			
- T	and contracts from government agencies	+				
-	pership dues and assessments	<del> </del>			*	
_	t on savings and temporary cash investments					
	ends and interest from securities			14	205,217.	
-	ental income or (loss) from real estate		, # 1			
	financed property	* 4 % % ;	,	****	* * * * * * * * * * * * * * * * * * *	
	ebt-financed property					
	ntal income or (loss) from personal property	<u> </u>			<del> </del>	
	investment income					
	r (loss) from sales of assets other than inventory			18	689,007.	
	ncome or (loss) from special events.			10	303,007.	
	s profit or (loss) from sales of inventory					
	revenue	4 + 3 1 4 4 4	* * . , . , .	195° ;	13 4 4 5 9 WY 1	* > %
	OME/LOSS PASSTHROUGH	900099	79,4		* * *	*
b	OHLY BOOK THOUSEN COOK	1 300033		-		
С						
ď						
e			-			
12 Subto	otal Add columns (b), (d), and (e)	19 * * 4; 1 1	79,4	41. * * *	894,224.	
13 Total	. Add line 12, columns (b), (d), and (e)				13	973,665.
(See works	heet in line 13 instructions to verify calculat	ions )				
Part XVI	-B Relationship of Activities to th					
Line No. ▼	Explain below how each activity for which accomplishment of the foundation's exemp	income is repo it purposes (otl	rted in column (e her than by provid	) of Part XVI Jing funds fo	-A contributed importar r such purposes) (See	itly to the instructions )
N/A						
		<del>-</del>				
			_		<del>.</del>	
_				_		
<del> </del>						
					-,	
					-	
						· · · · · · · · · · · · · · · · · · ·
<del>-</del>			<del>" '-</del>	<u> </u>		
				<u> </u>		
						·

# Form 990-PF (2013) JONATHAN & KATHLEEN ALTMAN FOUNDATION 85-0470898 Part XVII- Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

·			
Did the organization directly or indirectly described in section 501(c) of the Code (relating to political organizations?	engage in any of the following wi other than section 501(c)(3) organ	th any other organization nizations) or in section 527,	Yes No
a Transfers from the reporting foundation to	o a noncharitable exempt organiz	ation of	
(1) Cash	, -		1 a (1) X
(2) Other assets			1 a (2) X
<b>b</b> Other transactions			
(1) Sales of assets to a noncharitable ex	empt organization		1 b (1) X
(2) Purchases of assets from a noncharit	able exempt organization		1 b (2) X
(3) Rental of facilities, equipment, or oth	er assets		1 b (3) X
(4) Reimbursement arrangements			1 b (4) X
(5) Loans or loan guarantees			1 b (5) X
(6) Performance of services or members	·		1 b (6) X
c Sharing of facilities, equipment, mailing I	ists, other assets, or paid employ	ees	1c   X
<b>d</b> If the answer to any of the above is 'Yes, the goods, other assets, or services given by any transaction or sharing arrangement,	complete the following schedule the reporting foundation of the four show in column (d) the value of the	Column <b>(b)</b> should always show adation received less than fair marke the goods, other assets, or services	the fair market value of t value in s received
	of noncharitable exempt organization	(d) Description of transfers, transac	
N/A			
		<u> </u>	·
2 a Is the foundation directly or indirectly affiliate described in section 501(c) of the Code (c) b If 'Yes,' complete the following schedule	ed with, or related to, one or more to other than section 501(c)(3)) or in	ix-exempt organizations section 527?	Yes X No
(a) Name of organization	(b) Type of organization	(c) Description	on of relationship
N/A	(2) ), po e e generale	(5) 2 3 3 5 1 5	
Under penalties of perjury I declare that I have example to the period of the period o	mined this return, including accompanying sor than taxpayer) is based on all information of	hedules and statements, and to the best of m of which preparer has any knowledge	y knowledge and belief, it is true,  May the IRS discuss this return with the
lere DY Signatures of trustee, Sr. V.P.	[[	Title Title	preparer shown below (see instructions)?  X Yes No
Paid Print/Type preparer's name DEBORAH S. REISS	Preparer's signature	Date Check	If PTIN
	ISS & NETHERLAND, P.O	rifle (14 self-emp	, , , , , , , , , , , , , , , , , , , ,
		, Film's EIN'	00-0214133
Jse Only Firm's address P.O. BOX SANTA FE,	NM 87502	Phone no	505-982-4496
BAA	111 07002	, i none no	Form <b>990-PF</b> (2013)

