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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation RENE BLOCH FOUNDATION 97300920		A Employer identification number 91-6448421	
Number and street (or P O box number if mail is not delivered to street address) P O BOX 3168		B Telephone number (see instructions) (503) 464-3580	
City or town, state or province, country, and ZIP or foreign postal code PORTLAND, OR 97208		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input checked="" type="checkbox"/> \$ 1,044,250		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	20,276	20,276		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	21,601			
	b Gross sales price for all assets on line 6a 318,826				
	7 Capital gain net income (from Part IV , line 2)		21,601		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	41,877	41,877		
	13 Compensation of officers, directors, trustees, etc	16,682	15,014		1,668
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule)				0
	b Accounting fees (attach schedule)	1,500	0	0	1,500
	c Other professional fees (attach schedule)				0
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	2,996	560		0
	19 Depreciation (attach schedule) and depletion	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings		0	0	
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule)	144			144
	24 Total operating and administrative expenses. Add lines 13 through 23	21,322	15,574	0	3,312
	25 Contributions, gifts, grants paid	80,400			80,400
	26 Total expenses and disbursements. Add lines 24 and 25	101,722	15,574	0	83,712
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-59,845			
	b Net investment income (if negative, enter -0-)		26,303		
	c Adjusted net income (if negative, enter -0-)			0	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	926	610	610
	2	Savings and temporary cash investments	45,833	19,859	19,859
	3	Accounts receivable ▶ <u>563</u>			
		Less allowance for doubtful accounts ▶ _____	1,611	563	563
	4	Pledges receivable ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____			
		Less allowance for doubtful accounts ▶ <u>0</u>			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	693,515	595,505	724,026
	c	Investments—corporate bonds (attach schedule).	245,146	309,653	299,192
	11	Investments—land, buildings, and equipment basis ▶ _____			
	Less accumulated depreciation (attach schedule) ▶ _____				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)			0	
14	Land, buildings, and equipment basis ▶ _____				
	Less accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	987,031	926,190	1,044,250	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	987,031	926,190	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	987,031	926,190	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	987,031	926,190	

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	987,031
2	Enter amount from Part I, line 27a	2	-59,845
3	Other increases not included in line 2 (itemize) ▶ _____	3	4
4	Add lines 1, 2, and 3	4	927,190
5	Decreases not included in line 2 (itemize) ▶ _____	5	1,000
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	926,190

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	21,601
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

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

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	12,710	966,151	0 013155
2011	80,833	962,922	0 083946
2010	5,493	932,768	0 005889
2009	47,001	835,153	0 056278
2008	68,419	1,015,908	0 067348

2	Total of line 1, column (d).	2	0 226616
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 045323
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	1,008,288
5	Multiply line 4 by line 3.	5	45,699
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	263
7	Add lines 5 and 6.	7	45,962
8	Enter qualifying distributions from Part XII, line 4. If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	83,712

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	263
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c		All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0
3		Add lines 1 and 2.		3	263
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	263
6		Credits/Payments			
a		2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1,404	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c	0	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments. Add lines 6a through 6d.		7	1,404
8		Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.		8	0
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	1,141
11		Enter the amount of line 10 to be Credited to 2014 estimated tax 264 Refunded		11	877

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ (2) On foundation managers \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		No
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		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
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	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions): OR			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
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		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address				
14	The books are in care of USBANK Telephone no (503) 464-3580 Located at 555 SW OAK PORTLAND OR ZIP +4 97204			
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 instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (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, 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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
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 not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b		
	Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
US BANK	TRUSTEE	18,182		
PO BOX 3168	1			
PORTLAND, OR 97208				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3	

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	1,016,729
b	Average of monthly cash balances.	1b	6,914
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,023,643
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	1,023,643
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	15,355
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,008,288
6	Minimum investment return. Enter 5% of line 5.	6	50,414

Part XI

Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	50,414
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	263
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	263
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	50,151
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	50,151
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	50,151

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	83,712
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	83,712
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	263
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	83,449
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				50,151
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			13,688	
b Total for prior years 2011 , 20__ , 20__		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				0
b From 2009.				0
c From 2010.				0
d From 2011.				0
e From 2012.				0
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 83,712				
a Applied to 2012, but not more than line 2a			13,688	
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.				50,151
e Remaining amount distributed out of corpus	19,873			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	19,873			
b Prior years' undistributed income Subtract 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 amount—see instructions		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
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	19,873			
10 Analysis of line 9				
a Excess from 2009. . . .				0
b Excess from 2010. . . .				0
c Excess from 2011. . . .				0
d Excess from 2012. . . .				0
e Excess from 2013. . . .				19,873

Part XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

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

2

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

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a

The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

RENE BLOCH FOUNDATION CO US BANK
PO BOX 3168
PORTLAND,OR 97208
(503) 275-5929

b

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

OBTAIN FORM FROM US BANK

c

Any submission deadlines

SEPTEMBER 30TH

d

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

NO RESTRICTIONS

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

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)				
a Paid during the year See Additional Data Table				
Total			3a	80,400
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Form **990-PF** (2013)

