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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 03-01-2013 , and ending 02-28-2014

Name of foundation FRED J AND SHIRLEY H JORDAN FOUNDATION		A Employer identification number 27-2151492	
Number and street (or P O box number if mail is not delivered to street address) 20 STANWIX STREET SUITE 650		B Telephone number (see instructions) (412) 261-0779	
City or town, state or province, country, and ZIP or foreign postal code PITTSBURGH, PA 15222		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"/> \$ 19,238,349		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 checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	404,974	379,781		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	560,741			
	b Gross sales price for all assets on line 6a 6,475,427				
	7 Capital gain net income (from Part IV, line 2) . . .		560,741		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	152,272	152,272		
	12 Total. Add lines 1 through 11	1,117,987	1,092,794		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	186,895	186,895		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest	59	59		0
	18 Taxes (attach schedule) (see instructions)	6,416	6,416		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	7,390	7,165		0
	24 Total operating and administrative expenses. Add lines 13 through 23	200,760	200,535		0
	25 Contributions, gifts, grants paid	900,000			900,000
	26 Total expenses and disbursements. Add lines 24 and 25	1,100,760	200,535		900,000
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	17,227			
	b Net investment income (if negative, enter -0-)		892,259		
	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	42,203	992,052	992,052
	2	Savings and temporary cash investments			
	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)	1,998,773	 200,766	206,107
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).	3,209,290	 1,559,742	1,634,459
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	12,721,522	 14,900,455	16,405,731
	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)	17,971,788	17,653,015	19,238,349	
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 ▶ _____)	 336,000	 0	
	23	Total liabilities (add lines 17 through 22)	336,000	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	17,635,788	17,653,015	
	30	Total net assets or fund balances (see page 17 of the instructions)	17,635,788	17,653,015	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	17,971,788	17,653,015	

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	17,635,788
2	Enter amount from Part I, line 27a	2	17,227
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	17,653,015
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	17,653,015

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	560,741
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	666,081	17,958,391	0 037090
2011	311,382	13,565,562	0 022954
2010	0	6,658,725	0 000000
2009			
2008			

2	Total of line 1, column (d).	2	0 060044
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 020015
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	18,766,570
5	Multiply line 4 by line 3.	5	375,613
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	8,923
7	Add lines 5 and 6.	7	384,536
8	Enter qualifying distributions from Part XII, line 4.	8	900,000

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		1	8,923
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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3 Add lines 1 and 2.		3	8,923
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	8,923
6 Credits/Payments			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	6,000
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	6,000
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	2,923
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 \$ 0 (2) On foundation managers \$ 0			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		2	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	
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)			
PA			
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 N/A				
14	The books are in care of THE FOUNDATION Telephone no (412) 261-0779 Located at 20 STANWIX STREET SUITE 650 PITTSBURGH PA ZIP+4 15222			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b		
	Organizations relying on a current notice regarding disaster assistance check here.			
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		

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
SMITHFIELD TRUST COMPANY	CO-TRUSTEE	152,096	0	0
20 STANWIX STREET SUITE 630 PITTSBURGH, PA 15222	10 00			
MRS KAYE R DEWEY	CO-TRUSTEE	26,799	0	0
215 PARK ROAD CARNEGIE, PA 15106	5 00			
MR FRANK W JONES	COMMITTEE MEMBER	4,000	0	0
787 PINE VALLEY DRIVE PITTSBURGH, PA 15239	5 00			
MS TERRI S WOLFE	COMMITTEE MEMBER	4,000	0	0
514 JACKSONIA STREET PITTSBURGH, PA 15212	5 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.				0

Part VIII

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

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

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	0

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	18,472,649
b	Average of monthly cash balances.	1b	579,706
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	19,052,355
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	19,052,355
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	285,785
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	18,766,570
6	Minimum investment return. Enter 5% of line 5.	6	938,329

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	938,329
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	8,923
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	8,923
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	929,406
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	929,406
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	929,406

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	900,000
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
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	900,000
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	8,923
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	891,077
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				929,406
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			890,509	
b Total for prior years 20____, 20____, 20____		0		
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.	0			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 900,000				
a Applied to 2012, but not more than line 2a			890,509	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				9,491
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions.		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions.			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014.				919,915
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a.	0			
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 XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

