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Form 990-PF

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

OMB No 1545 0052

2013

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 cal	endar year 2013, or tax year beginning	, 2013	, and ending	,	
	JESS & SHEILA SCHWARTZ LY FOUNDATION			A Employer identification num 86-0942313	
15 B	ILTMORE ESTATES DRIVE NIX, AZ 85016-2821			Telephone number (see the (602) 274-795	
	eck all that apply: Initial return Final return Address change	Initial return of a form Amended return Name change	mer public charity	C If exemption application isD 1 Foreign organizations, chec	k here
H C	heck type of organization X Section 50)1(c)(3) exempt private		2 Foreign organizations meet here and attach computation	ing the 85% test, check
	Section 4947(a)(1) nonexempt charitable air market value of all assets at end of year from Part II, column (c), line 16)	counting method: XC	ash Accrual	If private foundation status under section 507(b)(1)(A)	, check here
_ \$	2,637. (Part	Other (specify) I, column (d) must be of	r cash basis)	F If the foundation is in a 60- under section 507(b)(1)(B)	nonth termination , check here
Part	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not neces sarily equal the amounts in column (a) (see instructions))	(a) Revenue and expenses per books	(b) Net investmen income	t (c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
	Contributions, gifts, grants, etc, received (att sch)	645,000.			
	2 Ck if the foundn is not req to att Sch B 3 Interest on savings and temporary cash investments		<u></u>		
	4 Dividends and interest from securities				
	5 a Gross rents b Net rental income				
	or (loss)		1		
R E	6 a Net gain/(loss) from sale of assets not on line 10 b Gross sales price for all				
V E	7 assets on line 6a Capital gain net income (from Part IV, line 2)	1			
Ñ	8 Net short-term capital gain				····
Ē	9 Income modifications 10a Gross sales less less				
	allowances	<u></u>			
	b Less Cost of goods sold		_		
	c Gross profit/(loss) (att sch)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	645,000.		0. 0.	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages.15 Pension plans, employee benefits			_	
	16a Legal fees (attach schedule)				
A D M	b Accounting fees (attach sch) SEE ST	1,445.	, ,		
i N	c Other prof fees (attach sch)			1111 P & Style .	
OPER	17 Interest			\	
PERA SAOZ	18 Taxes (attach schedule)(see instrs) 19 Depreciation (attach		- 1		
	sch) and depletion .				
⇒3 ¼ v̄	20 Occupancy				· · · · · · · · · · · · · · · · · · ·
AZD EXP	22 Printing and publications				
- r	23 Other expenses (attach schedule)	0.550			
C N S	SEE STATEMENT Total operating and administrative	9,560.			
ES	expenses. Add lines 13 through 23	11,005.			
4	25 Contributions, gifts, grants paid PART XV				633,995.
OENTRO O	26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12:	645,000.	<u> </u>	0. 0.	633,995.
	a Excess of revenue over expenses		1		
	and disbursements	0.	<u></u>		
	b Net investment income (if negative, enter -0-)		ļ	0.	
BAA F	C Adjusted net Income (if negative, enter -0-) for Paperwork Reduction Act Notice, see in	structions.	<u></u>	TEEA0504L 10/18/13	Form 990-PF (2013)

Cash - non-inferest-bearing 1,642, 2,637	Dart		Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	f year
2 Savings and temporary cash investments 3 Accounts receivable Less allowance for doubtful accounts * 4 Piedges receivable Less allowance for doubtful accounts * 5 Grants receivable 1 Less allowance for doubtful accounts * 5 Grants receivable 6 Receivable doe from differs, directors, trustes, and other dospitalitied persons (lattor doubtful accounts * 5 Grants receivable 7 Other interest and loss receivable (lattors of) * 1 Less: allowance for doubtful accounts * 1 Investments of use and experiment of doubtful accounts * 2 Investments — Use and state government obligations (attach schedule) 2 Investments — Carponia boxis (attach schedule) 2 Investments — Carponia boxis (attach schedule) 3 Investments — Carponia boxis (attach schedule) 4 Less accountated deprecation (attach schedule) 4 Less accountated deprecation (attach schedule) 5 Cher assets (describe * 15 Total assets (seconde * 16 Total assets (or be compliced by all Niers — 17 Accounts payable and accrued expenses 18 Grants payable 19 Defered evenue 20 Loans from offices, directins, trustees, a other dosqualited persons 21 Investments — Grants payable 3 Carponia by the displaced of the schedule) 4 Bard (account of the schedule) 5 Carponia for devenue 5 Carponia for devenue 6 Description of the schedule) 7 Total liabilities (describe * 7 Total liabilities and the accurated and schedule) 7 Total liabilities and the accurated and schedule in the schedule and schedule and schedule in the schedule and schedule in the sche	rait	<u></u> ,	(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
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R S 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances (see instructions) 1, 642. 2, 637. Total liabilities and net assets/fund balances (see instructions) 1, 642. 2, 637. Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1, 642. 2 Enter amount from Part I, line 27a 2 0. 3 Other increases not included in line 2 (itemize) SEE STATEMENT 3 3 2, 637. 4 Add lines 1, 2, and 3 4 4, 279. 5 Decreases not included in line 2 (itemize) SEE STATEMENT 4 5 1, 642.	TA	27	Capital stock, trust principal, or current funds .	1,642.	2,637.	
Total net assets or fund balances (see instructions) 1,642. 2,637. Part III Analysis of Changes in Net Assets or Fund Balances (see instructions) 1,642. 2,637. Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3	SN	28	Paid-in or capital surplus, or land, building, and equipment fund]
R S 30 Total net assets or fund balances (see instructions) 31 Total liabilities and net assets/fund balances (see instructions) 1,642. 2,637. Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 SEE STATEMENT 4 5 1,642. 2,637. 4 1,642. 2,637.	OE	29	Retained earnings, accumulated income, endowment, or other funds .			
(see instructions) Part III Analysis of Changes in Net Assets or Fund Balances Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1	RS		,	1,642.	2,637.	
Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 SEE STATEMENT 4 5 1,642.		31		1 642	2 637	
1 Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) SEE STATEMENT 3 4 4,279. 5 Decreases not included in line 2 (itemize) SEE STATEMENT 4 5 1,642.	Parl		· · · · · · · · · · · · · · · · · · ·		2,031.	<u> </u>
end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 SEE STATEMENT 4 1 1,642. 2 0. 3 2,637. 4 4,279. 5 1,642.			· · · · · · · · · · · · · · · · · · ·		aree with	<u> </u>
3 2,637. 4 Add lines 1, 2, and 3		end-	of-year figure reported on prior year's return)	ana (a), ime so (must a	1	T
4 Add lines 1, 2, and 3						0.
5 Decreases not included in line 2 (itemize) SEE STATEMENT 4 5 1,642.				3		2,637.
E LOTAL DAT DECATE OF BUILDINGS AT AND AT MARK (Inc. 4 minute line E) Part II column (b) line 20 I C I C I A CAR						
BAA TEFAGGO 107/09/13 Form 990-PF (2013)		rotal			ine 30 6	2,637.

