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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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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 ANNE AND ELI SHAPIRA CHARITABLE FOUNDATION		A Employer identification number 93-1306729	
Number and street (or P O box number if mail is not delivered to street address) 7327 SW Barnes Road		B Telephone number (see instructions) (877) 586-9416	
City or town, state or province, country, and ZIP or foreign postal code Portland, OR 97225		C If exemption application is pending, check here ▶ ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ▶ ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶ \$ 2,192,855		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ 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 ▶ ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	29	29		
	4 Dividends and interest from securities.	50,851	50,077		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	66,806			
	b Gross sales price for all assets on line 6a 1,641,518				
	7 Capital gain net income (from Part IV, line 2)		66,806		
	8 Net short-term capital gain				
	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)	 3,014	3,014		
	12 Total. Add lines 1 through 11	120,700	119,926		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages	42,346			42,346
	15 Pension plans, employee benefits	10,058			10,058
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	 3,750			3,750
	c Other professional fees (attach schedule)	 6,281	6,270		
	17 Interest	92	15		
	18 Taxes (attach schedule) (see instructions)	 1,868	649		208
	19 Depreciation (attach schedule) and depletion	 67			
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule).	 11,827			11,827
	24 Total operating and administrative expenses. Add lines 13 through 23	76,289	6,934		68,189
	25 Contributions, gifts, grants paid	236,894			234,554
	26 Total expenses and disbursements. Add lines 24 and 25	313,183	6,934		302,743
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-192,483			
	b Net investment income (if negative, enter -0-)		112,992		
	c Adjusted net income (if negative, enter -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	74,364	56,310	56,310
	2	Savings and temporary cash investments	31,626	18,659	18,659
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	1,011		
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).	426,114	292,495	291,230
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,451,109	1,417,702	1,826,186
	14	Land, buildings, and equipment basis ▶ _____ 3,685 Less accumulated depreciation (attach schedule) ▶ 3,584			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,984,392	1,785,267	2,192,855	
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 ▶ _____)	7,990	1,348	
	23	Total liabilities (add lines 17 through 22)	7,990	1,348	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ 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 ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	1,976,402	1,783,919	
	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)	1,976,402	1,783,919	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,984,392	1,785,267	

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	1,976,402
2	Enter amount from Part I, line 27a	2	-192,483
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	1,783,919
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,783,919

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)
1 a	publicly traded securities	P	2010-01-01	2013-12-31
b	Capital Gain Dividends			
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 1,635,655		1,574,712	60,943
b			
c			5,863
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) 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			60,943
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	66,806
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	291,065	2,317,201	0 12561
2011	240,439	2,527,019	0 09515
2010	307,673	2,685,327	0 11458
2009	503,820	2,812,623	0 17913
2008	513,163	3,423,428	0 14990

2 Total of line 1, column (d).	2	0 66436
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 13287
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	2,204,413
5 Multiply line 4 by line 3.	5	292,905
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	1,130
7 Add lines 5 and 6.	7	294,035
8 Enter qualifying distributions from Part XII, line 4.	8	302,743

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

Part VI Excise 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 ☐ and enter "N/A" on line 1		1	1,130
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ 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	
3 Add lines 1 and 2.		3	1,130
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	1,130
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1,011	
b Exempt foreign organizations—tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d.		7	1,011
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		9	119
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	
11 Enter the amount of line 10 to be Credited to 2014 estimated tax Refunded		11	

Part VII-A Statements 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	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)?		1b	No
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.			
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?		2	No
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	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	No
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5	No
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	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 ▶ WWW SHAPIRA FOUNDATION ORG				
14	The books are in care of ▶ CATHY THOMPSON Telephone no ▶ (877) 586-9416 Located at ▶ 7327 SW BARNES ROAD 124 PORTLAND OR ZIP +4 ▶ 97225			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			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? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see 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?. ☐ Yes ☒ No 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?. ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>).	3b		No
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))?	☐ Yes	☒ No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes	☒ No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes	☒ No	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).	☐ Yes	☒ No	
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes	☒ No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b		No
	Organizations relying on a current notice regarding disaster assistance check here.			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?			
	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?			
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?			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		No

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
ANNE L SHAPIRA	Co-Trustee	0		
7327 SW BARNES ROAD 124 PORTLAND, OR 97225	2 00			
ELIJAHU SHAPIRA	Co-Trustee	0		
7327 SW BARNES ROAD 124 PORTLAND, OR 97225	2 00			
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.				