# 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, 990-PF) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2013

Name of the organization JONATHAN & KATHL	EEN ALTMAN FOUNDATION	Employer identification number
C/O AVALON TRUST		85-0470898
Organization type (check one)		
Filers of:	Section:	
Form 990 or 990-EZ	501(c)( ) (enter number) organization	
	4947(a)(1) nonexempt charitable trust <b>not</b> treate	ed as a private foundation
	527 political organization	•
	oz/ pointed organization	
Form 990-PF	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated a	s a private foundation
	501(c)(3) taxable private foundation	
Check if your organization is covered by the (	General Rule or a Special Rule	
•	ganization can check boxes for both the General Rule	and a Special Pule. See instructions
	ganization can check boxes for both the deficial ridie	and a Special Note See Instructions
General Rule		
[X] For an organization filing Form 990, 990-EZ, contributor (Complete Parts I and II)	or 990-PF that received, during the year, \$5,000 or more (	in money or property) from any one
, , , , , , , , , , , , , , , , , , ,		
Special Rules		
<u>.</u>	Form 990 or 990-EZ that met the 33-1/3% support tes	t of the regulations under sections
509(a)(1) and $170(b)(1)(A)(vi)$ and receive	ed from any one contributor, during the year, a contributor VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete F	ution of the greater of (1) \$5,000 or
For a section 501(c)(7), (8), or (10) organization	tion filing Form 990 or 990-EZ that received from any one of	contributor, during the year,
total contributions of more than \$1,000 fo the prevention of cruelty to children or an	r use exclusively for religious, charitable, scientific, lite imals. Complete Parts I. II. and III	erary, or educational purposes, or
·	tion filing Form 990 or 990-EZ that received from any one of	contributor, during the year.
contributions for use <i>exclusively</i> for religious,	, charitable, etc. purposes, but these contributions did not t	total to more than \$1,000
	ntributions that were received during the year for an <i>exclus</i> filess the <b>General Rule</b> applies to this organization because	
religious, charitable, etc, contributions of	11	<b>►</b> \$
Caution: An organization that is not covered l	by the General Rule and/or the Special Rules does not	title Schedule B (Form 990, 990 F7, or
990-PF) but it must answer 'No' on Part IV, II	ne 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 t	the filing requirements of Schedule B (Form 990, 990-	
BAA For Paperwork Reduction Act Notice, s	see the Instructions for Form 990, 990EZ, Sched	dule <b>B</b> (Form 990, 990-EZ, or 990-PF) (2013)

Page

1 of

1 of **Part 1** 

Name of organization

JONATHAN & KATHLEEN ALTMAN FOUNDATION

Employer identification number

85-	04	70	89	8
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Partil	<b>Contributors</b> (see instructions) Use duplicate copies of Part I if additional space	is needed	
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BARTOS & ALTMAN CLT  1300 N. MARKET ST. STE 300  WILMINGTON, DE 19801	\$1 <u>,914,134.</u>	Person X  Payroll  Noncash X  (Complete Part II for noncash contributions )
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Complete Part II for noncash contributions )
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Complete Part II for noncash contributions )
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Complete Part II for noncash contributions )
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Complete Part II for noncash contributions )
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Complete Part II for noncash contributions )

BAA

Page

1 to

of Part II

JONATHAN & KATHLEEN ALTMAN FOUNDATION

Employer identification number

Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

85-0470898

# Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed (b) Description of noncash property given (a) No. from Part I (c) FMV (or estimate) (see instructions) (d) Date received SECURITIES 1,490,932 **VARIOUS** (a) No. from Part I (b) (c) FMV (or estimate) (see instructions) (d) Date received Description of noncash property given (a) No. from (b) Description of noncash property given (c) FMV (or estimate) (see instructions) (d) Date received Part I (a) No. from (b) Description of noncash property given (c) FMV (or estimate) (see instructions) (d) Date received Part I (a) No. from Part I (b) Description of noncash property given (c) FMV (or estimate) (see instructions) (d) Date received (a) No. from Part I (b) Description of noncash property given (d) Date received (c) FMV (or estimate) (see instructions)

Page

1 of Part III

Name of organization JONATHAN & KATHLEEN ALTMAN FOUNDATION Employer identification number