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

1

Information Regarding Foundation Managers:

a

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

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 of the person to whom applications should be addressed

b

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

c

Any submission deadlines

d

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

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	900,000
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
12 UNITS STC SMALL CAP CORE EQUITY PRIVATE FUND	P	2012-12-19	2013-12-16
190 SHS 1-3 YEAR INVESTMENT GRADE CORPORATE BONDS	P	2012-09-05	2013-07-19
12 UNITS STC MID CAP EQUITY PRIVATE FUND	P	2013-02-19	2013-12-16
111 UNITS STC TACTICAL LARGE CAP PRIVATE FUND	P	2013-02-19	2013-05-10
100000 SHS ASSOCIATES CORP OF N A 11/1/18	P	2011-05-25	2013-08-12
48 UNITS STC SMALL CAP CORE EQUITY PRIVATE FUND	P	2011-07-15	2014-01-15
12 UNITS STC SMALL CAP CORE EQUITY PRIVATE FUND	P	2012-01-13	2014-01-15
8 UNITS STC SMALL CAP CORE EQUITY PRIVATE FUND	P	2012-12-19	2014-01-15
20 UNITS STC TACTICAL ALLOCATION PRIVATE FUND	P	2012-01-13	2013-08-14
16 UNITS STC TACTICAL ALLOCATION PRIVATE FUND	P	2011-01-12	2013-12-16
100000 SHS CITIGROUP INC 5/5/14	P	2010-03-11	2013-08-12
100000 SHS CITIGROUP INC 1/15/15	P	2011-09-20	2013-08-12
100000 SHS DELL INC 6/15/19	P	2011-12-09	2013-07-11
100000 SHS FEDERAL HOME LOAN MTGE 2/24/16	P	2012-05-22	2014-02-24
100000 FEDERAL NATL MTG ASSN 9/17/13	P	2010-09-17	2013-09-17
100000 SHS HEWLETT PACKARD 3/1/13	P	2011-08-31	2013-03-01
4555 SHS 1-3 YEAR INVESTMENT GRADE CORPORATE BONDS	P	2012-02-01	2013-07-19
25 UNITS STC TACTICAL LARGE CAP PRIVATE FUND	P	2012-01-25	2014-01-15
35 UNITS STC TACTICAL LARGE CAP PRIVATE FUND	P	2012-01-25	2014-02-18
165000 SHS METLIFE INC 11/24/13	P	2011-01-26	2013-11-24
100000 SHS MORGAN STANLEY 1/26/20	P	2011-05-25	2013-08-12
20000 SHS NEVADA HSG DIV SINGLE FAM 10/1/39	P	2009-11-05	2013-04-01
30000 SHS OHIO ST HSG FIN AGY 9/1/39	P	2009-10-16	2013-03-01
10000 SHS OHIO ST HSG FIN AGY 9/1/39	P	2009-10-16	2013-09-03
100000 SHS ORIX CORPORATION 1/12/16	P	2011-04-28	2013-08-12
100000 US TREASURY NOTE 2/15/18	P	2011-06-09	2014-02-26
100000 US TREASURY NOTE 10/31/14	P	2011-06-09	2014-02-26
100000 US TREASURY NOTE 11/15/19	P	2011-07-25	2014-02-26
150000 US TREASURY NOTE 11/30/16	P	2011-06-10	2014-02-26
100000 US TREASURY NOTE 5/15/13	P	2011-06-10	2013-05-15

