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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 ROBERT F FORD CHARITABLE FOUNDATION		A Employer identification number 95-6016768	
Number and street (or P O box number if mail is not delivered to street address) 172 TOYON ROAD		B Telephone number (see instructions) (650) 996-5370	
City or town, state or province, country, and ZIP or foreign postal code ATHERTON, CA 94027		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return</div> <div><input type="checkbox"/> Initial return of a former public charity</div> <div><input type="checkbox"/> Final return</div> <div><input type="checkbox"/> Amended return</div> <div><input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Name change</div>		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 type="checkbox"/> \$ 1,143,247		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 checked="" 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	11	11	11	
	4 Dividends and interest from securities.	13,126	13,126	13,126	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-1,645			
	b Gross sales price for all assets on line 6a 435,429				
	7 Capital gain net income (from Part IV, line 2) . . .				
	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)	 290	290	290	
	12 Total. Add lines 1 through 11	11,782	13,427	13,427	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	 2,000	2,000	2,000	
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	 11,878	11,878	11,878	
	24 Total operating and administrative expenses. Add lines 13 through 23	13,878	13,878	13,878	0
	25 Contributions, gifts, grants paid	44,000			44,000
	26 Total expenses and disbursements. Add lines 24 and 25	57,878	13,878	13,878	44,000
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-46,096			
	b Net investment income (if negative, enter -0-)		0		
	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	982	2,049	2,049
	2	Savings and temporary cash investments	85,648	5,858	5,858
	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			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	699,957	732,684	1,135,340
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	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)	786,587	740,591	1,143,247
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons		100	
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		100	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	786,587	740,491	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	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)	786,587	740,491	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	786,587	740,591	

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	786,587
2	Enter amount from Part I, line 27a	2	-46,096
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	740,491
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	740,491

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				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
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				
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	-1,645
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	-18,873

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	32,750	902,295	0 03630	
2011	24,500	915,054	0 02677	
2010	20,000	829,728	0 02410	
2009	77,000	797,460	0 09656	
2008	43,920	1,027,464	0 04275	
2	Total of line 1, column (d).		2	0 22648
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 04530
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.		4	1,023,085
5	Multiply line 4 by line 3.		5	46,341
6	Enter 1% of net investment income (1% of Part I, line 27b).		6	
7	Add lines 5 and 6.		7	46,341
8	Enter qualifying distributions from Part XII, line 4.		8	44,000
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 <input type="checkbox"/> and enter "N/A" on line 1		
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 <input type="checkbox"/> and enter 1% of Part I, line 27b	1	0
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	
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	
6 Credits/Payments		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	
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	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11 Enter the amount of line 10 to be Credited to 2014 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	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	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)? <i>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.</i>	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 <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T.</i>	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? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions): <input type="checkbox"/> CA _____			
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? <i>If "No," attach explanation.</i>	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)? <i>If "Yes," complete Part XIV</i>	9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	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 ▶N/A				
14	The books are in care of ▶FREEMAN A FORD Telephone no ▶(650) 306-1400 Located at ▶172 TOYON ROAD ATHERTON CA ZIP +4 ▶94027			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	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?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<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))?	<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		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
FREEMAN A FORD	Trustee	0		
172 TOYON ROAD	0 00			
ATHERTON, CA 94027				
JUDITH NEWMAN	DIRECTOR	0		
HIGHWAY 128	0 00			
CALISTOGA, CA 94515				
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	991,397
b	Average of monthly cash balances.	1b	47,268
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,038,665
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	1,038,665
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	15,580
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,023,085
6	Minimum investment return. Enter 5% of line 5.	6	51,154

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	51,154
2a	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).	2b	
c	Add lines 2a and 2b.	2c	
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	51,154
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	51,154
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	51,154

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	44,000
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	44,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	44,000
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				51,154
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			43,901	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 44,000				
a Applied to 2012, but not more than line 2a			43,901	
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.				99
e Remaining amount distributed out of corpus				
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				
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				51,055
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). . .				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				
d Excess from 2012. . . .				
e Excess from 2013. . . .				