(a) List and describe 2-story brick warehouse	e the kind(s) of property sold (e.g., rese, or common stock, 200 shares ML	eal estate, C Company)	(b) How acquired P — Purchase D — Donation	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a N/A					<u> </u>
b				 	
C	· · · · · · · · · · · · · · · · · · ·				
d			- v		
e		-			
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sal	sis le	(h) Gain or (e) plus (f) m	(loss) inus (g)
a					
b					
<u> </u>					
d					
e		No. 600 - 10/21/00			
(i) Fair Market Value	ving gain in column (h) and owned by (i) Adjusted basis	(k) Excess of column		(I) Gains (Col ain minus column (I	
as of 12/31/69	as of 12/31/69	over column (j), if a		an -0-) or Losses (fi	
a					
<u>b</u>	 				
					<u></u>
				-	
2 Capital gain net income or (ne	et capital loss) If gain, also	enter in Part I, line 7 ter -0- in Part I, line 7	- 2		
3 Net short-term capital gain or	(loss) as defined in sections 1222(5)		2		
ın Part I, Iıne 8	e 8, column (c) (see instructions) If	لــ	3		
The state of the s	r Section 4940(e) for Reduce to foundations subject to the section	 _		N/A	
If 'Yes,' the foundation does not qua	ction 4942 tax on the distributable an ilify under section 4940(e) Do not co	mplete this part		Yes	☐ No
	in each column for each year, see th		ig any entries.	(4)	
(a) Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	Net value of noncharitable-use as:	sets (col	(d) Distribution umn (b) divided	
2012					
2011					
2010					
2009					
2008				· - -	
2 Total of line 1, column (d)			2		·
	he 5-year base period – divide the to in has been in existence if less than !		3		
4 Enter the net value of noncha	ritable-use assets for 2013 from Part	X, line 5	4		
5 Multiply line 4 by line 3			5		
6 Enter 1% of net investment in	come (1% of Part I, line 27b)		6		
7 Add lines 5 and 6			7		
8 Enter qualifying distributions f	rom Part XII, line 4		8		
If line 8 is equal to or greater Part VI instructions.	than line 7, check the box in Part VI,	line 1b, and complete that	part using a 19	% tax rate See	the
BAA				- Ear	m 990-PF (2013)

Part	VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instruction	5)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here and enter 'N/A' on line 1			
	Date of ruling or determination letter: (attach copy of letter if necessary – see instrs)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V,			0.
	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)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-).			0.
3	Add lines 1 and 2			0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			0.
6	Credits/Payments			
а	2013 estimated tax pmts and 2012 overpayment credited to 2013			
b	Exempt foreign organizations — tax withheld at source 6b			
С	Tax paid with application for extension of time to file (Form 8868) . 6 c			
d	Backup withholding erroneously withheld 6 d			
7	Total credits and payments Add lines 6a through 6d . 7			0.
8	Enter any penalty for underpayment of estimated tax. Check here If Form 2220 is attached 8			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			0.
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
	Enter the amount of line 10 to be. Credited to 2014 estimated tax			
Par	VII-A Statements Regarding Activities			
1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	No
	participate or intervene in any political campaign?	1 a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1 b		Х
	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		·	
С	Did the foundation file Form 1120-POL for this year?	1 c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
	(1) On the foundation >\$ 0. (2) On foundation managers >\$ 0.			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers • \$ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X
2	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
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4 a		X / 2
	olf 'Yes,' has it filed a tax return on Form 990-T for this year?	4 b	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	┝╩┤		X
_	If 'Yes,' attach the statement required by General Instruction T			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or			
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict			
	with the state law remain in the governing instrument?	6		X
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	7	Х	
8 a	Enter the states to which the foundation reports or with which it is registered (see instructions)			
	AZ			
t	of 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>	8 b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If 'Yes,' complete Part XIV	9		Х
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names			
BAA	and addresses SEE STATEMENT 5	10 rm 990	X)-PF (2	2013)

