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Form 990-PF

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

OMB No. 1545-0052

2013

Do not enter Social Security numbers on this form as it may be made public.
Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

For calendar year 2013, or tax year beginning 4/01, 2013, and ending 3/31, 2014

BURTON C AND ANNE C GREENBLATT
FOUNDATION INC
111 COOLIDGE STREET
3 PLAINFIELD, NJ 07080

G Check all that apply:
☐ Initial return
☐ Final return
☐ Address change
☐ Initial return of a former public charity
☐ Amended return
☐ Name change

H Check type of organization:
☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust
☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16)
\$ 3,850,579
J Accounting method:
☒ Cash
☐ Accrual
☐ Other (specify)

A Employer identification number
52-1638050
B Telephone number (from the instructions)
908-753-2000
C If exemption application is pending, check here ☐
D 1 Foreign organizations, check here ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ☐
E If private foundation status was terminated under section 507(c)(1)(A), check here ☐
F If the foundation is in a 60-month termination under section 507(c)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, and reserves (attach schedule)	1,987,149.			
2 CA ☐ If the foundation is not required to file Schedule C				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	112,716.	112,716.	112,716.	
5a Gross rents				
b Net rental income or loss (attach schedule)				
6a Net gain (loss) from sale of assets other than line 10	7,212.			
b Gross sales or other income (attach schedule)	385,781.			
7 Capital gain net income (from Part II, line 2)		7,212.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross salary, wages, and other income				
b Loss, cost of goods sold				
c Gross profit (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	2,107,077.	119,928.	112,716.	
13 Compensation of officers, directors, trustees, etc.	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				
18 Taxation (attach schedule)	1,761.			1,761.
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conference fees, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)				
24 Total operating and administrative expenses. Add lines 13 through 23	1,761.			1,761.
25 Contributions, grants, and other income (Part IV)	196,371.			196,371.
26 Total expenses and disbursements. Add lines 24 and 25	198,132.	0.	0.	198,132.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	1,908,945.			
b Net investment income (if negative, enter 0)		119,928.		
c Adjusted net income (if negative, enter 0)			112,716.	

BAA For Paperwork Reduction Act Notice, see instructions.

12E/05/ML 10/09/13

Form 990-PF (2013)

MAR 25 2015

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Part II Balance Sheets		Beginning of year (a) Book Value	End of year	
			(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash — non-interest-bearing	109,222.	270,695.	270,697.
	2 Savings and temporary cash investments	67,821.	1,432,470.	1,432,470.
	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 sch)			
	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)	973,766.	542,085.	428,436.
	c Investments — corporate bonds (attach schedule)	846,631.	1,661,185.	1,718,976.
	11 Investments — land, buildings, and equipment (attach sch)			
LIABILITIES	Less: accumulated depreciation (attach schedule)			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule)			
	14 Land, buildings, and equipment (attach sch)			
	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)	1,997,440.	3,906,435.	3,850,579.
	17 Accounts payable and accrued expenses		50.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other — disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	0.	50.	
NET ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☒ and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	1,997,440.	3,906,385.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	1,997,440.	3,906,385.	
	31 Total liabilities and net assets/fund balances (see instructions)	1,997,440.	3,906,435.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,997,440.
2	Enter amount from Part I, line 27a.	2	1,906,945.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3.	4	3,906,385.
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	3,906,385.

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 shares MLC Company)	(b) How acquired P = Purchase D = Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a 1430 Citigroup Capital X 6.1%	P	1/04/08	10/01/13
b 2000 Citigroup Capital XVI 6.45%	P	4/30/12	7/15/13
c 7418 Guggenheim Enh Equity Strat Fd	P	3/30/11	9/10/13
d 6450 Eaton Vance Risk Mgd Div Equity Inc	P	3/14/07	9/10/13
e 10150 Eaton Vance Tax Mgd Div Equity Inc	P	5/26/11	9/10/13

(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 35,750		28,095.	7,655.
b 50,000.		50,005.	-5.
c 128,120.		123,200.	4,920.
d 69,657.		82,691	-13,034.
e 103,254.		95,578.	7,676.

(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gain (Column (h) gain minus column (k), but not less than 0) or Losses (from column (h))
a			7,655.
b			-5.
c			4,920.
d			-13,034.
e			7,676.