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)				
<div>a</div> <div>Paid during the year</div> <div>See Additional Data TableSee Additional Data Table</div>				
<div>Total</div>			<div>▶ 3a</div>	44,000
<div>b</div> <div>Approved for future payment</div>				
<div>Total</div>			<div>▶ 3b</div>	

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?

Yes

No

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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

2014-08-04

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
JOHN R HOUGHTON
CPA

Preparer's Signature

Date

Check if self-employed ☐

PTIN
P01328531

Firm's name ☐

Ledwith Houghton & Co CPAs

Firm's EIN ☐


Firm's address ☐

643 Bair Island Rd 105 Redwood City, CA 94063


Phone no (650) 306-1400

Form 990-PF (2013)

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>				
Napa Valley Museum 59 Presidents Circle Yountville,CA 94599	NONE	501(C)(3)	To support the ongoing activities of the organization	7,700
White Barn Foundation 2601 Sulphur Springs Road St Helena,CA 94574	NONE	501(C)(3)	To support the ongoing activities of the organization	7,700
Hospice of Napa Valley 3299 Claremont Way Napa,CA 94558	NONE	501(C)(3)	To support the ongoing activities of the organization	3,300
Menlo Park-Atherton Ed Fd PO Box 554 Menlo Park,CA 94025	NONE	501(C)(3)	To support the ongoing activities of the organization	440
Thacher School Alumni Fund 5025 Thacher Road Ojai,CA 93023	NONE	501(C)(3)	To support the ongoing activities of the organization	2,640
Dartmouth College Alumni Fund 6068 Blunt Alumni Center Hanover,NH 03755	NONE	501(C)(3)	To support the ongoing activities of the organization	3,960
Hazelden Foundation PO Box 11 CO 3 Center City,MN 55012	NONE	501(C)(3)	To support the ongoing activities of the organization	1,320
Fellowship ClubHazelden PO Box 11 CO 3 Center City,MN 55012	NONE	501(C)(3)	To support the ongoing activities of the organization	1,320
Santa Catalina School 1500 Mark Thomas Dr Monterey,CA 93940	NONE	501(C)(3)	To support the ongoing activities of the organization	440
Family Service Agency 707 Bradford St Redwood City,CA 94063	NONE	501(C)(3)	To support the ongoing activities of the organization	660
KQED 2601 Mariposa Ave San Francisco,CA 94110	NONE	501(C)(3)	To support the ongoing activities of the organization	440
Regazzi Boys Chorus 20 N San Mateo Drive San Mateo,CA 94401	NONE	501(C)(3)	To support the ongoing activities of the organization	440
Ecumenical Hunger Program 1934 University Ave East Palo Alto,CA 94303	NONE	501(C)(3)	To support the ongoing activities of the organization	880
Outward Bound 100 Mystery Point Road Garrison,NY 10524	NONE	501(C)(3)	To support the ongoing activities of the organization	440
St Helena Hospital 650 Sanitarium Road Deer Park,CA 94576	NONE	501(C)(3)	To support the ongoing activities of the organization	3,300
Total  3a				44,000

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>				
Juvenile Diabetes Research Foundati 26 Broadway 14th Floor New York, NY 10004	NONE	501(C)(3)	To support the ongoing activities of the organization	2,640
AFRICA BRIDGE PO BOX 115 MARLYHURST, OR 97036	NONE	501(C)(3)	To support the ongoing activities of the organization	1,000
EASTSIDE COLLEGE PREPATORY SCHOOL 1041 Myrtle St East Palo Alto, CA 94303	NONE	501(C)(3)	To support the ongoing activities of the organization	1,640
MENLO SCHOOL 50 Valparaiso Ave ATHERTON, CA 94027	NONE	501(C)(3)	To support the ongoing activities of the organization	440
PLANNED PARENTHOOD 434 WEST 33RD ST NEW YORK, NY 10001	NONE	501(C)(3)	To support the ongoing activities of the organization	660
THAYER SCHOOL OF ENGINEERING 14 Engineering Drive HANOVER, NH 03755	NONE	501(C)(3)	To support the ongoing activities of the organization	2,640
Total  3a				44,000