rar	t vii-A	Statements Regarding Activities (Continued)			
11	At any t	ime during the year, did the foundation, directly or indirectly, own a controlled entity ne meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		<u>x</u>
	advisory	oundation make a distribution to a donor advised fund over which the foundation or a disqualified person had privileges? If 'Yes,' attach statement (see instructions)	12		_X_
13	Did the	foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website	address • N/A			
14	The boo	sks are in care of ► FRANK SCHWARTZ Telephone no ► (602)		<u>-795</u>	5
	Located				
15		4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	N/A	,	LI A
		er the amount of tax-exempt interest received or accrued during the year		Yes	N/A No
16	At any ti bank, se	me during calendar year 2013, did the foundation have an interest in or a signature or other authority over a ecurities, or other financial account in a foreign country?	16	103	X
_	foreign	instructions for exceptions and filing requirements for Form TD F 90-22.1. If 'Yes,' enter the name of the country ►			
Par		Statements Regarding Activities for Which Form 4720 May Be Required			
		m 4720 if any item is checked in the 'Yes' column, unless an exception applies.	<u> </u>	Yes	No
1 a		the year did the foundation (either directly or indirectly):			
	``,	age in the sale or exchange, or leasing of property with a disqualified person? Yes X No			
	disc	row money from, lend money to, or otherwise extend credit to (or accept it from) a qualified person? X No			
		nish 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? . Yes X No			
	(5) Trainfor	nsfer any income or assets to a disqualified person (or make any of either available the benefit or use of a disqualified person)? X No		:	
	(6) Agr four of g	ee to pay money or property to a government official? (Exception. Check 'No' if the indation agreed to make a grant to or to employ the official for a period after termination government service, if terminating within 90 days) Yes X No			
ı	If any a Regulat	nswer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in ions section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1 b	N	/A
	Organiz	rations relying on a current notice regarding disaster assistance check here			
•	Did the that we	foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, re not corrected before the first day of the tax year beginning in 2013?	1 c		Х
2	Taxes of private	on failure to distribute income (section 4942) (does not apply for years the foundation was a operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
	a At the e and 6e,	end of tax year 2013, did the foundation have any undistributed income (lines 6d Part XIII) for tax year(s) beginning before 2013? Yes X No			
		list the years ▶ 20 , 20 , 20 , 20 .			
ı	b Are the	re any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) g to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to		_	
	all year	is listed, answer 'No' and attach statement — see instructions).	2 t	N	/A
	c If the p	rovisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
	▶ 20 _	_ , 20 , 20 , 20		1	
3	a Did the enterpr	foundation hold more than a 2% direct or indirect interest in any business use at any time during the year?			
I	b If 'Yes,	did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation			
	by the	ualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or		1	
	(3) the	lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to ine if the foundation had excess business holdings in 2013)	31		/A
			31	<u>' </u>	Y A
4	a Did the charital	foundation invest during the year any amount in a manner that would jeopardize its ble purposes?	48	<u> </u>	X
	h Did the	foundation make any investment in a prior year (but after December 31, 1969) that could			
	leopard	ize its charitable purpose that had not been removed from jeopardy before the first day of		J	ا ـا
DA 1		year beginning in 2013?	4 t	1	(2013)
BAA	4		טוווו ש:	7U-L	(2013)

orm 990-PF (2013) THE JESS & SHEILA			<u>86-094</u>	2313	Page	: 6
Part VII-B Statements Regarding Activiti		4720 May Be Req	uired (continued)		, , ,	_
5 a During the year did the foundation pay or incu	•	- (t 404E(-))2				
(1) Carry on propaganda, or otherwise attemp	J		Yes X	No		
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	ition drive?		H : H	No		
(3) Provide a grant to an individual for travel,	study, or other similar p	purposes?	∐ Yes X	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	ganization described ictions)	Yes X	No		!
(5) Provide for any purpose other than religio educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children i	, literary, or or animals?	Yes X	No		
b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53.4945 or in (see instructions)?	the transactions fail to contact and the contact and the contact and the contact are the conta	qualify under the excep ling disaster assistance	tions	5 b	N/A	
Organizations relying on a current notice rega	rding disaster assistanc	e check here	▶ □	1	17/11	_
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon	the foundation claim exe sibility for the grant?	emption from the	. N/A Yes	No		
If 'Yes,' attach the statement required by Regi	ulations section 53 4945	5-5(d)				
6 a Did the foundation, during the year, receive are on a personal benefit contract?.	ny funds, directly or indi	rectly, to pay premium	S Yes X	No		
b Did the foundation, during the year, pay prem	iums, directly or indirect	tly, on a personal bene	fit contract?	6 b	X	<u>(</u>
If 'Yes' to 6b, file Form 8870 7 a At any time during the tax year, was the found	dation a norty to a prob	ibited tay shelter transs	action? Yes X	No		
b If 'Yes,' did the foundation receive any procee				/A 7b	 	
Part VIII Information About Officers, D						_
and Contractors						
1 List all officers, directors, trustees, foundation	,					_
(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) Expens other a	se accoun allowances	
SHEILA SCHWARTZ	PRES/DIR	0.	0.			0 .
15 BILTMORE ESTATES DRIVE	1.00					
PHOENIX, AZ 85016-2821				<u> </u>		_
LESLEY (SCHWARTZ) HAMMER	DIRECTOR	0.	0.		(0.
15 BILTMORE ESTATES DRIVE	0					
PHOENIX, AZ 85016	DIDECTOR		ļ	 -		_
ABBY I. SCHWARTZ	DIRECTOR	0.	0.			0 .
15 BILTMORE ESTATES DRIVE	1.00			ĺ		
PHOENIX, AZ 85016 FRANK L. SCHWARTZ	TREAS/SEC/DI	0.	0.	<u> </u>		0
15 BILTMORE ESTATES DRIVE	1.00	0.	0.		,	٠.
PHOENIX, AZ 85016	1.00					
2 Compensation of five highest-paid employees (o	ther than those included	on line 1 – see instructio	ns). If none, enter 'NONE.	1		_
(a) Name and address of each employee	(b) Title, and average	(c) Compensation	(d)Contributions to	(e) Expens		
paid more than \$50,000	hours per week devoted to position		employee benefit plans and deferred compensation	other a	allowances	5
NONE			<u> </u>			_
						_
		•				
			·			
	ļ					
						_
	1					
	 		 			-
	1			İ		
	<u> </u>	<u> </u>	<u> </u>			
Total number of other employees paid over \$50,000	0 TEEA0306L 0	7/10/13	. •	Form qq i	0-PF (2013	<u>0</u>
	I EEAUSUGE U	,,,,,,,,		1 01111 330	(-013	

