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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 ► 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.

• Positioning ADD 1 2013

1	OMB No 1545-0052
	2012
	/8115
	Open to Public Inspection

For o	alen	dar year 2013 or tax year beginning API	R 1, 2013	, and ending	1	MAR 31, 201	1
		foundation				A Employer identification	n number
		Frank & Fred Friedman	Family			62 000165	-
		ndation				63-092165	<u>L</u>
		nd street (or P O. box number if mail is not delivered to stree	t address)	Roo	m/suite	B Telephone number 205-323-10	524
		Box 430229					
		wn, state or province, country, and ZIP or foreign ningham, AL 35243	postal code			C if exemption application is	pending, check here
		all that apply Initial return	Initial return of a fo	rmar aublia abarit		D 1. Foreign organization	ne chack hara
LS U	Heck	Final return	Amended return	iller public chari	.y	1. roleigh olganization	is, clieck liele . P C.
		Address change	Name change			Foreign organizations no check here and attach or check here.	neeting the 85% test,
н с	heck	type of organization. X Section 501(c)(3) e				E If private foundation st	
Ϊ,	_	ction 4947(a)(1) nonexempt charitable trust	Other taxable private foundar	tion		under section 507(b)(
l Fa			ting method: X Cash	Accrual		F If the foundation is in a	** *
		Part II, col. (c), line 16)	Other (specify)			under section 507(b)(
•	\$	12,545,628. (Part I, cold	umn (d) must be on cash b	asis.)			
Pá	ırt l	Analysis of Revenue and Expenses	(a) Revenue and	(b) Net invest	ment	(c) Adjusted net	(d) Disbursements for charitable purposes
		(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	expenses per books	income		income	(cash basis only)
		Contributions, gifts, grants, etc , received				N/A	
	2	Check X if the foundation is not required to attach Sch B					
	3	Interest on savings and temporary cash investments	65.		65.		Statement
	4	Dividends and interest from securities	6,701.		701.		Statement
	5a	Gross rents	10,985.	10,	985.		Statement
		Net rental income or (loss) 1,667.	604 170	······································	***********	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Statement
ē	6a	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all 844 865	684,172.				
ē	b	assets on line 6a		684,	177	<u> </u>	
Revenue	7	Capital gain net income (from Part IV, line 2)	V	004,	1/2.		
	8	Net short-term capital gain	_ - 	***************************************	***************************************		-
	100	Income modifications Gross sales less returns and allowances	1222 55	······			
	10a	and allowances Less: Cost of goods sold		**********************	*********	·	····
	l	Gross profit or (loss)			·····		
	1	Other income OGDE	<44,319.	> <44,	319.	>	Statement
	12	Total. Add lines 1 through 11	657,604.	657,	604.		
	13	Compensation of officers, directors, trustees, etc	197,060.	61,	990.		
	14	Other employee salaries and wages	19,290.	19,	290.		
	15	Pension plans, employee benefits					
ses	16a	Legal fees Stmt 6	37,370.		685.		
Expens	b	Accounting fees Stmt 7	36,166.		083.		
	C	Other professional fees Stmt 8	30,362.	30,	362.		17.16
i.	1	Interest	17,167.	7	0.		17,16
Administrative	1	Taxes Stmt 9	39,226.		757.	<u> </u>	
inis	19	Depreciation and depletion	14,338.		148.		
Ę	20	Occupancy					
Þ	21	Travel, conferences, and meetings					
and (22	Printing and publications Other expenses Stmt 10	33,764.	9.	051.		
Operating	23	Other expenses Stmt. 10 Total operating and administrative	33,704.				
ē	24		424,743.	167.	366.		17,16
ô	25	expenses. Add lines 13 through 23 Contributions, gifts, grants paid	491,206.				491,20
		Total expenses and disbursements.					
	20	Add lines 24 and 25	915,949.	167.	366.		508,37
	27	Subtract line 26 from line 12			. ,		
		Excess of revenue over expenses and disbursements	<258,345.	>			
		Net investment income (if negative, enter -0-)	***************************************	490,	238.		
		Adjusted net income (if negative, enter -0-)				N/A	
3235	01 0-13	LHA For Paperwork Reduction Act Notice, se	e instructions.			672 10	Form 990-PF (20