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
214 747 ABERDEEN FDS EMRGN		2012-04-26	2013-02-05
2451 953 AMER CENT DIVERSIFI BOND INS		2012-04-26	2013-02-05
949 IPATH DOW JONES UBS COMMODITY		2012-04-26	2013-02-05
304 393 AMERICAN EUROPACIFIC GRTH F2		2012-04-26	2013-02-05
453 384 NUVEEN SANTA BARBARA DIV GROWTH FD I		2012-03-27	2013-02-05
72 723 NUVEEN HIGH INCOME BOND FD CL I		2012-04-26	2013-02-05
1022 144 NUVEEN REAL ESTATE SECS I		2004-03-10	2013-02-05
1620 345 NUVEEN INFLATION PRO SEC CL I		2012-04-26	2013-02-05
3224 867 P I M C O FDS TOTAL RETURN FD		2012-04-26	2013-02-05
352 568 P I M C O FDS TOTAL RETURN FD		2011-03-02	2013-02-05
333 317 T ROWE PRICE GROWTH STOCK #40		2011-02-01	2013-02-05
1904 2 T ROWE PRICE INTL BOND FUND		2012-04-26	2013-02-05
16 946 T ROWE PRICE SC STOCK		2011-02-01	2013-02-05
744 638 LAUDUS INTL MARKETMASTERS FUND SEL		2011-02-01	2013-02-05
405 155 SCOUT INTERNATIONAL FUND		2011-02-01	2013-02-05
267 726 VANGUARD EQUITY INCOME ADM		2012-03-27	2013-02-05
LAUDUS ROSEN INTL S C FD CL INV			2013-05-17
1762 176 ING GLOBAL BOND FUND I		2013-02-05	2013-09-10
679 494 CREDIT SUISSE COMM RET ST CO		2013-02-05	2013-11-08
1704 278 NUVEEN INFLATION PRO SEC CL I		2012-04-26	2013-11-08
171 265 T ROWE PRICE GROWTH STOCK #40		2011-02-01	2013-11-08
38 639 VANGUARD EQUITY INCOME ADM		2012-03-27	2013-11-08
CAPITAL GAIN DIVIDENDS	P		


Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
3,442		3,114	328
27,094		27,192	-98
40,105		39,532	573
12,988		11,914	1,074
12,853		12,201	652
671		638	33
22,497		18,525	3,972
19,234		19,007	227
36,086		36,151	-65
3,945		3,832	113
13,163		11,089	2,074
18,890		18,849	41
617		599	18
15,407		14,684	723
13,868		13,589	279
14,382		13,330	1,052
71			71
18,432		19,760	-1,328
4,824		5,606	-782
18,969		19,991	-1,022
8,404		5,698	2,706
2,410		1,924	486
			10,474


Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			328
			-98
			573
			1,074
			652
			33
			3,972
			227
			-65
			113
			2,074
			41
			18
			723
			279
			1,052
			71
			-1,328
			-782
			-1,022
			2,706
			486

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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)				
a Paid during the year				
SOLOMON SCHECHTER SCHOOL OF RARITAN VALLEY 511 RYDERS LANE EAST BRUNSWICK,NJ 08816	NONE	PRIVATE SCHOOL	GENERAL SUPPORT	2,000
ISRAELI-PALESTINIAN COOP FOR ECONOMIC EXPANSION 12 BARN HILL ROAD WOODBURY,CT 06798	NONE	PUBLIC	GENERAL SUPPORT	1,000
MEALS ON WHEELS 7710 SW 31ST AVENUE PORTLAND,OR 97219	NONE	PUBLIC	GENERAL SUPPORT	3,000
OREGON AREA JEWISH COMMITTEE 7410 SW OLESON ROAD PORTLAND,OR 97213	NONE	PUBLIC	GENERAL SUPPORT	1,000
RIDEABLE INC PO BOX 71092 SPRINGFIELD,OR 97475	NONE	PUBLIC	GENERAL SUPPORT	1,000
WASHINGTON SCHOLARSHIP FUND PO BOX 243 WASHINGTON DEPOT,CT 06794	NONE	PUBLIC	GENERAL SUPPORT	1,500
WOMEN OF THE WORLD FOUNDATION 555 WEST 18TH STREET NEW YORK,NY 10011	NONE	PUBLIC	GENERAL SUPPORT	1,500
AFTER SCHOOL ARTS PROGRAM PO BOX 15 WASHINGTON DEPOT,CT 06794	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	3,000
CASA FOR CHILDREN INC 1401 NE 68TH AVE PORTLAND,OR 97213	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	2,000
DOE FUND 232 EAST 84TH STREET NEW YORK,NY 10028	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	5,000
GREATER WASHINGTON COALITION FOR JEWISH LIFE PO BOX 1456 WASHINGTON,CT 06793	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	12,000
GREENWOODS COUNSELING REFERRALS PO BOX 1549 LITCHFIELD,CT 06759	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	2,000
GUNN MEMORIAL LIBRARY PO BOX 1273 WASHINGTON,CT 06793	NONE	PUBLIC	GENERAL SUPPORT	2,500
NATIONAL MULTIPLE SCLEROSIS SOCIETY - NEW YORK CHAPTER 733 THIRD AVE 3RD FL NEW YORK,NY 10017	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	4,000
NEW MILFORD HOSPITAL FOUNDATION 21 ELM STREET NEW MILFORD,CT 06776	NONE	PUBLIC	GENERAL SUPPORT	6,000
Total  3a				80,400