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Part VIII Information About Officers, Directors, Trustees, Fand Contractors (continued)	oundation Managers, Highly Paid E	mployees,
3 Five highest-paid independent contractors for professional services ((see instructions). If none, enter 'NONE.'	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	· 	
	· - -	
	·	}
	· -]	
T-1-1 ()		
Total number of others receiving over \$50,000 for professional services	··	0
Part X:A: Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant s	tatistical information such as the number of	Expenses
organizations and other beneficiaries served, conferences convened, research papers produced, et	<u>.c</u>	ZAPONSOS
1 <u>N/A</u>		
		1
2		
*		
		-
3		
		ļ
4		-
		-
		<u> </u>
Rart XB Summary of Program-Related Investments (see II	nstructions)	
Describe the two largest program-related investments made by the foundation dur	ring the tax year on lines 1 and 2	Amount
1		
N/A		
2		
		1

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All other program-related investments See instructions

Total. Add lines 1 through 3

	-0942313	Page 8
Part X Minimum Investment Return (All domestic foundations must complete this part. For see instructions.)	reign found	ations,
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	1 a	
b Average of monthly cash balances	1 b	1,511.
c Fair market value of all other assets (see instructions)	1 c	1,511.
d Total (add lines 1a, b, and c)	1 d	1,511.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation)		
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	1,511.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	23.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,488.
6 Minimum investment return. Enter 5% of line 5	6	74.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private opera	ling founda	
and certain foreign organizations check here ▶ □ and do not complete this part.)		
1 Minimum investment return from Part X, line 6	1	74.
2 a Tax on investment income for 2013 from Part VI, line 5 2a		
b Income tax for 2013 (This does not include the tax from Part VI)		
c Add lines 2a and 2b	2 c	
3 Distributable amount before adjustments Subtract line 2c from line 1	3	74.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	74.
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	74.
Part XII Qualifying Distributions (see Instructions)		
Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes. a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26	1 a	633,995.
b 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	
3 Amounts set aside for specific charitable projects that satisfy the a Suitability test (prior IRS approval required)	3 a	

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

4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4

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)

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633,995.

633,995.

3 a 3 b

4

5

6

b Cash distribution test (attach the required schedule)

Adjusted qualifying distributions. Subtract line 5 from line 4

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				74.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years 20, 20, 20	· .	0.		
3 Excess distributions carryover, if any, to 2013.				
a From 2008				
b From 2009				İ
c From 2010				
d From 2011 e From 2012				i
f Total of lines 3a through e	·			
4 Qualifying distributions for 2013 from Part	0.			
XII, line 4 ► \$ 633, 995.				
a Applied to 2012, but not more than line 2a			0.	
b Applied to undistributed income of prior years		· · · · · ·		
(Election required — see instructions)		0.		
c Treated as distributions out of corpus				
(Election required – see instructions)	0.			
d Applied to 2013 distributable amount	622 001			74.
e Remaining amount distributed out of corpus	633,921.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the	0.			0.
same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	633,921.			
b Prior years' undistributed income Subtract	<u> </u>			
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency				
has been issued, or on which the section				
4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable		0.	ł	
amount — see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a Taxable amount — see instructions			0.	
THE Zu Taxable alloant See Hellastons			Ŭ.	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1. This amount must be				
distributed in 2014				0.
7 Amounts treated as distributions out of				<u> </u>
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)				
(see instructions)	633,995.			
8 Excess distributions carryover from 2008 not	_			
applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9.			<u> </u>	
a Excess from 2009				
b Excess from 2010]	1		
c Excess from 2011]			
d Excess from 2012 .]			
e Excess from 2013	<u></u>			F 000 PF (2012)