85-0470898

	organizations that total more than	\$1,000 for the year. Complete	te columns (a)	through (e) and the following line entry.	
	For organizations completing Part III, enter total contributions of \$1,000 or less for the year	il of <i>exclusively</i> religious, charitable (Enter this information once Se	ie, etc , ee instruction	ns) ►\$ N/A	
	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	
	N/A				
		(e) Transfer of gift			
	Transferee's name, addres	Transfer of gift s. and ZIP + 4	Rela	ationship of transferor to transferee	
		3, 4			
(2)	(6)	(6)		(d)	
(a) No. from	(b) Purpose of gift	(c) Use of gift		Description of how gift is held	
Part I		· · · · · · · · · · · · · · · · · · ·			
		(-)			
		(e) Transfer of gift			
	Transferee's name, addres	ss, and ZIP + 4	Relationship of transferor to transferee		
(a) No. from	(b) Purpose of gift	(c) Use of gift		(d) Description of how gift is held	
Part I		3		3	
	<u></u>				
		(e) Transfer of gift			
	Transferee's name, addres		Rela	ationship of transferor to transferee	
(a)	(b) Purpose of gift	(c) Use of gift		(d) Description of how gift is held	
(a) No. from Part I	Purpose of gift	Use of gift		Description of now gift is neig	
				<del> </del>	
	<b></b>			†	
		(e) Transfer of gift			
	Transferee's name, addres	Transfer of gift ss. and ZIP + 4	Rela	ationship of transferor to transferee	
	Transfered 5 frame, duties			and the state of t	
			<u> </u>		
			<i></i> -		

Partill Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8) or (10)

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### **FEDERAL STATEMENTS**

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# JONATHAN & KATHLEEN ALTMAN FOUNDATION C/O AVALON TRUST

85-0470898

STATEMENT 1
FORM 990-PF, PART I, LINE 11
OTHER INCOME

INCOME/LOSS PASSTHROUGH

	(A) REVENUE PER BOOKS		 (B) NET INVESTMENT INCOME		(C) ADJUSTED NET INCOME	
TOTAL	\$	79,441. 79,441.	\$ 0.	\$	0.	

#### STATEMENT 2 FORM 990-PF, PART I, LINE 16B ACCOUNTING FEES

			(A) PENSES R BOOKS	IN	(B) NET VESTMENT INCOME	AI NET	(C) DJUSTED <u>INCOME</u>	_	(D) CHARITABLE PURPOSES
AUDIT PREPARATION FEES TAX PREPARATION FEES	TOTAL	\$ <u>\$</u>	5,410. 3,585. 8,995.	\$	2,705. 1,793. 4,498.	s	0.	\$	2,705. 1,792. 4,497.

#### STATEMENT 3 FORM 990-PF, PART I, LINE 16C OTHER PROFESSIONAL FEES

	(A) EXPENSES <u>PER BOOKS</u>	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE <u>PURPOSES</u>
ACCOUNT MANAGEMENT FEES	TOTAL \$ 107,042 \$ 107,042	<del></del>	\$ 0.	\$ 53,521. \$ 53,521.

#### STATEMENT 4 FORM 990-PF, PART I, LINE 18 TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX FOREIGN TAX ON DIVIDEND INCOME NEW MEXICO PUBLIC REGULATION COMMIS	\$ 4,500. 3,582. SSION	\$ 3,582.		
TOTAL	\$ 8,092.	10. \$ 3,592.	\$0.	\$ 0.

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## **FEDERAL STATEMENTS**

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# JONATHAN & KATHLEEN ALTMAN FOUNDATION C/O AVALON TRUST

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STATEMENT 5		
FORM 990-PF, PART I	LINE	23
OTHER EXPENSES	,	

		(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADR FEES PASSTHROUGH	INVESTMENT INTEREST EX	\$ 422.	\$ 422.		
PASSIMOUGH	INVESIMENT INTEREST EX	2,459.	2,459.		
	TOTAL	\$ 2,881.	\$ 2,881.	\$ 0.	\$ 0.

#### STATEMENT 6 FORM 990-PF, PART II, LINE 10B INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
PREFERRED STOCK COMMON STOCK EQUITY FUNDS	COST COST COST TOTAL	\$ 0. 6,328,453. 857,821. \$ 7,186,274.	\$ 0. 8,643,342. 1,004,518. \$ 9,647,860.