2 Capital gain net income or (net capital loss)	2	7,212.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	3	0.

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(a)(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 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 (column (b) divided by column (c))
2012	194,402	1,754,938.	0.110774
2011	185,348.	1,540,890.	0.120286
2010	184,661	1,575,346.	0.117219
2009	121,651	1,435,515	0.084744
2008	111,690	1,334,515.	0.083693

2 Total of line 1, column (d)	2	0.516716
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	0.103343
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	2,185,858.
5 Multiply line 4 by line 3	5	225,893.
6 Enter 1% of net investment income (1% of Part I, line 27c)	6	1,199.
7 Add lines 5 and 6	7	227,092.
8 Enter qualifying distributions from Part XII, line 4	8	198,132.

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 instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter NA on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary — see instrs)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b _____		1	2,399.
c All other domestic foundations enter 2% of line 17b. Exempt foreign organizations enter 4% of Part I, line 12, column (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	2,399.
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	2,399.
6 Credits/Payments:			
a 2013 estimated tax paid and 2012 overpayment credited to 2013	6a	1,324.	
b Exempt foreign organizations — tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	1,324.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached.	8	7.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed.	9	1,082.	
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

	Yes	No
1 a 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		X
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?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation: \$ 0. (2) On foundation managers: \$ 0.		
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?		X
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.		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		X
If "Yes," attach the statement required by General Instruction T.		
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part IV, column (c), and Part XIV.	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions): NJ		
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 C? If "No," attach explanation.	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(i)(3) or 4942(i)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV.		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		X

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		X
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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address: N/A	13	X	
14	The books are in care of: ANNE GREENBLATT Telephone no: 908-753-2000 Located at: 111 COOLIDGE STREET S. FLAINFIELD NJ ZIP + 4: 07080			
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: N/A	15		N/A
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 9022.1. If "Yes," enter the name of the foreign country: N/A	16	Yes	No
				X

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
1 a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception: Check "No" if the foundation agreed to make a grant to or to employ the official for a period prior to termination of government service terminating within 90 days) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(a)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here: ☐	1 b	N/A
c Did the foundation engage in a prior year in any of the acts described in 1a, other than exempted acts, that were not corrected before the first day of the tax year beginning in 2013? ☐	1 c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☒ No If "Yes" list the years: 20 __, 20 __, 20 __, 20 __		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) ☐	2 b	N/A
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 __		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(a)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year "first purchase holding period"? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.) ☐	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? ☐	4 a	X
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? ☐	4 b	X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b N/A

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?N/A ☐ Yes ☐ No

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If 'Yes' to 6b, file Form 3970.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

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
Anne Greenblatt 111 Coolidge St. S. Plainfield, NJ 07080	Trustee 0	0.	0.	0.
Ronald Greenblatt 111 Coolidge Street S. Plainfield, NJ 07080	Trustee 0	0.	0.	0.

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 N/A	
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 N/A	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	0.

BAA

Form 990-PF (2013)

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
a	Average monthly fair market value of securities	1a	1,740,107.
b	Average of monthly cash balances	1b	479,038.
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	2,219,145.
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 1a	3	2,219,145.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	33,287.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	2,185,858.
6	Minimum investment return. Enter 5% of line 5.	6	109,293.

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	109,293
2a	Tax on investment income for 2013 from Part VI, line 5	2a	2,399.
b	Income tax for 2013 (This does not include the tax from Part V.)	2b	
c	Add lines 2a and 2b	2c	2,399.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	106,894.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	106,894.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1	7	106,894.

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	198,132
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	198,132.
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	198,132.

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 X, line 7				106,894.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years. 20 , 20 , 20		0.		
3 Excess distributions carryover, if any, to 2013.				
a From 2008	47,768			
b From 2009	52,282.			
c From 2010	109,094.			
d From 2011	110,227.			
e From 2012	109,297.			
f Total of lines 3a through e	428,663.			
4 Qualifying distributions for 2013 from Part XII, line 4. \$ 198,132.				
a Applied to 2012 but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2013 distributable amount				106,894.
e Remaining amount distributed out of corpus	91,238.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (c))	0			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4e, and 4c. Subtract line 5	519,906.			
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 of 2012. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)	47,768			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	472,138.			
10 Analysis of line 9				
a Excess from 2009	52,282			
b Excess from 2010	109,094.			
c Excess from 2011	110,227			
d Excess from 2012	109,297			
e Excess from 2013	91,238			