			٠.		
orm 990-PF (2013) THE JESS & SHEIL				86-0942313	Page 1
Part XIV Private Operating Foundat	ions (see instr	uctions and Par	t VII-A, question	1 9)	N/A
1 a If the foundation has received a ruling or dete is effective for 2013, enter the date of the	ruling	, .		_ ` •	
b Check box to indicate whether the foundat		erating foundation		4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years		
investment return from Part X for each year listed	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
b 85% of line 2a.					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a 'Assets' alternative test — enter					
(1) Value of all assets		ļ <u></u>	 		
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c 'Support' alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section					
512(a)(5)), or royalties) (2) Support from general public and 5 or					
more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization .					·
(4) Gross investment income		<u> </u>		<u> </u>	
art XV Supplementary Information assets at any time during th	(Complete this e year — see ir	s part only if the structions.)	e foundation had	d \$5,000 or more	in
Information Regarding Foundation Managers of the foundation who have close of any tax year (but only if they have NONE	e contributed more t	than 2% of the total of than \$5,000) (See	contributions received e section 507(d)(2))	by the foundation before	ore the
NONE					
b List any managers of the foundation who owr a partnership or other entity) of which the NONE	10% or more of the foundation has a	e stock of a corporat 10% or greater inte	ion (or an equally larg rest.	e portion of the owner	ship of
		 _	- <u></u>		
2 Information Regarding Contribution, Gran Check here ☐ if the foundation only ma requests for funds. If the foundation make	akes contributions to	preselected charital	ble organizations and		
complete items 2a, b, c, and d			one obouded he add.	and	
a The name, address, and telephone number o	r e-mail of the perso	on to wnom applicati	ons snould be address	sea	
SEE STATEMENT 6					
b The form in which applications should be	submitted and info	rmation and mater	ials they should incl	ude.	
SEE STATEMENT FOR LINE 2A					
c Any submission deadlines:					
SEE STATEMENT FOR LINE 2A					
d Any restrictions or limitations on awards,	such as by geogra	phical areas, charit	able fields, kinds of	institutions, or other	factors
SEE STATEMENT FOR LINE 2A			· · · · · · · · · · · · · · · · · · ·		
BAA	ī	EEA0310L 07/10/13		F	orm 990-PF (2013)

Page 11

. ******	SS-E				
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	Purpose of grant or contribution	Amount
	Name and address (home or business)	substantial contributor	recipient		
	Paid during the year				
SEE	STATEMENT 7				
				1	
	Total		L	<u> </u>	633, 995.
	Approved for future payment	1	1	1	033, 993.
	Approved for future payment		İ		
			ļ		
			1		
			1		
				1	
			1		
	Total		1	▶ 31	b
			•	•	i

Part XVI-A. Analysis of Income-Producing Activities

nter gross	amounts unless otherwise indicated.	Unrelate	d business income	Excluded by	section 512, 513, or 514	(a)
-	am service revenue	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (See instructions.)
a Progra	atii acivice ieveilue	-	· · · · · · · · · · · · · · · · · · ·	code		
ь				 		
c						·
d		1				
е						
f						
_	and contracts from government agencies				<u> </u>	
	pership dues and assessments					
	t on savings and temporary cash investments			 -		
•	ends and interest from securities			+		
	ental income or (loss) from real estate: financed property			+		
	ebt-financed property			1 -		
	ntal income or (loss) from personal property		<u>-</u>	+		
	r investment income	 		+		
-	r (loss) from sales of assets other than inventory		<u></u>	- -		<u> </u>
	ncome or (loss) from special events.					
	s profit or (loss) from sales of inventory		1.1-			
	revenue					
а						
b						
с				 		
d			·			
e		ļ				
	otal Add columns (b), (d), and (e)				13	0
	 Add line 12, columns (b), (d), and (e) sheet in line 13 instructions to verify calculati 	one)			13	
Part XVI	-B Relationship of Activities to the	e Accompi	ishment of Exem	pt Purpos	ses	
Line No. ▼	Explain below how each activity for which is accomplishment of the foundation's exempt	ncome is rep t purposes (o	orted in column (e) of ther than by providing	Part XVI-A funds for su	contributed importar uch purposes) (See	ntly to the instructions)
N/A						
						
			-			*
						•
						
					-	
···········						
-		·				
			-			
			-			
					<u></u>	
			-			
BAA		TEE	A0502L 07/11/13		27	Form 990-PF (201

Form 990-PF (2013) THE JESS & SHEILA SCHWARTZ 86-0942313 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

								1	
describe	organization directly d in section 501(c) d to political organizat	of the Code (otl	ngage in any of the follow her than section 501(c)(3	ving with a 3) organiza	ny other organizat tions) or in sectior	ion i 527,		Yes	No
a Transfers	s from the reporting	foundation to	a noncharitable exempt	organizatio	n of:			i	ļ
(1) Cash							1 a (1)		X
(2) Othe							1 a (2)		X
b Other tra								-	 -
		ala a suba la la la consecue					1 5 (1)		
` '	s of assets to a non-		· -				1 b (1)		<u>X</u>
			ble exempt organization		•		1 b (2)		<u>X</u>
(3) Rent	al of facilities, equip	oment, or other	r assets				1 b (3)		_X_
(4) Reim	nbursement arrangei	ments					1 b (4)		<u> X</u>
(5) Loan	ns or loan guarantee	:S					1 b (5)		X
(6) Perfe	ormance of services	or membershi	p or fundraising solicitati	ions		•	1 b (6)		X
c Sharing	of facilities, equipme	ent, mailing lis	ts, other assets, or paid	employees.			1 c		X
d If the and the goods any trans	swer to any of the a s, other assets, or ser saction or sharing ai	bove is 'Yes,' ovices given by trangement, sh	complete the following so the reporting foundation If now in column (d) the val	chedule. Co the foundat lue of the g	olumn (b) should a ion received less th joods, other assets	always show the fair an fair market value it s, or services receive	market val	ue of	
a) Line no	(b) Amount involved	(c) Name o	f noncharitable exempt organiza	ation	(d) Description of tr	ansfers, transactions, and	sharing arrar	ngement	.s
/A	· · · · · · · · · · · · · · · · · · ·	1	-						
-					·				
		 							