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.		

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	2,145,363
b	Average of monthly cash balances.	1b	91,540
c	Fair market value of all other assets (see instructions).	1c	1,080
d	Total (add lines 1a, b, and c).	1d	2,237,983
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	
3	Subtract line 2 from line 1d.	3	2,237,983
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	33,570
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,204,413
6	Minimum investment return. Enter 5% of line 5.	6	110,221

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	110,221
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	1,130
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,130
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	109,091
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	109,091
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	109,091

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	302,743
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	302,743
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	1,130
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	301,613
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				109,091
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.	346,304			
b From 2009.	363,715			
c From 2010.	175,537			
d From 2011.	114,956			
e From 2012.	176,247			
f Total of lines 3a through e.	1,176,759			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 302,743				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				109,091
e Remaining amount distributed out of corpus	193,652			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the 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	1,370,411			
b Prior years' undistributed income Subtract line 4b from line 2b.				
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.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
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).				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . .	346,304			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	1,024,107			
10 Analysis of line 9				
a Excess from 2009. . . .	363,715			
b Excess from 2010. . . .	175,537			
c Excess from 2011. . . .	114,956			
d Excess from 2012. . . .	176,247			
e Excess from 2013. . . .	193,652			

Part XIV Private 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)

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 XV **Supplementary 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))

ELIJAHU SHAPIRA

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

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

ROBERT THOMPSON
7327 SW BARNES ROAD 124
PORTLAND, OR 97225
(877) 586-9416
ROBBT@SHAPIRAFOUNDATION.ORG

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

SEND 1-2 PAGE LETTER DESCRIBING YOUR ORGANIZATION AND ITS EXPERIENCE IN THE FIELD, WHAT YOU PROPOSE TO DO, WHY THE PROJECT IS NEEDED, WHO WILL BE SERVED, IN WHAT GEOGRAPHIC AREAS, HOW PROJECT OR PROGRAM RELATES TO OUR AREAS OF EMPHASIS, AMOUNT OF GRANT REQUEST, HOW FUNDS WOULD BE USED, AND AMOUNT OF TOTAL PROJECT OR PROGRAM BUDGET. WE WILL EVALUATE, INFORM YOU WHETHER OR NOT YOUR PROJECT OR PROGRAM APPEARS TO MEET OUR GUIDELINES OR INTERESTS, AND MAY INVITE YOU TO SUBMIT A FULL GRANT APPLICATION. INFORMATION MAY BE OBTAINED AT WWW.SHAPIRAFOUNDATION.ORG

c Any submission deadlines

No deadline

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

Grants will not be made to individuals, athletic teams, events, debt reduction drives, political organizations, or for benefit tickets, religious purposes, or lobbying activities

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	236,894
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)

Part XVII

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

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

1

Cash.

1a(1)

No

2

Other assets.

1a(2)

No

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

1b(1)

No

2

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

3

Rental of facilities, equipment, or other assets.

1b(3)

No

4

Reimbursement arrangements.

1b(4)

No

5

Loans or loan guarantees.

1b(5)

No

6

Performance of services or membership or fundraising solicitations.

1b(6)

No

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

d

If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐

Yes

☒

No

b

If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

2014-05-15

Signature of officer or trustee

Date

Title

May the IRS discuss this return with the preparer shown below (see instr.)?

☒

Yes

☐

No

Paid Preparer Use Only

Print/Type preparer's name STAN HARDY CPA	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00011809
Firm's name ☐	HARDY & HOLMES LLC			Firm's EIN ☐
Firm's address ☐	1510 NE VILLAGE ST FAIRVIEW, OR 970243826			Phone no (503) 667-5355