#### STATEMENT 7 FORM 990-PF, PART II, LINE 10C INVESTMENTS - CORPORATE BONDS

CORPORATE BONDS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
CORPORATE BONDS BOND FUNDS	COST COST TOTAL	\$ 212,435. 1,599,413. \$ 1,811,848.	\$ 200,294. 1,610,152. \$ 1,810,446.	

#### STATEMENT 8 FORM 990-PF, PART II, LINE 13 INVESTMENTS - OTHER

	VALUATION <u>METHOD</u>	 BOOK VALUE	F	AIR MARKET VALUE
OTHER INVESTMENTS				
PARTNERSHIP INVESTMENTS PUBLICLY TRADED PARTNERSHIPS	COST COST	\$ 586,186. 405,305.	\$	714,592. 949,950.
	TOTAL	\$ 991,491.	\$	1,664,542.

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### **FEDERAL STATEMENTS**

JONATHAN & KATHLEEN ALTMAN FOUNDATION C/O AVALON TRUST

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STATEMENT 9 FORM 990-PF, PART III, LINE 3 OTHER INCREASES

NONTAXABLE DISTRIBUTIONS

TOTAL \$ 6,982.

#### STATEMENT 10 FORM 990-PF, PART IV, LINE 1 CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

<u>ITEM</u> 1 2 3 4 5	(A) DESCRIPTION  LONG TERM CAPITAL GAIN DISTRIBUTIONS CAPITAL GAIN INCOME FROM PASSTHROUGHS 12953.368 MFS EMERGING MKTS BOND FUND 5165.289 MFS EMERGING MKTS BOND FUND 5366.162 MFS EMERGING MKTS BOND FUND 24271.845 VANGUARD INTERM-TERM INV GRADE BD	(B) HOW ACQUIRED PURCHASED PURCHASED PURCHASED PURCHASED PURCHASED	(C) DATE ACQUIRED VARIOUS VARIOUS 10/15/2010 12/30/2011 8/24/2012	(D) DATE SOLD VARIOUS VARIOUS VARIOUS 8/27/2013 6/25/2013
7 8	1945.309 VANGUARD INTERM-TERM INV GRADE BD 13983.908 VANGUARD SHORT-TERM INVT GR FD ADM		11/21/2008 12/22/2008	VARIOUS 2/27/2013
9 10 112 13 14 15 16 17 18 19 20 12 21 22 22 23 23 33 33 33 33 33 33 33 33	150000 MCKESSON CORP 5.250% 6700 FIRST REPUBLIC PERPETUAL SERIES C 4500 FIRST REPUBLIC PERPETUAL SERIES C 500 ECOLAB INC 1000 ECOLAB INC 700 CUMMINS INC 700 CUMMINS INC 100 DANAHER CORP 2400 VODAFONE GROUP PLC ADR 3500 DIRECTV 1500 LKQ CORP 2250 LKQ CORP 2250 LKQ CORP 1150 STANLEY BLACK & DECKER 1150 STANLEY BLACK & DECKER 5500 BANCO BRADESCO ADRS 1500 BANCO BRADESCO ADRS 1500 BANCO BRADESCO ADRS 1500 TRAVELERS GROUP INC 500 THERMO FISHER SCIENTIFIC 750 IBM CORP 3000 ORACLE CORP 1000 ORACLE CORP 1000 QUALCOMM INC 3000 RACKSPACE HOSTING INC 570 PERRIGO COMPANY	PURCHASED DONATED DONATED DONATED DONATED PURCHASED	2/14/2011 12/05/2011 11/15/2012 12/17/2013 12/11/2012 2/18/2011 11/10/2011 11/22/2011 3/13/2008 12/05/2011 5/04/2012 9/04/2010 9/22/2010 2/25/2011 4/10/2012 5/15/2012 9/10/2010 1/07/2011 12/30/2011 6/25/2008 9/01/2011 12/01/2010 2/08/2008 12/11/2012 1/20/2010 2/22/2013 5/07/2013 5/07/2013 5/31/2013	VARIOUS 3/01/2013 12/30/2013 12/30/2013 4/03/2013 10/25/2013 10/23/2013 4/03/2013 2/20/2013 10/07/2013 VARIOUS 1/28/2013 10/16/2013 2/15/2013 2/15/2013 2/15/2013 2/15/2013 2/15/2013 6/06/2013 10/07/2013 6/18/2013 6/18/2013 6/18/2013 6/18/2013 12/19/2013 12/19/2013
<u>ITEM</u> 1 2 3 4	GROSS DEPREC. COST GAIN	(I) (J) FMV ADJ. F /31/69 12/31	BAS. EXCESS	(L) GAIN (LOSS) \$ 17,561. 298,146. -13,485. -666.