									
		 							
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			-						
		 				-5.000			
 						··········			
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							-		
					· · · · ·	····-			
		1							
describe b If 'Yes,'	ed in section 501(c) of complete the follow	of the Code (of ing schedule	d with, or related to, one or ther than section 501(c)(more tax-e 3)) or in se	xempt organization ction 527?	s	Yes	s X	No
(a)) Name of organizati	ion	(b) Type of orga	nızatıon		(c) Description of re	lationship		
I/A									
									
									-
							-		
Under p correct,	penalties of perjury, I declar and complete Declaration	re that I have exam	ined this return, including accom than taxpayer) is based on all int	panying schedi formation of wh	ules and statements, and nich preparer has any kn	d to the best of my knowled nowledge			
Sign Here	Sheda	Johnson	X61	वडाप	PRES/DIR		May the this retuing preparer (see inst	rn with the shown tructions	he helow
Signa	ature of officer or trustee		Date		Title			Yes	No
	Print/Type preparer's na	me	Preparer's signature		Date	Check If	PTIN		
Paid	FRANKLIN C.	FORSBERG	- Sulling	ofour	Gen 5-21-	self-employed	P0124	<u>70</u> 45	
reparer			SBERG & OLSON, F	rc	1	Firm's EIN - 86-	0130568		
•	_			E 220	U				
Jse Only	_		AZ 85012			Phone no (60	2) 277-	5447	,
RAA	<u> </u>	HOENIA, F	16 03012			Tribute to 100	Form 99		
MA							1 01111 33	U*FF (2	.010)

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 THE JESS & SHEILA	SCHWARTZ	Employer identification number
FAMILY FOUNDATION		86-0942313
Organization type (check one)		
Filers of:	Section:	
Form 990 or 990-EZ	501(c)() (enter number) organization	
	4947(a)(1) nonexempt charitable trust not treated as a	private foundation
	527 political organization	
Form 990-PF	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a priv	rate foundation
	501(c)(3) taxable private foundation	
Check if your organization is covered by the Ge	eneral Rule or a Special Rule	
Note. Only a section 501(c)(7), (8), or (10) orga	anization can check boxes for both the General Rule and a S	Special Rule. See instructions
General Rule X For an organization filing Form 990, 990-EZ, o contributor (Complete Parts I and II)	r 990-PF that received, during the year, \$5,000 or more (in mone	y or property) from any one
Special Rules		
\square 509(a)(1) and 170(b)(1)(A)(vi) and received	form 990 or 990-EZ that met the 33-1/3% support test of the I from any one contributor, during the year, a contribution of VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I a	t the greater of (1) \$5,000 or
For a section 501(c)(7), (8), or (10) organization total contributions of more than \$1,000 for the prevention of cruelty to children or anim	on filing Form 990 or 990-EZ that received from any one contribuuse <i>exclusively</i> for religious, charitable, scientific, literary, onals Complete Parts I, II, and III	tor, during the year, r educational purposes, or
For a section 501(c)(7), (8), or (10) organization	on filing Form 990 or 990-EZ that received from any one contribu	itor, during the year,
If this box is checked, enter here the total cont	charitable, etc. purposes, but these contributions did not total to tributions that were received during the year for an <i>exclusively</i> re	iligious, charitable, etc,
purpose Do not complete any of the parts unle	ess the General Rule applies to this organization because it rece	ived nonexclusively ► \$
religious, charitable, etc, contributions of \$		
990-PF) but it must answer 'No' on Part IV. Iin	y the General Rule and/or the Special Rules does not file So e 2, of its Form 990, or check the box on line H of its Form e filing requirements of Schedule B (Form 990, 990-EZ, or 9	990-EZ or on its Form 990-PF.
BAA For Paperwork Reduction Act Notice, se or 990-PF.	e the Instructions for Form 990, 990EZ, Schedule B	(Form 990, 990-EZ, or 990-PF) (2013)

	B (Form 990, 990-EZ, or 990-PF) (2013)	Page	1 of 1 of Part 1
Name of org	enization 'CESS & SHEILA SCHWARTZ	1	identification number
	Contributors (see instructions) Use duplicate copies of Part I if additional space	ıs needed	
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	SHEILA SCHWARTZ		Person X Payroll
	PHOENIX, AZ 85016	\$645,000.	Noncash (Complete Part II for noncash contributions)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash Complete Part II for
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	noncash contributions) (d) Type of contribution
		\$	Person Payroll Noncash Complete Part II for
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	noncash 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 Noncash Complete Part II for noncash contributions)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution

Person Payroll Noncash

(Complete Part II for noncash contributions)

Page

1 to

1 of Part II

Name of organization

Employer identification number

THE JESS & SHEILA SCHWARTZ 86-0942313

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
N/A			
	·	 \$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		 \$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		s 	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		 \$	
(a) No. from Part i	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<u> </u>		s	

Page

1 to

1 of Part III

Name of organization THE JESS & SHEILA SCHWARTZ

Employer identification number 86-0942313

Part III				501(c)(7), (8) or (10))
	 	 #4 000 (II	 		

organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter total of exclusively religious, charitable, etc, contributions of \$1,000 or less for the year (Enter this information once See instructions)