TY 2013 Accounting Fees Schedule**Name:** ROBERT F FORD CHARITABLE FOUNDATION**EIN:** 95-6016768**Software ID:** 13000170**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION	2,000	2,000	2,000	0

TY 2013 Other Expenses Schedule**Name:** ROBERT F FORD CHARITABLE FOUNDATION**EIN:** 95-6016768**Software ID:** 13000170**Software Version:** 2013v3.1

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT EXPENSES- FEES	10,218	10,218	10,218	
TAXES	1,660	1,660	1,660	

TY 2013 Other Income Schedule

Name: ROBERT F FORD CHARITABLE FOUNDATION

EIN: 95-6016768

Software ID: 13000170

Software Version: 2013v3.1

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME	290		

2013 Tax Information Statement

Payer's Name and Address:
FIDUCIARY TRUST COMPANY INTL
600 5TH AVENUE
NEW YORK, NY 10020

Account Number: 491206100
Recipient's Tax ID Number: 95-6016768
Payer's Federal ID Number: 13-6122956
Payer's State ID Number: CA
State: (650)312-2068
Questions? ☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
THE ROBERT F. FORD CHARITABLE
172 TOYON ROAD
ATHERTON, CA 94027

2013 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No 1545-0715

Reported to the IRS is Sales Price of stocks, bonds etc., less commissions and option premiums.
Covered (Box 6a is not checked)

Cusip		Description (Box 8)		Stock or Other Symbol (Box 1d)						
Quantity Sold (Box 1e)	Date of Sale or Exchange (Box 1a)	Date of Acquisition (Box 1b)	Stocks, Bonds, etc. (Box 2a)	Cost or Other Basis (Box 3)	Wash Sale Loss Disallowed (Box 5)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)		
Short Term Sales Reported on 1099-B										
713448108	PEPSICO INC									
20 0000	01/31/2013	06/22/2012	PEP	1,376.96	0.00	87.06	0.00	0.00		
353496847	FRANKLIN INCOME FUND - ADVISOR CL									
2643.1720	02/05/2013	11/14/2012	FRIAX	6,000.00	0.00	343.61	0.00	0.00		
353496847	FRANKLIN INCOME FUND - ADVISOR CL									
6607.9300	02/14/2013	11/14/2012	FRIAX	15,000.00	0.00	859.03	0.00	0.00		
778296103	ROSS STORES INC									
270.0000	05/07/2013	Various	ROST	14,140.97	0.00	2,377.59	0.00	0.00		
881624209	TEVA PHARMACEUTICAL INDS LTD									
70 0000	05/07/2013	05/25/2012	TEVA	15,406.66	0.00	-5.92	0.00	0.00		
353496847	FRANKLIN INCOME FUND - ADVISOR CL									
14113 3840	05/09/2013	11/14/2012	FRIAX	2,703.02	0.00	2,963.81	0.00	0.00		
67020Y100	NUANCE COMMUNICATIONS INC									
1155.0000	05/24/2013	Various	NUAN	30,202.64	0.00	-3,697.05	0.00	0.00		
315616102	F5 NETWORKS INC									
135.0000	07/10/2013	Various	FFIV	25,766.28	0.00	-1,636.80	0.00	0.00		

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2013 Tax Information Statement

Payer's Name and Address:
FIDUCIARY TRUST COMPANY INTL
600 5TH AVENUE
NEW YORK, NY 10020

Account Number: 491206100
Recipient's Tax ID Number: 95-6016768
Payer's Federal ID Number: 13-6122956
Payer's State ID Number: CA
State: (650)312-2068