Part XV Supplementary Information (continued)**3** Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
<i>a</i> Paid during the year Per schedule attached			Per schedule attached	196,371.
Total.			3 a	196,371.
<i>b</i> Approved for future payment				
Total.			3 b	

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

► Attach to Form 990, Form 990-EZ, or Form 990-PF
► Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2013

Name of the organization **BURTON G AND ANNE C GREENBLATT
FOUNDATION INC**

Employer identification number
52-1638050

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) non-exempt charitable trust not treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received during the year \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(e)(1)(A)(ii) and received from any one contributor, during the year, a contribution of the greater of (i) \$5,000 or (ii) 2% of the amount on (i) Form 990, Part VIII, line 14, or (ii) Form 990-EZ, line 1. (Complete Parts I and II.)

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. (Complete Parts I, II, and III.)

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ► \$

Caution: An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF) but it must answer "No" on Part IV, line 2, of its Form 990 or check the box on line 4 of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not need the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization

Employer identification number

BURTON G AND ANNE C GREENBLATT

52-1638050

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	G&W Laboratories, Inc. 111 Coolidge Street S. Plainfield, NJ 07080	\$ 1,962,149	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
2	Kurt Orlofski 15 N. Crane Rd Mountain Lakes, NJ 07046	\$ 25,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

BURTON G AND ANNE C GREENBLATT

52-1638050

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed.

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

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization

BURTON G AND ANNE C GREENBLATT

Employer identification number

52-1638050

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8) or (10)

organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry

For organizations completing Part III, enter total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.)

\$ N/A

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

2013

Federal Statements

Page 1

Client 13096

BURTON G AND ANNE C GREENBLATT
FOUNDATION INC

52-1638050

7/03/14

03:18PM

Statement 1
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
IRS	\$ 1,681.			\$ 1,681.
NJ	50.			80.
Total	<u>\$ 1,761.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 1,761.</u>

Statement 2
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

Name of Grant Program
Name: ANNE GREENBLATT
Care Of.
Street Address: 111 COOLIDGE STREET
City, State, Zip Code: S. PLAINFIELD, NJ 07080
Telephone
E-Mail Address:
Form and Content: TYPEWRITTEN - ONE PAGE - DESCRIPTION OF ORGANIZATION.
Submission Deadlines: NONE
Restrictions on Awards: CHARITABLE, RELIGIOUS, EDUCATIONAL, MEDICAL AND SCIENTIFIC PURPOSES