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				
DALLAS COMMUNITY LIGHTHOUSE PO BOX 495787 GARLAND,TX 75049	N/A	PC	KIDS CAMPUS TUTORIALS SUMMER ENRICHMENT PROGRAMS ADMINISTRATIVE COSTS	20,000
SISTERS OF THE ROAD 133 NW SIXTH AVE PORTLAND,OR 97209	N/A	PC	HOT MEALS BARTER PROGRAM	5,000
CHILDREN'S CANCER ASSOCIATION 433 NW 4TH AVE SUITE 100 PORTLAND,OR 97209	N/A	PC	LIFE SUPPORT FAMILY ENRICHMENT PROGRAM - TO HELP FAMILIES WITH ESSENTIAL NEEDS AND OPPORTUNITIES, BENEFITTING CHILDREN WITH CANCER AND THEIR FAMILIES	20,000
OREGON COMMUNITY WAREHOUSE INC 3969 NE MARTIN LUTHER KING BLVD PORTLAND,OR 97212	N/A	PC	DELIVERY TRUCK PURCHASE PROGRAM	5,000
COMMUNITY TRANSITIONAL SCHOOL 6601 NE KILLINGSWORTH STREET PORTLAND,OR 97218	N/A	PC	BUS TRANSPORTATION PROGRAM FOR TRANSIENT STUDENTS	5,000
PORTLAND HOMELESS FAMILY SOLUTIONS 1838 SW JEFFERSON ST PORTLAND,OR 97201	N/A	PC	TO PURCHASE GIFTS, DECORATIONS, AND FOOD FOR HOLIDAY PARTY FOR GOOSE HOLLOW FAMILY SHELTER	3,000
MUDD-NICK FOUNDATION PO BOX 993 MANZANITA,OR 97130	N/A	PC	PROGRAMS TO SUPPORT DISADVANTAGED AND LOW- INCOME YOUTH IN TILLAMOOK COUNTY	10,000
NORTHWEST KIDNEY KIDS INC 300 N GRAHAM SUITE 300 PORTLAND,OR 97227	N/A	170B1AVI	SCHOLARSHIP PROGRAM FOR KIDNEY KIDS CAMP SERVING CHILDREN WITH CHRONIC KIDNEY DISEASE, ON DIALYSIS OR WITH KIDNEY TRANSPLANTS	5,000
SAINT ANDRE BESSETTE CATHOLIC CHURC 601 WEST BURNSIDE ST PORTLAND,OR 97209	N/A	PC	TO SUPPORT OPEN DOOR MINISTRIES MORNING HOSPITALITY PROGRAM AND FOOD PANTRY PRGRAM TO ASSIST THE POOR AND HOMELESS AT THE DOWNTOWN CHAPEL, AND RELATED CAPITAL PROJECTS	30,000
ROSE HAVEN HOMELESS SHELTER PO BOX 11620 PORTLAND,OR 97211	N/A	PC	ADVOCACY CASE MANAGER PROGRAM	5,000
GALES CREEK CAMP FOUNDATION 7110 SW FIR LOOP 170 PORTLAND,OR 97223	N/A	PC	CAMPERSHIPS FOR CHILDREN WITH TYPE I DIABETES	6,000
SUNSHINE PANTRY 10895 SW 5TH ST BEAVERTON,OR 97008	N/A	PC	RELOCATION AND CAPACITY IMPROVEMENT PROJECT AND STORAGE RACKS	25,000
JOIN A Center for Involvement 1435 NE 181st Suite 100 Portland,OR 97213	N/A	PC	OPEN DOOR CAMPAIGN TO ASSIST HOMELESS FAMILIES IN FINDING PERMANENT HOUSING	5,000
DOUGY CENTER INC 3903 SE 52ND AVE PORTLAND,OR 97206	N/A	PC	YOUTH GRIEF COUNSELING PROGRAM	3,000
MT HOOD KIWANIS CAMP INC 10725 SW BARBUR BLVD SUITE 50 PORTLAND,OR 97219	N/A	PC	CAMPERSHIPS FOR DISADVANTAGED LOW- INCOME CHILDREN	5,000
Total  3a				236,894