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
100000 US TREASURY NOTE 5/31/15	P	2011-06-09	2014-02-26
150000 US TREASURY NOTE 7/31/17	P	2011-06-09	2014-02-26
150000 US TREASURY NOTE 8/15/20	P	2012-01-10	2014-02-26
150000 US TREASURY NOTE 11/15/21	P	2012-01-10	2014-02-26
150000 US TREASURY NOTE 2/15/22	P	2012-08-14	2014-02-26
100000 SHS VERIZON WIRELESS 2/1/14	P	2011-08-22	2013-11-29
20000 SHS WASHINGTON STATE HSG 6/1/40	P	2009-10-09	2013-06-03
100000 SHS AFLAC INC 2/15/22	P	2012-02-08	2014-02-28
100000 SHS HERSHEY COMPANY 12/1/20	P	2012-09-06	2014-02-28
100000 SHS BERKSHIRE HATHAWAY FIN 5/15/22	P	2012-05-15	2014-02-28
100000 SHS MANULIFE FINANCIAL CORP 9/17/20	P	2010-09-23	2014-02-28
25000 SHS PINE-RICHLAND PA SCH DIST 2/26/14	P	2005-10-18	2014-02-28
100000 SHS VIRGIN VALLEY WATER NV 3/1/21	P	2008-04-30	2014-02-28
20000 SHS NEW HAMPSHIRE 7/1/27	P	2009-12-17	2014-02-28
15000 SHS CARLISLE PA AREA SCH DIST 3/1/22	P	2005-08-23	2014-02-28
25000 SHS FLORIDA HSG FIN 7/1/28	P	2009-12-10	2014-02-28
100000 SHS PA STATE HIGHER EDL 6/15/19	P	2004-06-17	2014-02-28
25000 NEVADA SHS HSG DIV SINGLE FAM 10/1/39	P	2009-11-05	2014-02-28
35000 SHS OHIO ST HSG FIN AGY 9/1/39	P	2009-10-16	2014-02-28
50000 SHS WASHINGTON STATE HSG 2/28/14	P	2009-10-09	2014-02-28
20000 SHS NEW MEXICO MTG FIN AUTH 9/1/40	P	2009-11-05	2014-02-28
COMMON TRUST FUND GAINS	P	2014-02-28	2014-02-28
MCVEAN TRADING ACCOUNT	P	2014-02-28	2014-02-28
PARTNERSHIP INVESTMENT PASSTHROUGH GAINS	P	2014-02-28	2014-02-28
CAPITAL GAINS DIVIDENDS	P		

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
149,504		116,862	32,642
19,942		20,008	-66
82,255		61,165	21,090
672,128		613,604	58,524
118,535		112,093	6,442
607,841		474,734	133,107
151,960		118,683	33,277
101,307		79,122	22,185
114,932		101,989	12,943
96,655		81,592	15,063
102,870		101,455	1,415
106,553		103,321	3,232
100,605		113,197	-12,592
100,000		99,989	11
100,000		100,000	0
100,000		100,000	0
478,079		477,344	735
174,368		139,379	34,989
235,674		195,945	39,729
165,000		165,000	0
110,643		102,424	8,219
20,000		20,584	-584
30,000		31,487	-1,487
10,000		10,490	-490
106,615		101,665	4,950
109,142		105,067	4,075
101,455		100,984	471
108,959		104,014	4,945
158,697		154,928	3,769
100,000		100,000	0

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
102,389		101,610	779
157,362		153,055	4,307
155,833		158,362	-2,529
146,803		150,241	-3,438
146,154		154,124	-7,970
100,809		100,653	156
20,000		20,595	-595
105,227		100,000	5,227
110,407		111,259	-852
99,213		99,691	-478
109,765		99,973	9,792
26,012		25,074	938
107,003		99,608	7,395
20,609		20,837	-228
15,245		15,159	86
26,484		26,364	120
100,949		100,000	949
25,065		25,709	-644
35,593		36,687	-1,094
49,867		51,455	-1,588
20,487		21,281	-794
146,076			146,076
		35,824	-35,824
6,077			6,077
8,279			8,279

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			32,642
			-66
			21,090
			58,524
			6,442
			133,107
			33,277
			22,185
			12,943
			15,063
			1,415
			3,232
			-12,592
			11
			0
			0
			735
			34,989
			39,729
			0
			8,219
			-584
			-1,487
			-490
			4,950
			4,075
			471
			4,945
			3,769
			0

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			779
			4,307
			-2,529
			-3,438
			-7,970
			156
			-595
			5,227
			-852
			-478
			9,792
			938
			7,395
			-228
			86
			120
			949
			-644
			-1,094
			-1,588
			-794
			146,076
			-35,824
			6,077
			8,279