Recipient's Name and Address:
THE ROBERT F. FORD CHARITABLE
172 TOYON ROAD
ATHERTON, CA 94027

Questions? ☐ Corrected ☐ 2nd TIN notice

Reported to the IRS is Sales Price of stocks, bonds etc., less commissions and option premiums
Covered (Box 6a is not checked)

Cusip	Description (Box 8)	Stock or Other Symbol (Box 1d)	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis (Box 3)	Wash Sale Loss Disallowed (Box 5)	Net Gain or Loss (Box 4)	Federal Income Tax Withheld (Box 15)	State Tax Withheld (Box 15)
Quantity Sold (Box 1e)	Date of Sale or Exchange (Box 1a)	Date of Acquisition (Box 1b)	ISRG	11,544.87	0.00	-3,117.80	0.00	0.00
46120E602	INTUITIVE SURGICAL INC							
20.0000	07/10/2013	01/24/2013	8,427.07					
169656105	CHIPOTLE MEXICAN GRILL CLA		CMG	8,600.97	0.00	1,549.49	0.00	0.00
25.0000	07/26/2013	09/19/2012	10,150.46					
169656105	CHIPOTLE MEXICAN GRILL CLA		CMG	6,784.80	0.00	1,344.39	0.00	0.00
20.0000	08/07/2013	Various	8,129.19					
481165108	JOY GLOBAL INC		JOYG	9,003.10	0.00	-2,032.26	0.00	0.00
140.0000	09/04/2013	Various	6,970.84					
Y0920U103	BOC HONG KONG HOLDINGS LTD (HKD)		2388	17,278.32	0.00	-1,004.57	0.00	0.00
5010.0000	09/05/2013	Various	16,273.75					
88018X102	TEMPLETON CHINA WORLD FD INC CO		TACWX	28,036.86	0.00	36.86	0.00	0.00
737.2300	09/24/2013	04/26/2013		28,000.00				
97717W315	WISDOMTREE EMERGING MARKETS EQ INC ETF		DEM	16,385.51	0.00	248.53	0.00	0.00
315.0000	09/24/2013	11/14/2012	16,634.04					
881624209	TEVA PHARMACEUTICAL INDS LTD		TEVA	4,425.78	0.00	55.64	0.00	0.00
120.0000	10/31/2013	12/28/2012	4,481.42					
Total Short Term Sales Reported on 1099-B			206,992.13	208,520.51	0.00	-1,628.39	0.00	0.00

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2013 Tax Information Statement

Payer's Name and Address:
FIDUCIARY TRUST COMPANY INTL
600 5TH AVENUE
NEW YORK, NY 10020

Account Number: 491206100
Recipient's Tax ID Number: 95-6016768
Payer's Federal ID Number: 13-6122956
Payer's State ID Number:

State: CA
Questions? (650)312-2068

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
THE ROBERT F. FORD CHARITABLE
172 TOYON ROAD
ATHERTON, CA 94027

Reported to the IRS is Sales Price of stocks, bonds etc., less commissions and option premiums
Covered (Box 6a is not checked)

Cusip	Description (Box 8)	Stock or Other Symbol (Box 1d)	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis (Box 3)	Wash Sale Loss Disallowed (Box 5)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
30231G102	EXXON MOBIL CORP	XOM	8,679.25	8,111.36	0.00	567.89	0.00	0.00
30231G102	EXXON MOBIL CORP	XOM	26,370.79	25,614.81	0.00	755.98	0.00	0.00
582839106	MEAD JOHNSON NUTRITION COMPANY	MJN	2,324.53	2,175.60	0.00	148.93	0.00	0.00
881624209	TEVA PHARMACEUTICAL INDS LTD	TEVA	10,595.75	13,402.50	0.00	-2,806.75	0.00	0.00
315616102	F5 NETWORKS INC	FFIV	6,831.17	7,887.65	0.00	-1,056.49	0.00	0.00
25179M103	DEVON ENERGY CORP NEW	DVN	3,375.35	4,418.29	0.00	-1,042.94	0.00	0.00
481165108	JOY GLOBAL INC	JOYG	9,709.39	15,626.05	0.00	-5,916.66	0.00	0.00
195.0000								