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>				
CATLIN GABEL SCHOOL 8825 SW BARNES ROAD PORTLAND, OR 97225	N/A	PC	CREATIVE ART SCHOOL CONSTRUCTION PROJECT	50,000
TRANSITION PROJECTS INC 665 NW HOYT STREET PORTLAND, OR 97209	N/A	PC	HOLIDAY MEALS AT THE CLARK CENTER AND JEAN'S PLACE HOMELESS SHELTERS	5,074
TRANSITION PROJECTS INC 665 NW HOYT STREET PORTLAND, OR 97209	N/A	PC	FOOD PANTRY PROGRAM AT JEAN'S PLACE HOMELESS SHELTER	5,000
MAKE-A-WISH FOUNDATION OF OREGON IN 2000 SW 1ST AVE SUITE 410 PORTLAND, OR 97201	N/A	PC	WISHING ON A WORKOUT DAY AT BEAVERTON CROSSFIT TO FUND WISHES OF CHILDREN WITH LIFE-THREATENING MEDICAL CONDITIONS	3,000
BRADLEY ANGLE HOUSE FOR WOMEN AND C 5432 N ALBINA AVE PORTLAND, OR 97217	N/A	PC	ASSIST IN PURCHASING PASSENGER VAN FOR SHELTER FOR SURVIVORS OF DOMESTIC VIOLENCE	5,000
CATLIN GABEL SCHOOL 8825 SW BARNES ROAD PORTLAND, OR 97225	N/A	PC	SCHOLARSHIP PROGRAM AT CREATIVE ART SCHOOL	4,500
CALIFORNIA HWY PATROL 11-99 FOUNDAT 2244 NORTH STATE COLLEGE BOULEVARD FULLERTON, CA 92831	N/A	PC	TO SUPPORT FAMILIES OF HIGHWAY PATROL OFFICERS	10,000
MUDD-NICK FOUNDATION PO BOX 1078 MANZANITA, OR 97130	N/A	PC	CATERING FOR CHARITY EVENT	2,320
Total  3a				236,894

TY 2013 Accounting Fees Schedule

Name: ANNE AND ELI SHAPIRA CHARITABLE
FOUNDATION

EIN: 93-1306729

Software ID: 13000170

Software Version: 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PREPARATION OF 990- PF & CT-12	3,750	0	0	3,750

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2013 Depreciation Schedule

Name: ANNE AND ELI SHAPIRA CHARITABLE
FOUNDATION
EIN: 93-1306729

Software ID: 13000170

Software Version: 2013v3.1

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Pnnter	2011-07-20	350	182	53	19 20 %	67			

**TY 2013 Investments Corporate
Bonds Schedule**

Name: ANNE AND ELI SHAPIRA CHARITABLE
FOUNDATION

EIN: 93-1306729

Software ID: 13000170

Software Version: 2013v3.1

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CONOCOPHILLIPS 4.75% 2/1/2014	27,019	27,092
ORACLE CORP 3.75% 7/8/2014	100,637	101,726
CATERPILLAR FINL SVCS CORP SR NT 4.625%	26,281	26,407
GENERAL ELECTRIC CAP CORP MED TERM 4.375	26,146	26,497
ANHEUSER BUSCH COS INC NT 4.5% 4/1/18	27,625	27,545
WALMART STORES INC NOTES 4.125% 2/1/19	27,749	27,117
MICROSOFT CORP NT 4.2% 6/1/19	28,344	27,556
DU PONT E I DE NEMOURS & CO FIXED 4.625%	28,694	27,290
BERKSHIRE HATHAWAY FIN CORP GTD 4.25%		

TY 2013 Investments - Other Schedule

Name: ANNE AND ELI SHAPIRA CHARITABLE
FOUNDATION

EIN: 93-1306729

Software ID: 13000170

Software Version: 2013v3.1

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ISHARES RUSSELL 1000 VALUE	AT COST	119,816	208,681
ISHARES S&P 500 GROWTH INDX	AT COST	96,543	209,646
HUSSMAN STRATEGIC GROWTH FUND #601	AT COST		
ISHARES S & P MIDCAP 400 VALUE	AT COST	14,204	37,542
ISHARES S & P SMALLCAP 600 GROWTH	AT COST	12,166	37,599
GATEWAY FUND Y	AT COST	38,536	45,591
ISHARES S & P MIDCAP 400 GROWTH	AT COST	11,388	37,698
ISHARES S & P SMALL CAP 600 VALUE	AT COST	14,609	37,495
POWERSHARES EXCH TR FD WATER RESOURCES	AT COST	15,640	31,385
ISHARES TR MICROCAP ETF FUND	AT COST	14,602	35,231
ISHARES TR MSCI EMERGING MARKETS INDEX F	AT COST		
ISHARES MSCI BRIC INDEX FUND	AT COST		
ISHARES S&P LATIN AMERICA 40	AT COST		
MERGER FUND	AT COST		
ISHARES TR COHEN & STEERS REALTY	AT COST		
ISHARES INC MSCI PACIFIC EX-JAPAN INDEX	AT COST		
DOUBLELINE TOTAL RETURN BOND FUND	AT COST		
DRIEHAUS ACTIVE INCOME FUND	AT COST		
GOLDMAN SACHS HIGH YIELD MUNICIPAL FUND	AT COST		
LOOMIS SAYLES BOND FUND INSTL	AT COST	32,270	32,803
CLAYMORE EXCHANGE TRADED FD TR 2	AT COST		
GLOBAL X FDS GLOBAL X FTSE ASEAN 40 ETF	AT COST		
TR S&P EMERGING MKTS	AT COST		
JP MORGAN CHASE & CO ALERIAN MLP INDEX	AT COST	49,911	61,831
WISDOM TREE TR EMERGING MKTS EQUITY	AT COST		
PIMCO EMERGING LOCAL BOND FUND	AT COST		
ABERDEEN GLOBAL HI INC FUND CL I JHYIX	AT COST	35,817	37,021
JOHCM INTL SELECT FD CL I JOHIX	AT COST	99,590	119,723
THE OAKMARK INTERNATIONAL FUND CLASS I	AT COST	97,256	110,983
PIMCO TOTAL RETURN FUND INST CLASS	AT COST		