### **FEDERAL STATEMENTS**

JONATHAN & KATHLEEN ALTMAN FOUNDATION C/O AVALON TRUST

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STATEMENT 10 (CONTINUED) FORM 990-PF, PART IV, LINE 1 CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM - 5 6 7 8 9 10 11 12 13 14 15 16 17	(E) GROSS SALES 77,261. 249,466. 19,995. 149,930. 150,000. 131,993. 87,524. 39,697. 72,679. 94,243. 94,243. 6,108. 84,410.	(F) DEPREC. ALLOWED	(G) COST BASIS 85,035. 200,035. 16,833. 150,213. 157,854. 167,500. 89,415. 36,265. 48,400. 68,818. 62,611. 3,588. 65,064.	(H) GAIN (LOSS) -7,774. 49,431. 3,1622837,85435,5071,891. 3,432. 24,279. 25,425. 31,632. 2,520. 19,346.	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I)-(J)	(L) GAIN (LOSS) \$ -7,774. 49,431. 3,162. -283. -7,854. -35,507. -1,891. 3,432. 24,279. 25,425. 31,632. 2,520. 19,355.
5	//,261.		85,035. 200 035	-/,//4.				
7	19 995							
ά			150,000.					
9	150,000		157 854					
	131,993.		167,500.					-35,507.
			89,415.	-1.891.				-1,891.
	39,697.		36,265.					
	72,679.							
		•	68,818.	25,425.				25,425.
				31,632.				31,632.
			65,064.					
18	168,613.		168,968.	-355.				-355.
19	48,419.		15,046.	33,373.				33,373.
20	62,902.		23,378.	39,524.				39,524.
21	52,480.		26,621. 86,248.	25,859.				25,859.
22 23	88,158. 88,158.		78,418.	1,910. 9,740.				1,910. 9,740.
24	100,461.		101,253.	-792.				-792.
25	27,398.		29,562.	-2,164.				-2,164.
26	54,797.		50,394.	4,403.				4,403.
27	84,883.		45,189.	39,694.				39,694.
28	43,177.		27,358.	15,819.				15,819.
29	136,901.		108,308.	28,593.				28,593.
30	103,167.		57,480.	45,687.				45,687.
31	68,778.		64,680.	4,098.				4,098.
32	34,389.		24,857.	9,532.				9,532.
33	62,783.		48,357.	14,426.				14,426.
34	108,160.		163,000.	-54,840.				-54,840.
35	88,549.		66,085.	22,464.				22,464.
36	175,545.		130,983.	44,562.			mom* t	44,562.
							TOTAL	\$ 689,007.

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	 AMOUNT
DOCTORS WITHOUT BORDERS E. 39TH ST. 8TH FLOOR NY, NY 10016	NONE	PUBLIC	DONATION	\$ 15,000.
KITCHEN ANGELS 1222 SILER RD SANTA FE, NM 87507	NONE	PUBLIC	DONATION	15,000.