63-0921651

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Part II Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	year
Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
1 Cash - non-interest-bearing			
2 Savings and temporary cash investments	3,141,528.	2,337,836.	2,337,836.
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			
7 Other notes and loans receivable			
Less allowance for doubtful accounts			
8 Inventories for sale or use			
9 Prepaid expenses and deferred charges	25 222		25 000
102 investments - 05 and state government obligations Science, 11.	25,000.	25,000.	25,000.
b Investments - corporate stock	168,598.	160,822.	223,272.
c Investments - corporate bonds			
11 Investments land, buildings, and equipment basis 2,599,876.	0 501 061	0 540 014	0.540.014
Less accumulated depreciation Stmt 13 49,962.	2,521,361.	2,549,914.	2,549,914.
12 Investments - mortgage loans	4 040 456	5 260 001	5,403,704.
13 Investments - other	4,849,456.	5,369,891.	5,403,704.
14 Land, buildings, and equipment basis 2,024,242.	1 767	2 002 101	2 002 101
Less. accumulated depreciation	1,767.	2,003,101. 2,801.	2,003,101. 2,801.
15 Other assets (describe ► Statement 15)	0.1	2,001.	2,001.
16 Total assets (to be completed by all filers - see the	10 707 710	12,449,365.	12,545,628.
instructions Also, see page 1, item 1)	10,707,710.	12,449,303.	12,343,020.
17 Accounts payable and accrued expenses			
18 Grants payable			
g 19 Deferred revenue			
20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable		2,000,000.	
21 Mortgages and other notes payable		2/000/000.	
☐ 22 Other liabilities (describe ►)			
23 Total liabilities (add lines 17 through 22)	0.	2,000,000.	
Foundations that follow SFAS 117, check here			
and complete lines 24 through 26 and lines 30 and 31.			
24 Unrestricted			
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 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds Total net assets or fund balances			
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	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	10,707,710.	10,449,365.	
30 Total net assets or fund balances	10,707,710.	10,449,365.	
31 Total liabilities and net assets/fund balances	10,707,710.	12,449,365.	
	lalances		
			
1 Total net assets or fund balances at beginning of year - Part II, column (a), line	30		10 707 710
(must agree with end-of-year figure reported on prior year's return)		1	10,707,710.
2 Enter amount from Part I, line 27a		2	<258,345.
3 Other increases not included in line 2 (itemize)		3	0.
4 Add lines 1, 2, and 3		. 4	10,449,365.
5 Decreases not included in line 2 (itemize)	-1 (1) 1 22		10,449,365.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, c	olumn (D), linė 30	<u> b</u>	Form 990-PF (2013