Report on Form 8949, Part I, with Box A checked

Long Term Sales Reported on 1099-B
30231G102 EXXON MOBIL CORP

2013 Tax Information Statement

Page 10 of 29
Ref: 760
Recipient's Name and Address:
THE ROBERT F. FORD CHARITABLE
172 TOYON ROAD
ATHERTON, CA 94027

Account Number: 491206100
Recipient's Tax ID Number: 95-6016768
Payer's Federal ID Number: 13-6122956
Payer's State ID Number: CA
State: (650)312-2068
Questions? ☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address:
FIDUCIARY TRUST COMPANY INTL
600 5TH AVENUE
NEW YORK, NY 10020

Reported to the IRS is Sales Price of stocks, bonds etc., less commissions and option premiums.
Covered (Box 6a is not checked)

Cusip	Description (Box 8)	Stock or Other Symbol (Box 1d)	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis (Box 3)	Wash Sale Loss Disallowed (Box 5)	Net Gain or Loss (Box 4)	Federal Income Tax Withheld (Box 15)	State Tax Withheld (Box 15)
(Box 1e) G4402L151	(Box 1a) HENGAN INTERNATIONAL GROUP CO LTD	(Box 1b) Various	(Box 2a) 1044	(Box 3) 18,341.49	(Box 5) 0.00	(Box 4) 3,827.76	(Box 15) 0.00	(Box 15) 0.00
1670.0000	09/05/2013	Various	18,341.49	14,513.73	0.00	3,827.76	0.00	0.00
83088M102	SKYWORKS SOLUTIONS INC	SWKS	6,452.01	7,553.15	0.00	-1,101.14	0.00	0.00
250.0000	09/24/2013	01/20/2011	6,452.01	7,553.15	0.00	-1,101.14	0.00	0.00
637071101	NATIONAL-OILWELL INC	NOV	10,848.13	9,801.05	0.00	1,047.08	0.00	0.00
140.0000	09/30/2013	05/07/2012	10,848.13	9,801.05	0.00	1,047.08	0.00	0.00
83088M102	SKYWORKS SOLUTIONS INC	SWKS	18,856.38	20,123.37	0.00	-1,266.99	0.00	0.00
750.0000	10/16/2013	Various	18,856.38	20,123.37	0.00	-1,266.99	0.00	0.00
881624209	TEVA PHARMACEUTICAL INDS LTD	TEVA	12,884.08	13,140.74	0.00	-256.66	0.00	0.00
345.0000	10/31/2013	06/22/2012	12,884.08	13,140.74	0.00	-256.66	0.00	0.00
169656105	CHIPOTLE MEXICAN GRILL CL A	CMG	5,373.35	3,376.41	0.00	1,996.94	0.00	0.00
10.0000	11/13/2013	09/14/2012	5,373.35	3,376.41	0.00	1,996.94	0.00	0.00
Total Long Term Sales Reported on 1099-B			140,641.67	145,744.71	0.00	-5,103.05	0.00	0.00

Report on Form 8949, Part II, with Box D checked

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. The taxpayer is ultimately responsible for the accuracy of their own tax return.

2013 Tax Information Statement

Recipient's Name and Address:

THE ROBERT F FORD CHARITABLE
172 TOYON ROAD
ATHERTON, CA 94027

Account Number:

491206100
95-6016768
13-6122956

Recipient's Tax ID Number:

Payer's Federal ID Number:

Payer's State ID Number:

State:

Questions?