# FEDERAL STATEMENTS

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# JONATHAN & KATHLEEN ALTMAN FOUNDATION C/O AVALON TRUST

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NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
MAHA BODHI SOCIETY-SANTA FE 1404 CERRO GORDO RD SANTA FE, NM 87501	NONE	PUBLIC	DONATION	\$ 6,000.
MUSEUM OF NM FOUNDATION 116 LINCOLN AVE SANTA FE, NM 87501	NONE	PUBLIC	DONATION	2,000.
SANTA FE CONSERVATION TRUST 316 E MARCY SANTA FE, NM 87501	NONE	PUBLIC	DONATION	15,000.
SITE SANTA FE 1606 PASEO DE PERALTA SANTA FE, NM 87501	NONE	PUBLIC	DONATION	1,000.
SPIRIT ROCK MEDITATION CENTER 5000 SIR FRANCIS DRAKE BLVD WOODACRE, CA 94973	NONE	PUBLIC	DONATION	4,000.
TIBETAN NUNS PROJECT 2288 FULTON ST #312 BERKELEY, CA 94704	NONE	PUBLIC	DONATION	400.
THE TRUST FOR PUBLIC LAND 116 NEW MONTGOMERY SAN FRANCISCO, CA 94105	NONE	PUBLIC	DONATION	20,000.
INTERNATNL RESCUE COMMITTEE 122 E 42ND STREET NY, NY 10168	NONE	PUBLIC	DONATION	70,000.
NATURAL RESOURCES DEFENSE COUNCIL 40 W. 20TH ST NY, NY 10011	NONE	PUBLIC	DONATION	60,000.
GRAND CANYON TRUST 2601 N. FORT VALLEY RD FLAGSTAFF, AZ 86001	NONE	PUBLIC	DONATION	5,000.
SAN FRANCISCO ZEN CENTER 300 PAGE STREET SAN FRANCISCO, CA 94102	NONE	PUBLIC	DONATION	8,000.
CITY & COUNTRY SCHOOL 146 W 13TH ST NEW YORK, NY 10011	NONE	PUBLIC	DONATION	3,000.

# **FEDERAL STATEMENTS**

# JONATHAN & KATHLEEN ALTMAN FOUNDATION C/O AVALON TRUST

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NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
LAMA FOUNDATION 1895 LAMA MOUNTAIN ROAD QUESTA, NM 87556	NONE	PUBLIC	DONATION	\$ 5,000.
MAITRI PO BOX 697 SANTA CLARA, CA 95052	NONE	PUBLIC	DONATION	2,000.
THE FOOD DEPOT 1222 SILER ROAD SANTA FE, NM 87507	NONE	PUBLIC	DONATION	15,000.
PLOUGHSHARES FUND FORT MASON CENTER SAN FRANCISCO, CA 94123	NONE	PUBLIC	DONATION	5,000.
ENVIRONMENTAL DEFENSE FUND 257 PARK AVE SOUTH NEW YORK, NY 10010	NONE	PUBLIC	DONATION	25,000.
ST ELIZABETH SHELTER 804 ALARID ST SANTA FE, NM 87505	NONE	PUBLIC	DONATION	15,000.
ZEN HOSPICE PROJECT 273 PAGE STREET SAN FRANCISCO, CA 94102	NONE	PUBLIC	DONATION	3,000.
CANCER FOUNDATION FOR NEW MEXICO 490-A W. ZIA ROAD SANTA FE, NM 87505	NONE	PUBLIC	DONATION	10,000.
SAN FRANCISCO FRIENDS SCHOOL 250 VALENCIA ST SAN FRANCISCO, CA 94103	NONE	PUBLIC	DONATION	20,000.
KUNM 1 UNIVERSITY OF NEW MEXICO ALBUQUERQUE, NM 87131	NONE	PUBLIC	DONATION	1,000.
NM COMMUNITY FOUNDATION 502 WEST CORDOVA RD STE 1 SANTA FE, NM 87505	NONE	PUBLIC	DONATION	3,000.
RIWOCHE TIBETAN BUDDHIST TEMPLE 28 HEINTZMAN STREET TORONTO, CANADA	NONE	PUBLIC	DONATION	5,000.

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## **FEDERAL STATEMENTS**

# JONATHAN & KATHLEEN ALTMAN FOUNDATION C/O AVALON TRUST

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NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
KNME 1130 UNIVERSITY BLVD. NE ALBUQUERQUE, NM 87102	NONE	PUBLIC	DONATION	\$ 2,000.
SHORTGRASS MUSIC FESTIVAL PO BOX 604 CIMARRON, NM 87714	NONE	PUBLIC	DONATION	2,000.
SANTA FE INSTITUTE 1399 HYDE PARK ROAD SANTA FE, NM 87501	NONE	PUBLIC	DONATION	2,000.
RIVERDALE COUNTRY SCHOOL 5250 FIELDSTON ROAD BRONX, NY 10471	NONE	PUBLIC	DONATION	2,000.
SHECHEN-DILGO KHYENTSE FELLOWSHIP 511 AVENUE OF THE AMERICAS NEW YORK, NY 10011	NONE	PUBLIC	DONATION	70,000.
SOUTHERN UTAH WILDERNESS ALLIANCE 425 EAST 100 SOUTH SALT LAKE CITY, UT 84111	NONE	PUBLIC	DONATION	5,000.
TRUST FOR PUBLIC LAND-NEW MEXICO 1600 LENA STREET, BLDG. C SANTA FE, NM 87505	NONE	PUBLIC	DONATION	10,000.
UPPER GILA WATERSHED ALLIANCE PO BOX 383 GILA, NM 88038	NONE	PUBLIC	DONATION	5,000.
NEW MEXICO WILDERNESS ALLIANCE 341 EAST ALAMEDA STREET SANTA FE, NM 87501	NONE	PUBLIC	DONATION	5,000.
CENTER FOR BIOLOGICAL DIVERSITY PO BOX 710 TUCSON, AZ 85702	NONE	PUBLIC	DONATION	10,000.
WESTERN ENVIROMENTAL LAW CENTER 1216 LINCOLN STREET EUGENE, OR 97401	NONE	PUBLIC	DONATION	5,000.