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				
ANIMAL RESCUE LEAGUE OF WESTERN PA 6620 HAMILTON AVE PITTSBURGH,PA 15206	NONE	501 (C) (3)	GENERAL	75,000
AUDUBON SOCIETY OF WESTERN PA 614 DORSEYVILLE ROAD PITTSBURGH,PA 15238	NONE	501 (C) (3)	GENERAL	75,000
BIG BROTHERS AND SISTERS OF GREATER PITTSBURGH 5989 PENN CIRCLE SOUTH PITTSBURGH,PA 15206	NONE	501 (C) (3)	GENERAL	75,000
BLIND AND VISION REHABILITATION SERVICES OF PITTSBURGH 1800 WEST STREET HOMESTEAD,PA 15120	NONE	501 (C) (3)	GENERAL	75,000
GUIDE DOG FOUNDATION FOR THE BLIND 371 E JERICHO TURNPIKE SMITHTOWN,NY 11787	NONE	501 (C) (3)	GENERAL	75,000
INTERNATIONAL FUND FOR ANIMAL WELFARE 1350 CONNECTICUT AVENUE NW WASHINGTON,DC 20036	NONE	501 (C) (3)	GENERAL	75,000
NATIONAL WILDLIFE FEDERATION 11100 WILDLIFE CENTER DR RESTON,VA 20190	NONE	501 (C) (3)	GENERAL	75,000
PENNSYLVANIA WILDLIFE FEDERATION 2426 N AND ST HARRISBURG,PA 17110	NONE	501 (C) (3)	GENERAL	75,000
SALVATION ARMY OF PITTSBURGH 700 NORTH BELL AVE CARNEGIE,PA 15106	NONE	501 (C) (3)	GENERAL	75,000
THE HUMANE SOCIETY OF THE UNITED STATES 2100 L ST NW WASHINGTON,DC 20037	NONE	501 (C) (3)	GENERAL	75,000
WESTERN PA SCHOOL FOR BLIND CHILDREN 201 NORTH BELLEFIELD AVE PITTSBURGH,PA 15213	NONE	501 (C) (3)	GENERAL	75,000
WESTERN PA SCHOOL FOR THE DEAF 300 EAST SWISSVALE AVENUE PITTSBURGH,PA 15218	NONE	501 (C) (3)	GENERAL	75,000
Total ▶ 3a				900,000

**TY 2013 Investments Corporate
Bonds Schedule**

Name: FRED J AND SHIRLEY H JORDAN FOUNDATION
EIN: 27-2151492

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	1,559,742	1,634,459

TY 2013 Investments Government Obligations Schedule

Name: FRED J AND SHIRLEY H JORDAN FOUNDATION

EIN: 27-2151492

US Government Securities - End of Year Book Value:	100,445
US Government Securities - End of Year Fair Market Value:	99,795
State & Local Government Securities - End of Year Book Value:	100,321
State & Local Government Securities - End of Year Fair Market Value:	106,312

TY 2013 Investments - Other Schedule**Name:** FRED J AND SHIRLEY H JORDAN FOUNDATION**EIN:** 27-2151492

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MCVEAN TRADING ACCOUNT	AT COST	842,282	842,282
PARTNERSHIP INVESTMENTS	AT COST	1,310,823	1,389,503
COMMON TRUST FUNDS	AT COST	7,436,005	8,823,205
EXCHANGE TRADED FUNDS (ETF)	AT COST	5,311,345	5,350,741

TY 2013 Other Expenses Schedule

Name: FRED J AND SHIRLEY H JORDAN FOUNDATION

EIN: 27-2151492

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT EXPENSES	7,165	7,165		0
NONDEDUCTIBLE EXPENSE	225	0		0

TY 2013 Other Income Schedule

Name: FRED J AND SHIRLEY H JORDAN FOUNDATION

EIN: 27-2151492

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP INCOME	151,322	151,322	151,322
ROYALTIES	950	950	950

TY 2013 Other Liabilities Schedule

Name: FRED J AND SHIRLEY H JORDAN FOUNDATION

EIN: 27-2151492

Description	Beginning of Year - Book Value	End of Year - Book Value
DISTRIBUTIONS PAYABLE	336,000	0

TY 2013 Taxes Schedule**Name:** FRED J AND SHIRLEY H JORDAN FOUNDATION**EIN:** 27-2151492

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	3,933	3,933		0
FEDERAL EXCISE TAX	2,483	2,483		0