GREENBLATT FOUNDATION

	Sale/ Purchase	#	Total #	COST	beg of year market	end of year total
BONDS and FIXED INCOME						
Allegheny Technology Bond 5.875%	2/5/2013		75,000,000	77,029.06		79,447.00
Alcoa Note 5.4%	02/21/2014		25,000,000	25,754.40		26,729.60
Archimedes SA Note 7.75%	03/13/2012	50,000,000	50,000,000	54,405.91	101,750.00	113,372.00
Arrow Economics Ltd Note 4.8%	1/22/2013		75,000,000	74,532.00		76,320.00
Ayres Ltd Note 4.3%	03/11/2014		50,000,000	53,166.00		52,152.00
CenturyLink Comm Note 7.5%	07/10/2012	150,000,000	150,000,000	148,524.73	145,309.00	142,667.00
CG Group Inc Deb Stock 11.5%	10/22/2013		1,000,000	78,814.80		79,309.00
CGI Group Inc 8.0% 10/1/2012	03/11/2012	2,000,000	2,000,000	49,726.00	53,780.00	60,320.00
CGI Group Ltd Note 5.125%	02/17/2011	120,000,000	120,000,000	116,716.45	13,272.00	131,257.40
CGI General Corp 7%	03/13/2012 03/13/2012	50,000,000 50,000,000	50,000,000	45,709.00 157.22 150.34		49,756.00
Countrywide Corp Note 7%	11/03/2011 04/03/2012 04/13/2012	2,000,000 3,100,000 1,400,000		41,805.00 75,846.00 33,719.00	167,252.00	167,225.00
Eastman Kodak Co Note 7.25%	03/01/2014		50,000,000	28,530.00		27,234.00
Goldman Sachs Group Sub Note 6.125%	02/12/2011	120,000,000	120,000,000	119,776.00	129,056.00	133,216.00
Hammerhead Corp Note 6.4%	03/11/2013		20,000,000	20,115.00		21,744.00
Health Care REIT Trust Co Note 6%	03/01/2014		20,000,000	20,059.00		21,480.00
Hydrogen Energy Formula Sub Note 6%	10/20/2013		3,000,000	3125.00		3500.00
ICAR Financial Services	10/20/2012	800,000	800,000	20,000.00	20,000.00	20,000.00
PrimeStar Corp Common 10.125%	03/05/2008	1,000,000	1,000,000	25,000.00	25,000.00	26,532.00
Reynolds International Ltd Note 5.875%	07/11/2013		50,000,000	49,740.00		51,000.00
Reynolds International Ltd Note 5.8%	02/11/2014		50,000,000	50,000.00		52,612.00
Traylor Bros Ltd Note 7.125%	07/10/2013	3,000,000	3,000,000	32,135.00	33,000.00	34,500.00
Univest Financial Services	07/11/2013		50,000,000	51,320.00		52,212.00
US Bancorp Cap Sec Common	10/21/2011		3,000,000	66,550.00		66,200.00
				1,621,174.58	549,782.00	1,715,976.20
EQUITIES - mutual funds						
BlackRock Real Income Fund Strategies Fd III	01/24/2013	5,000,000		95,959.00		
BlackRock	12/07/2009	750,000		10,481.00		
	11/11/2007	5,000,000		466.25		
	06/07/2007	30,000,000		629.13		
	12/15/2005	51,000,000		21,000.00		
	08/09/2005	32,000,000		103.21		
	09/02/2005	32,000,000		106.60		
	10/12/2004	35,850,000		64.58		
	11/13/2003	36,450,000		101.50		
	12/11/2003	27,500,000		672.46		
	12/09/2003	33,225,000		669.12		
	11/19/2003	31,110,000		7,422.86		
	11/05/2003	30,900,000		109.45		
	04/07/2003	37,150,000		103.46		
	10/08/2003	35,000,000		107.49		
	09/26/2003	10,500,000		10.00		
BlackRock	1/23/2011			(694.29)		
BlackRock	10/29/2007	1532,000,000	5,659,000	15.88	91,467.72	92,597.33
BlackRock Capital International	10/16/2007	7,463,000	5,450,000	162,164.65	114,718.50	126,600.70
BlackRock Equity Divident Fund	08/07/2009	5,311,000	3,770,000	20,495.40		
BlackRock	12/01/2010			(3,052.94)		
BlackRock	12/01/2011			(1,511.75)		
BlackRock	12/11/2012			(1,009.06)		
BlackRock	12/27/2012			(3,126.43)		
BlackRock Strategic Global	06/04/2007	4,250,000	4,250,000	159,111.04		
BlackRock	12/01/2011			(1,459.15)	148,612.50	126,517.95
BlackRock Emerging Credit Corp	1/22/2013 12/11/2012 12/11/2012	1,200,000 5,400,000 11,400,000	1,800,000,000	17,310.00 789.07 759.06	43,790.21	41,160.30
				542,685.23	4,400,000.00	428,435.00

BURTON G. & ANNE C. GREENBLATT FOUNDATION, INC
FORM 990-PF

E.I.N. 52-1638050

2013

3/31/2014

PAGE 11, PART XV, LINE 3a - CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME & ADDRESS	Relationship	STATUS	PURPOSE	AMOUNT
Aleph Society 25 West 45th Street New York, NY 10109	None	PUBLIC	Cultural	36,000
American Assn Ben Gurion University PO Box 170305 Milwaukee, WI. 53217-9962	None	PUBLIC	Educational	250
Am Fr of Rabin Medical Center, Inc 220 Fifth Avenue, Suite 1301 New York NY 10001	None	PUBLIC	Health	200
Am. Friends of Siebenberg House Hashmini Street 7 - POB 14276 Upper City, Jerusalem, Israel	None	PUBLIC	Cultural	1,000
American Friends Sarah Herzog Hospital 40 East 34th Street Room 916 New York, N.Y. 10016	None	PUBLIC	Health	5,500
American Friends Tel Aviv University 39 Broadway - 15th floor New York, N.Y. 10012	None	PUBLIC	Educational	200
American Jewish Committee 165 E. 56th Street - Room 814 New York, NY 10126	None	PUBLIC	Educational	100
American Jewish Joint Distribution Committee 711 Third Ave New York, NY 10017	None	PUBLIC	Charitable	250
Birthingright Israel Foundation 33 East 33rd Street - 7th fl New York, NY 10016	None	PUBLIC	Educational	200
Boys Town - Jerusalem 31 Fifth Avenue - Suite 601 New York, NY 10003	None	PUBLIC	Educational	500
Chabad Lubavitch Western Monmouth County 26 Wickatunk Road Manalapan, NJ 07726	None	PUBLIC	Religious	1,000
Chabad South Brunswick 1 Riva Ave North Brunswick, NJ	None	PUBLIC	Educational	500

BURTON G. & ANNE C. GREENBLATT FOUNDATION, INC.