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
PIMCO ALL ASSET FUND INST CLASS	AT COST		
WELLS FARGO ADVTG ULTRA SHORT TERM MUNI	AT COST		
ISHARES TR FTSE CHINA 25 INDEX FD	AT COST		
SWEDISH EXPT CR CORP ELEMENTS INTL COMMO	AT COST		
VANGUARD SCOTTSDALE FDS SH TERM	AT COST		
ABERDEEN EMERGING MARKETS FUND	AT COST	114,569	116,971
FPA CRESCENT PORTFOLIO	AT COST	57,050	63,522
REMS REAL ESTATE VALUE OPPORTUNITY	AT COST	45,545	44,073
LORD ABBETT SHORT DURATION INCOME FUND	AT COST	91,109	91,288
MAINSTAY MARKETFIELD FUND	AT COST	59,640	61,637
MATTHEWS ASIA DIVIDEND INST FUND	AT COST	54,507	55,570
OSTERWEIS STRATEGIC INCOME FUND	AT COST	30,025	30,153
RIDGEWORTH SEIX FLOATING RATE HIGH INC F	AT COST	89,634	89,839
TEMPLETON GLOBAL BOND FUND ADVISOR CL	AT COST	21,205	20,949
WELLS FARGO ADVANTAGE ABSOLUTE RETURN	AT COST	131,225	133,911
CLAYMORE EXCH TRADED FD GUGGENHEIM TIMB	AT COST	25,490	30,562
VANGUARD INDEX FDS REIT ETF	AT COST	45,355	44,482

TY 2013 Land, Etc. Schedule

Name: ANNE AND ELI SHAPIRA CHARITABLE
FOUNDATION

EIN: 93-1306729

Software ID: 13000170

Software Version: 2013v3.1

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Computers and printer	3,685	3,584	101	470

TY 2013 Other Expenses Schedule

Name: ANNE AND ELI SHAPIRA CHARITABLE
FOUNDATION

EIN: 93-1306729

Software ID: 13000170

Software Version: 2013v3.1

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bookkeeping/Program Director	8,407			8,407
Insurance	1,425			1,425
Membership Fees	1,125			1,125
Postage & Box Rental	372			372
Supplies	498			498

TY 2013 Other Income Schedule

Name: ANNE AND ELI SHAPIRA CHARITABLE
FOUNDATION

EIN: 93-1306729

Software ID: 13000170

Software Version: 2013v3.1

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Investment Income	3,014	3,014	

TY 2013 Other Liabilities Schedule

Name: ANNE AND ELI SHAPIRA CHARITABLE
FOUNDATION

EIN: 93-1306729

Software ID: 13000170

Software Version: 2013v3.1

Description	Beginning of Year - Book Value	End of Year - Book Value
Withheld payroll taxes payable	7,990	1,348

TY 2013 Other Professional Fees Schedule

Name: ANNE AND ELI SHAPIRA CHARITABLE
FOUNDATION

EIN: 93-1306729

Software ID: 13000170

Software Version: 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	6,281	6,270	0	0

TY 2013 Taxes Schedule

Name: ANNE AND ELI SHAPIRA CHARITABLE
FOUNDATION

EIN: 93-1306729

Software ID: 13000170

Software Version: 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX ON INVESTMENT INCOME	1,011			
FOREIGN TAXES PAID ON DIVIDENDS	649	649		
OR DEPT OF JUSTICE CT-12 FEES	208			208