## **FEDERAL STATEMENTS**

JONATHAN & KATHLEEN ALTMAN FOUNDATION C/O AVALON TRUST

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NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	 AMOUNT
ALLIANCE FOR THE EARTH PO BOX 8031 SANTA FE, NM 87504	NONE	PUBLIC	DONATION	\$ 8,000.
EWAM AT PEMA KHANDRO LING 1221 LUISA STREET, STE. A SANTA FE, NM 87505	NONE	PUBLIC	DONATION	5,000.
RAINFOREST ACTION NETWORK 221 PINE STREET, 5TH FLOOR SAN FRANCISCO, CA 94104	NONE	PUBLIC	DONATION	5,000.
SONOMA MOUNTAIN ZEN CENTER 6367 SONOMA MOUNTAIN ROAD SANTA ROSA, CA 95404	NONE	PUBLIC	DONATION	5,000.
NEW MEXICO ENVIRONMENTAL LAW CENTER 1405 LUISA ST #5 SANTA FE, NM 87505	NONE	PUBLIC	DONATION	7,000.
DHARMA SANGHA CRESTONE MOUNTAIN ZEN CTR 2000 EAST DREAMWAY CRESTONE, CO 81131	NONE	PUBLIC	DONATION	27,500.
BLACK MESA WATER COALITION PO BOX 613 FLAGSTAFF, AZ 86002	NONE	PUBLIC	DONATION	5,000.
COLUMBUS ZOO & AQUARIUM 4850 POWELL RD POWELL, OH 43065	NONE	PUBLIC	DONATION	25,000.
ONE ACRE FUND 1742 TATUM ST FALCON HEIGHTS, MN 55113	NONE	PUBLIC	DONATION	5,000.
RADIUS BOOKS 227 E PALACE AVE STE W SANTA FE, NM 87501	NONE	PUBLIC	DONATION	1,000.
THEATER GROTTESCO 1000 CORDOVA PLACE #8400 SANTA FE, NM 87505	NONE	PUBLIC	DONATION	2,000.
THE STORYDANCER PROJECT PO BOX 31099 SANTA FE, NM 87594	NONE	PUBLIC	DONATION	5,000.

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## **FEDERAL STATEMENTS**

# JONATHAN & KATHLEEN ALTMAN FOUNDATION C/O AVALON TRUST

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NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE ( GRANT	OF AMOUNT
TSOKNYI HUMANITARIAN FOUNDATION 39575 COUNTY ROAD 33 STEAMBOAT SPRINGS, CO 80487	NONE	PUBLIC	DONATION	\$ 40,000.
SANTA FE SCHOOL FOR THE ARTS & SCIENCES 5912 JAGUAR DRIVE SANTA FE, NM 87507	NONE	PUBLIC	DONATION	1,000.
ZAP PERFORMANCE PROJECTS INC 107 LA JOYA ROAD SANTA FE, NM 87501	NONE	PUBLIC	DONATION	3,000.
NEW MEXICO PBS 1130 UNIVERSITY BLVD NE ALBUQUERQUE, NM 87102	NONE	PUBLIC	DONATION	500.
AUTISTRY STUDIOS 137 GRANADA DRIVE CORTE MADERA, CA 94925	NONE	PUBLIC	DONATION	20,000.
GILA RESOURCES INFORMATION PROJECT 305A NORTH COOPER STREET SILVER CITY, NM 88061	NONE	PUBLIC	DONATION	15,000.
ELEPHANT AID INTERNATIONAL 4128 BUFFALO RD HOHENWALD, TN 38462	NONE	PUBLIC	DONATION	10,000.
				TOTAL \$ 641,400.