N/A

	Use duplicate copies of Part III if additional s	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		
	Transferee's name, address	(e) Transfer of gift	Relationship of transferor to transferee
	Transièree's name, address		
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
		(e) Transfer of gift	Relationship of transferor to transferee
	Transferee's name, address		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	Transferee's name, addres:	(e) Transfer of gift s. and ZIP + 4	Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
			·
	Transferee's name, addres	(e) Transfer of gift s, and ZIP + 4	Relationship of transferor to transferee
	<u> </u>		

2013	FEDERAL ST		PAGE 1	
CLIENT CS919	THE JESS & SHE FAMILY FOU		86-0942313	
5/21/14				08 42AM
STATEMENT 1 FORM 990-PF, PART I, LINE 16B ACCOUNTING FEES				
ACCOUNTING	(A) EXPENS PER BOO \$ 1, TOTAL \$ 1,	OKS INCOME 445.		(D) HARITABLE PURPOSES 0.
STATEMENT 2 FORM 990-PF, PART I, LINE 23 OTHER EXPENSES				
FILING FEES INSURANCE	EXPENS PER BO \$	DOKS INCOME 10. 550.	(C) ADJUSTED C: NET INCOME \$ 0. \$	(D) HARITABLE PURPOSES 0.
STATEMENT 3 FORM 990-PF, PART III, LINE 3 OTHER INCREASES				
2014 CONTRIBUTION-DEDUCT IN	2013		TOTAL \$	2,637. 2,637.
STATEMENT 4 FORM 990-PF, PART III, LINE 5 OTHER DECREASES				
2013 CONTRIBUTIONS-DEDUCT 2	012 .		TOTAL \$	1,642. 1,642.
STATEMENT 5 FORM 990-PF, PART VII-A, LINE 10 SUBSTANTIAL CONTRIBUTORS D		EAR		
NAME OF SUBSTANTIAL CONTRIB	JUTOR	ADDRESS OF SUBSTA	ANTIAL CONTRIBUTO	R
SHEILA SCHWARTZ		15 BILTMORE ESTAT PHOENIX, AZ 85016		

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2013

FEDERAL STATEMENTS

PAGE 2

CLIENT CS919

THE JESS & SHEILA SCHWARTZ **FAMILY FOUNDATION**

86-0942313

5/21/14

08 42AM

STATEMENT 6 FORM 990-PF, PART XV, LINE 2A-D APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:

NAME:

SHEILA SCHWARTZ

CARE OF: STREET ADDRESS: CITY, STATE, ZIP CODE:

15 BILTMORE ESTATES DRIVE

PHOENIX, AZ 85016

TELEPHONE:

E-MAIL ADDRESS:

FORM AND CONTENT:

NO PRESCRIBED FORM

SUBMISSION DEADLINES: RESTRICTIONS ON AWARDS: NONE NONE

STATEMENT 7 FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
ARIZONA JEWISH HISTORICAL SOCIETY 122 E CULBER STREET PHOENIX, AZ 85004		PC	TO PROVIDE FUNDING FOR PROMOTION OF A POSITIVE VISION OF JEWISH IDENTITY THROUGH HISTORY EDUCATION, ARTS AND CULTURE.	\$ 20,995.
			NOTE: \$20,000 DONATION MADE JANUARY 2013, OF WHICH \$1,642 WAS CONSIDERED A 2012 DONATION AND \$20,000 DONATION MADE JANUARY 2014, OF WHICH \$2,637 WAS CONSIDERED A 2013 DONATION.	
BARROW NEUROLOGICAL FOUNDATION 350 W THOMAS ROAD PHOENIX, AZ 85013		PC	TO PROVIDE FUNDING FOR RESEARCH.	5,000.
BUCKET LIST FOUNDATION 10810 N TATUM #102-108 PHOENIX, AZ 85028		PC	TO PROVIDE FUNDING FOR WISH GRANTING.	5,000.

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5/21/14

FEDERAL STATEMENTS

PAGE 3

CLIENT CS919

THE JESS & SHEILA SCHWARTZ FAMILY FOUNDATION

86-0942313

08 42AM

STATEMENT 7 (CONTINUED) FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
CHABAD OF MESA 941 S MAPLE MESA, AZ 85206		PC	TO PROVIDE FUNDING FOR PROMOTION OF JEWISH AWARNESS AND PRIDE.	\$ 10,000
CHRYSALIS 2055 W NORTHERN AVE PHOENIX, AZ 85021		PC	TO PROVIDED FUNDING TO HELP PEOPLE DEALING WITH ABUSE.	30,000.
COUNCIL FOR JES WITH SPECIAL NEEDS 12701 N SCOTTSDALE ROAD SCOTTSDALE, AZ 85254		PC	TO PROVIDE SERVICES FOR THOSE WITH SPECIAL NEEDS.	10,000
HILLEL JEWISH STUDENT CENTER 1012 S MILL AVENUE TEMPE, AZ 85281		PC	TO PROVIDE FUNDING FOR JEWISH UNDERGRADUATE AND GRADUATE STUDENTS.	3,000
JEWISH ARIZONANS ON CAMPUS 13039 N 70TH STREET SCOTTSDALE, AZ 85254		PC	TO PROVIDE FUNDING FOR STUDENTS TO EXPLORE THEIR JEWISH HERITAGE AND ALSO TO GET JEWISH PROGRAMS ON CAMPUS.	5,000
JEWISH COMMUNITY ASSOC OF GREATER PHX 12701 N SCOTTSDALE RD, SUITE 201 SCOTTSDALE, AZ 85254		PC	TO CONTINUE VARIOUS PROGRAMS LOCALLY, NATIONALLY, AND THROUGHOUT THE WORLD.	10,000
JEWISH COMMUNITY FOUNDATION 12701 N SCOTTSDALE RD, STE 202 SCOTTSDALE, AZ 85254		PC	TO PROVIDE FUNDING FOR PROGRAMS ENRICHING JEWISH LIFE AND STRENGTHENING THE COMMUNITY.	105,000
JEWISH NATIONAL FUND 42 E 69TH STREET NEW YORK, NY 10021		PC	TO PROVIDE FUNDING IN ISRAEL FOR THE LAND AND THE PEOPLE.	10,000