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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)				
a <i>Paid during the year</i>				
NW WRITING INSTITUTE LEWIS & CLARK COLLEGE 0615 SW PALANTINE HILL RD PORTLAND,OR 97219	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	6,000
PAST&E 7519 N BURLINGTON PORTLAND,OR 97203	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	4,000
SHARE 1501 BROADWAY STE 704A NEWYORK,NY 10036	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	3,500
STEEP ROCK ASSOCIATION PO BOX 279 WASHINGTON DEPOT,CT 06794	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	2,400
STERN CENTER FOR LANGUAGE & LEARNING 183 TALCOTT ROAD WILLISTON,VT 05495	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	3,500
STORE TO DOOR 7730 SW 31ST AVENUE PORTLAND,OR 97219	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	2,000
SUSAN B ANTHONY PROJECT 179 WATER STREET TORRINGTON,CT 06790	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	3,000
WASHINGTON CITIZENS SCHOLARSHIP FUND PO BOX 243 WASHINGTON DEPOT,CT 06794	NONE	PUBLIC	SCHOLARSHIP SUPPORT	1,500
WASHINGTON COMMUNITY FUND PO BOX 383 WASHINGTON DEPOT,CT 06794	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	4,000
YOUTH ORGANIZATION UMBRELLA 1027 SHERMAN AVENUE EVANSTON,IL 60202	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	2,000
ELDRIDGE PROJECT 12 ELDRIDGE STREET NEWYORK,NY 10002	NONE	PUBLIC	GENERAL FINANCIAL SUPPORT	1,000
Total  3a				80,400

TY 2013 Accounting Fees Schedule

Name: RENE BLOCH FOUNDATION 97300920

EIN: 91-6448421

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE (NON-ALLOC	1,500			1,500

**TY 2013 Investments Corporate
Bonds Schedule****Name:** RENE BLOCH FOUNDATION 97300920**EIN:** 91-6448421

Name of Bond	End of Year Book Value	End of Year Fair Market Value
AMER CENT DIVERSIFIED BOND INS	50,804	48,284
NUVEEN HIGH INCOME BOND FD	38,360	39,497
T ROWE PRICE INTL BOND FD	19,929	19,257
AMER CENT INTL BOND FND #392	20,230	19,660
COLUMBIA INCOME FD	50,574	48,007
CREDIT SUISSE COMM RET	24,739	21,680
DRIEHAUS SELECT CREDIT FND	35,760	36,236
PIMCO TOTAL RETURN FND #35	49,172	48,358
TCW EMERG MRKTS INCOME FD	20,085	18,213

**TY 2013 Investments Corporate
Stock Schedule****Name:** RENE BLOCH FOUNDATION 97300920**EIN:** 91-6448421

Name of Stock	End of Year Book Value	End of Year Fair Market Value
NUVEEN REAL ESTATE SECURITIES	13,219	18,041
T ROWE PRICE GROWTH STK FD	53,803	85,015
LAUDUS INTL MRKTMSTRS FD #1547	64,964	81,321
SCOUT INTERNATIONAL FUND	67,908	76,358
T ROWE PRICE SC STOCK	29,396	37,066
ABERDEEN FDS EMRGN MKT #5840	51,160	50,921
AMER EUROPACIFIC GRTH F2 #616	64,299	80,464
IPATH DOW JONES UBS COMM		
NUVEEN INFLATION PRO SEC		
NUVEEN SANTA BARBARA DIV GRWTH	66,608	82,431
T ROWE PRICE MID-CAP GROWTH FD	39,864	48,657
VANGUARD EQUITY INC ADM #565	63,364	79,701
BLACKROCK EMRGNG MRKTS FND	30,345	30,002
PRINCIPAL GL R E SEC FND #4905	20,230	19,652
ROBECO BOSTON PARTNERS LS RSRC	30,345	34,397

TY 2013 Other Decreases Schedule

Name: RENE BLOCH FOUNDATION 97300920

EIN: 91-6448421

Description	Amount
ADJ FOR 2014 REVERSAL OF 2013 DISBURSEMENT	1,000

TY 2013 Other Expenses Schedule

Name: RENE BLOCH FOUNDATION 97300920

EIN: 91-6448421

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE CHARITABLE FILING FEE	144	0		144

TY 2013 Other Increases Schedule

Name: RENE BLOCH FOUNDATION 97300920

EIN: 91-6448421

Description	Amount
ROUNDING ADJ	4

TY 2013 Taxes Schedule**Name:** RENE BLOCH FOUNDATION 97300920**EIN:** 91-6448421

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAX PAYMENT - PRIOR YE	1,032	0		0
FEDERAL ESTIMATES - PRINCIPAL	1,404	0		0
FOREIGN TAXES ON QUALIFIED FOR	541	541		0
FOREIGN TAXES ON NONQUALIFIED	19	19		0