☐ Corrected

CA

(650)312-2068

☐ 2nd TIN notice

Payer's Name and Address:

FIDUCIARY TRUST COMPANY INTL
600 5TH AVENUE
NEW YORK, NY 10020

2013 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is Sales Price of stocks, bonds, etc., less commissions and option premiums.

For noncovered securities (Box 6a is checked) shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the IRS.

Cusip	Description (Box 8)		Stock or Other Symbol (Box 1d)					Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)	
	Date of Sale or Exchange (Box 1e)	Date of Acquisition	Stocks Bonds, etc (Box 2a)	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss				
Long Term Sales Reported on 1099-B										
151020104	CELGENE CORP		CELG							
35.0000	01/31/2013	12/27/2007	3,443.66	1,655.39	0.00	1,788.27	0.00		0.00	
375558103	GILEAD SCIENCES INC		GILD							
155.0000	03/20/2013	Various	6,921.63	1,342.08	0.00	5,579.55	0.00		0.00	
151020104	CELGENE CORP		CELG							
50.0000	04/11/2013	12/27/2007	6,143.33	2,364.84	0.00	3,778.49	0.00		0.00	
375558103	GILEAD SCIENCES INC		GILD							
150.0000	04/11/2013	06/17/2004	7,740.91	1,213.42	0.00	6,527.49	0.00		0.00	
582839106	MEAD JOHNSON NUTRITION COMPANY		MJN							
90.0000	04/11/2013	Various	6,973.57	5,247.67	0.00	1,725.90	0.00		0.00	
464287184	ISHARES CHINA LARGE-CAP ETF		FXI							
600.0000	04/25/2013	Various	22,212.23	19,669.25	0.00	2,542.96	0.00		0.00	
881624209	TEVA PHARMACEUTICAL INDS LTD		TEVA							
55.0000	05/07/2013	Various	2,119.15	2,645.30	0.00	-526.15	0.00		0.00	

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. For noncovered securities shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the Internal Revenue Service. The taxpayer is ultimately responsible for the accuracy of their own tax return.

2013 Tax Information Statement

Recipient's Name and Address:
THE ROBERT F. FORD CHARITABLE
172 TOYON ROAD
ATHERTON, CA 94027

Account Number: 491206100
Recipient's Tax ID Number: 95-6016768
Payer's Federal ID Number: 13-6122956
Payer's State ID Number: CA
State: (650)312-2068
Questions? ☐ 2nd TIN notice

Payer's Name and Address:
FIDUCIARY TRUST COMPANY INTL
600 5TH AVENUE
NEW YORK, NY 10020

☐ Corrected

For noncovered securities (Box 6a is checked) shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the IRS.

Cusip	Description (Box 8)	Stock or Other Symbol (Box 1d)	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
(Box 1e) 881624209	(Box 1a) TEVA PHARMACEUTICAL INDS LTD	TEVA	7,702.35	7,276.00	0.00	426.35	0.00	0.00
200 0000	05/08/2013 03/16/2007	TEVA	1,541.01	1,455.20	0.00	85.81	0.00	0.00
881624209	TEVA PHARMACEUTICAL INDS LTD	NUAN	4,681.36	3,802.11	0.00	879.25	0.00	0.00
40 0000	05/08/2013 03/16/2007	NUAN	5,625.58	7,323.76	0.00	-1,698.18	0.00	0.00
67020Y100	DEVON ENERGY CORP NEW	DVN	12,689.86	11,468.74	0.00	1,221.12	0.00	0.00
245.0000	05/24/2013 Various	NUAN	87,794.64	65,463.76	0.00	22,330.86	0.00	0.00
25179M103	DEVON ENERGY CORP NEW							
100.0000	08/07/2013 Various							
67020Y100	NUANCE COMMUNICATIONS INC							
800 0000	11/14/2013 Various							
Total Long Term Sales Reported on 1099-B								

Report on Form 8949, Part II, with Box E checked

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. For noncovered securities shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the Internal Revenue Service. The taxpayer is ultimately responsible for the accuracy of their own tax return.