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5/21/14

FEDERAL STATEMENTS

PAGE 4

CLIENT CS919

THE JESS & SHEILA SCHWARTZ FAMILY FOUNDATION

86-0942313 08·42AM

STATEMENT 7 (CONTINUED) FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
KOBY MANDELL FOUNDATION 366 PEARSALL AVE, SUITE 1 CEDARHURST , NY 11516		PC	TO PROVIDE FUNDING FOR PROGRAMS THAT ENCOURAGE THOSE STRUCK BY TRAGEDY OF TERROR AND OTHER TRAUMA TO COPE WITH THEIR PAIN AND SORROW, AND TO HEAL.	\$ 5,000.
PEJE 88 BROAD STREET, 6TH FLOOR BOSTON, MA 02110		PC	TO PROVIDE FUNDING FOR EDUCATIONAL PROGRAMS.	300,000.
PHOENIX HEBREW ACADEMY 515 E BETHANY HOME ROAD PHOENIX, AZ 85012		PC	TO PROVIDE FUNDING FOR EDUCATION.	100,000.
VALLEY OF THE SUN JEWISH COMMUNITY CENTE 12701 N SCOTTSDALE RD, SUITE 203 SCOTTSDALE, AZ 85254		PC	TO PROVIDE FUNDING FOR SCHOLARSHIPS, SOCIAL, CULTURAL, AND EDUCATIONAL PROGRAMS.	10,000.
YESHIVA HIGH SCHOOL 727 E GLENDALE AVE PHOENIX, AZ 85020		PC	TO HELP FUND THE HIGH SCHOOL.	5,000.
			TOTAL	\$ 633,995.

(Rev January 2014)

Department of the Treasury

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

File a separate application for each return.

OMB No 1545-1709

Internal Revenue Service		►Information about Form 8868 a	ind its instri	uctions is at www.irs.gov/form8868.		
If you are filing for an Automatic 3-Month Extension, cor			plete only	Part I and check this box		► X
• If you are	e filing for an a	Additional (Not Automatic) 3-Month	n Extension	n, complete only Part II (on page 2 of the	s form).	
Do not comp	olete Part II un	less you have already been granted	d an autom	atic 3-month extention on a previously fi	led Form 8868	
Electronic fill corporation r request an ex Associated V	l ing (e-file). Yo equired to file tension of time Vith Certain Po	ou can electronically file Form 8868 Form 990-T), or an additional (not to file any of the forms listed in Part I	If you need automatic) or Part II w ust be sent	d a 3-month automatic extension of time 3-month extension of time. You can ele with the exception of Form 8870, Information to the IRS in paper format (see instruction	to file (6 months fo ctronically file Form Return for Transfers	1 8868 to
Part I	Automatic	3-Month Extension of Time.	Only sub	omit original (no copies needed).		
A corporation	n required to f	le Form 990-T and requesting an a	utomatic 6	-month extension — check this box and o	complete Part I only	, <u> </u>
All other corp income tax r		uding 1120-C filers), partnerships, i	REMICs, ai	nd trusts must use Form 7004 to request	an extension of tirr	
	Name of exempt	organization or other filer, see instructions		Enter mer s identifi	Employer identification in	
Type or print	THE JESS & SHEILA SCHWARTZ FAMILY FOUNDATION				86-0942313	
File by the		ind room or suite number. If a P.O. box, see in	structions		Social security number (SSN)
due date for filing your return See instructions	15 BILTM	BILTMORE ESTATES DRIVE				
	City, town or post office, state, and ZIP code. For a foreign address, see instructions					
	PHOENIX, AZ 85016-2821					
Application Is For	turn code for	the return that this application is for	Return Code	Application for each return) Application Is For		04 Return Code
Form 990 or Form 990-EZ			01	Form 990-T (corporation)		07
Form 990-BL			02	orm 1041-A		08
Form 4720 (individual)			03	Form 4720 (other than individual)		09
Form 990-PF			04	Form 5227		10
Form 990-T (section 401(a) or 408(a) trust)			05	Form 6069		11
Form 990-T (trust other than above)			06	Form 8870		12
Telephon If the org If this is check this the exter I request until The ex	ganization doe for a Group R is box sision is for st an automatic 8/15 tension is for calendar yea tax year beg	2) 274-7955s not have an office or place of buseturn, enter the organization's four If it is for part of the group, c 3-month (6 months for a corporation, 20 14, to file the exempt orgathe organization's return for	digit Group heck this b required to inization re , and endir	e United States, check this box Exemption Number (GEN) ox I and attach a list with the na file Form 990-T) extension of time turn for the organization named above.	this is for the whole mes and EINs of all	. , ,
Ch	ange in accou	nting period	"		Tar return	
3 a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions 3 a						0.

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

b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit

c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions

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