Foundation

Part IV Capital Gains a	ind Loss		vestment	Income					05 052	1001 /ageo
' (a) List and descri	ibe the kind(s	s) of property sold (e.g. ommon stock, 200 shs	, real estate,		`P:	low ac - Purc - Dona	cquired hase ation		e acquired day, yr)	(d) Date sold (mo., day, yr.)
a Fidelity Invest			<u> </u>		-		P	Var	ious	Various
b Passthrough fro		w Fund One	, LLC				P	Var.	ious	Various
C										
d			· · · · · · · · · · · · · · · · · · ·							
е		······································			<u>l</u>					<u> </u>
					Gain or (loss us (f) minus	(g)				
a 278,798.				160,69	3.					118,105.
b 566,067.										566,067.
C										
d										
e			h - 4	40/04/00						
Complete only for assets showing									(Col. (h) gain t not less tha	
(i) F.M.V as of 12/31/69		djusted basis of 12/31/69		cess of col (i)					s (from col.	(h)) ·
a										118,105.
b										566,067.
С										
d										
8					$\overline{}$				· · · · · · · · · · · · · · · · · · ·	
2 Capital gain net income or (net cap	pıtal loss)	If gain, also enter If (loss), enter -0-	n Part I, line 7 In Part I, line 7	, 7 .	}	2				684,172.
3 Net short-term capital gain or (los	s) as defined	ın sections 1222(5) an	d (6).		٦١					
If gain, also enter in Part I, line 8,	column (c).					•			N/A	
If (loss), enter -0- in Part I, line 8 Part V Qualification U	ndor Coc	tion 4040(a) for	Poducod	Tay on Not	Inv	eetn	nent Ind	come	IN / F	<u> </u>
							1101111111	001110		
(For optional use by domestic private	toundations	subject to the section 2	1940(a) tax on	iiet iiivestiiieiit iii	COLLE	, ,				
If section 4940(d)(2) applies, leave th	is part blank									
Was the foundation liable for the sect	ion 4942 tax	on the distributable am	nount of any ve	ar in the base pei	riod?					Yes X No
if "Yes," the foundation does not quali								· ·		
1 Enter the appropriate amount in e	ach column	for each year; see the II	estructions bef	ore making any e	ntries					
(a)		(b)			(c)				Distri	(d) bution ratio
Base period years Calendar year (or tax year beginnir	ng in)	Adjusted qualifying dis		Net value of no				1	(col. (b) di	vided by col (c))
2012		43	8,234.		10	<u>, 85</u>	7,980).		.040361
2011			4,250.				4,559			.061398
2010			0,032.				5,646			.026239
2009			8,217.				$\frac{1,817}{1,204}$.036943
2008		52	7,439.		12	, 10	11,204	* •		•043366
								١,		.208527
2 Total of line 1, column (d)	F		 line 0 hu E .		r of vo		•	. 2		• 20032
3 Average distribution ratio for the the foundation has been in exister					i ui ye	ais		3		.041705
the foundation has been in exister	nce ii iess tiid	an o years		•	••	••		٠		
4 Enter the net value of noncharitab	le-use asset	s for 2013 from Part X,	line 5 .					4		10,804,900
5 Multiply line 4 by line 3								. 5		450,618.
6 Enter 1% of net investment incom	ne (1% of Pa	rt I. line 27b)						6		4,902
7 Add lines 5 and 6	,	. , .						7		455,520
							- ••	8		508,373
8 Enter qualifying distributions from If line 8 is equal to or greater than					ng a 1	 % tax	rate.	0		300,3131
See the Part VI instructions.										

orm 9	990-PF(2013) Foundation 63-0921			age 4
	t VII Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see	nstruc	ctior	ıs)
`1a E	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1.			
1	Date of ruling or determination letter (attach copy of letter if necessary-see instructions)			
b l	Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🗶 and enter 1%	4	1,9	02.
(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-)			0.
	Add lines 1 and 2	4	1,9	
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0	4	1,9	02.
	Credits/Payments:			
a :	2013 estimated tax payments and 2012 overpayment credited to 2013 6a 13,640 .			
	Exempt foreign organizations - tax withheld at source			
C	Tax paid with application for extension of time to file (Form 8868)			
	Backup withholding erroneously withheld			4.0
	Total credits and payments Add lines 6a through 6d	13	3,0	$\frac{40.}{26.}$
	Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached			26.
	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		7	12
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		3,7	0.
	Enter the amount of line 10 to be: Credited to 2014 estimated tax ▶ 8,712 - Refunded ▶ 11			<u> </u>
	TVII-A Statements Regarding Activities	ŢŢ-	Yes	No
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in		165	X
	any political campaign?	1a		$\frac{\mathbf{x}}{\mathbf{x}}$
	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		
	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.	16	1	х
	Did the foundation file Form 1120-POL for this year?	"		
đ	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation (2) On foundation managers (3) On the foundation managers (4) On the foundation managers (5)			
	(1) On the foundation. > \(\psi \)			
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers.			
	managoro P V	2		Х
	Has the foundation engaged in any activities that have not previously been reported to the IRS?			··
	If "Yes," attach a detailed description of the activities. 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	Ì	X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
	If "Yes," attach the statement required by General Instruction T.			
	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	X	
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	X	
•	big the foundation have at least 40,000 in assets at any time coming the year.			*********
Rع	Enter the states to which the foundation reports or with which it is registered (see instructions)			
Ja	AL			
h	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)			
IJ	of each state as required by General Instruction G? If "No," attach explanation	8b	X	
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		X
	year 2010 in the transport of the control of the co	10		X