FORM 990-PF

E.I.N 52-1638050

PAGE 11, PART XV, LINE 3a - CONTRIBUTIONS PAID DURING THE YEAR

2013
3/31/2014

RECIPIENT NAME & ADDRESS	Relationship	STATUS	PURPOSE	AMOUNT
Community Food Bank 31 Evans Terminal Road Hillside, NJ 07205-2400	None	PUBLIC	Charitable	200
EHMC Foundation 350 Engle Street Engelwood, NJ 07631-9948	None	PUBLIC	Charitable	500
Elem Youth in Distress-Israel 211 Central Park West #6E New York, NY 10024	None	PUBLIC	Charitable	500
Friends of Lubavitch 513 Kenwood Place Teaneck, NJ 07666	None	PUBLIC	Religious	2,500
Jewish Community Center PO Box 2205 Long Beach Township, NJ 08008	None	PUBLIC	Religious	900
Jewish Home Foundation of Northern NJ 10 Link Drive Rockleigh, N J 07647	None	PUBLIC	Charitable	500
Jewish Museum 5th Avenue at 92nd Street New York, NY 10128	None	PUBLIC	Cultural	100
Jewish National Fund 25 Route 22 East Springfield, NJ 07081	None	PUBLIC	Religious	200
Kean University Union, New Jersey	None	PUBLIC	Educational	3,275
Macular Degeneration Research 22512 Gateway Center Drive Clarksburg, MD 20871-1952	None	PUBLIC	Educational	200
Mayo Clinic PO Box 450 Albert Lea MN 56007-9849	None	PUBLIC	Educational	200
Meals on Wheels 415 East 93rd Street New York, NY 10128	None	PUBLIC	Charitable	478

BURTON G. & ANNE C. GREENBLATT FOUNDATION INC.

FORM 990-PF

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PAGE 11, PART XV, LINE 3a - CONTRIBUTIONS PAID DURING THE YEAR

2013
3/31/2014

RECIPIENT NAME & ADDRESS	Relationship	STATUS	PURPOSE	AMOUNT
Memorial Sloan-Kettering Cancer Center 1275 York Avenue New York NY 10021	None	PUBLIC	Charitable	100
Mesamche Lev 1426 57th Street Brooklyn, NY 11219	None	PUBLIC	Religious	117
NACOEJ 165 East 56th Street New York, NY 10022	None	PUBLIC	Charitable	1,420
National Federation of the Blind PO Box 7482 Baltimore, MD 21227-9908	None	PUBLIC	Medical	200
NCJW 595 Albin Street Teaneck, NJ 07666	None	PUBLIC	Charitable	350
New Apostolic Church 3753 North Troy Street Chicago, IL 60618	None	PUBLIC	Charitable	55 000
Orthodox Union / NCSY 11 Broadway, 14th fl. New York, NY 10004	None	PUBLIC	Religious	1,000
Parkinson Research Foundation PO Box 96318 Washington, DC 20090-6318	None	PUBLIC	Medical	200
Shadowlands Conference & Retreat Center 7616 Business Park Drive Greensboro, NC 27409	None	PUBLIC	Charitable	40,000
Teaneck Jewish Center Sterling and Prince Streets Teaneck, NJ 07666	None	PUBLIC	Religious	2,050
Touro Synagogue Foundation 85 Touro Street Newport, RI 02840	None	PUBLIC	Religious	1,800
Union for Traditional Judaism 811 Palisade Avenue Teaneck, NJ 07666	None	PUBLIC	Educational	30,000

BURTON G. & ANNE C. GREENELATT FOUNDATION, INC.

FORM 990-PF

E I.N. 52-1638050

2013

3/31/2014

PAGE 11, PART XV, LINE 3a - CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME & ADDRESS	Relationship	STATUS	PURPOSE	AMOUNT
Zionist Organization of America 4 East 34th Street New York, N.Y. 10016	None	PUBLIC	Cultural	500
Contributions less than \$201 each	None	PUBLIC		8,381
				196,371