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		-09216	51	Page 5
_	rt 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			1
	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.	ges?	- [
	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?	L	13 X	<u> </u>
	Website address ► N/A	<u> </u>	1.60	
14	The books are in care of ▶ Fred Friedman Telephone no ▶2			
		• ₊₄ ► <u>352</u>	10-1	22
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	_ 1)))	-
	and enter the amount of tax-exempt interest received or accrued during the year	<u>i </u>	N/A	T NI -
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank,	1	Yes	1
	securities, or other financial account in a foreign country?	·	16	X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign			
*	country ► Int VII-B Statements Regarding Activities for Which Form 4720 May Be Required			<u></u>
ME			Voc	No
_	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	 	res	IAO
1 a	During the year did the foundation (either directly or indirectly):	X No		
	///aaaa mitta ama at anama at brahand mitta at a familia familia at a familia a	A NO		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	X No		
	(0) 10	X No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available	ਓ		
	101 till 2011 ti	X No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No"	1		
	If the foundation agreed to make a grant to or to employ the official for a period after	₩		
	torrining to the state of the s	X No		
t	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 instructions)?	~ L	1b	X
	Organizations relying on a current notice regarding disaster assistance check here			
•	: 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	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))			
	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?	X No		
	If "Yes," list the years			
ı	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	37/3		
	statement - see instructions)	N/A	2b	
(If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
	<u> </u>			
3	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
		X No		
ı	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			1
	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	se		
	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	+
	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	X
	b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	II.		1
	had not been removed from jeopardy before the first day of the tax year beginning in 2013?		4b	X
		Form	990-PF	(2013)

2 Compensation of five highest-paid employees (other than those in	cluded on line 1). 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			•	(

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)	<u> </u>	OJI Fayer
3 Five highest-paid independent contractors for professional services. If none, enter "NONE."		·
(a) Name and address of each person paid more than \$50,000 (b) Type of servi	ICO	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities	. •	0
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		0.
3		· · · · · · · · · · · · · · · · · · ·
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. 1 N/A		Amount
2		
All other program-related investments See instructions. 3		
Total. Add lines 1 through 3	D	0.
TOTAL AUG III IES 1 UII OUGIT O		rm 990-PF (2013)

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P	Minimum Investment Return (All domestic foundations must o	complete this part. Foreign fou	ndations, s	see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc	, purposes:		
а	Average monthly fair market value of securities		1a	5,605,545.
	Average of monthly cash balances		1b	2,828,259.
	Fair market value of all other assets		10	2,535,638.
ď	Total (add lines 1a, b, and c)		1d	10,969,442.
е	Reduction claimed for blockage or other factors reported on lines 1a and			
	1c (attach detailed explanation)	0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	10,969,442.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see in	nstructions)	4	164,542.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part		5	10,804,900.
6	Minimum Investment return. Enter 5% of line 5		6	540,245.
P.	foreign organizations check here and do not complete this part)	5) private operating foundations ar	id certain	
1	Minimum investment return from Part X, line 6		1	540,245.
2a	Tax on investment income for 2013 from Part VI, line 5	4,902.		
b	Income tax for 2013 (This does not include the tax from Part VI)			
C	Add lines 2a and 2b		20	4,902. 535,343.
3	Distributable amount before adjustments Subtract line 2c from line 1 .		3	535,343.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	535,343.
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, I	ine 1	7	535,343.
P	Qualifying Distributions (see instructions)			
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes			508 373
a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26		1a	508,373.
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.	c , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the			
а	Surtability test (prior IRS approval required)		3a	
b	Cash distribution test (attach the required schedule)		3b	E00 272
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part V		4	508,373.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	nt	_	4 000
	income Enter 1% of Part I, line 27b		5	4,902. 503,471.
6	Adjusted qualifying distributions. Subtract line 5 from line 4		6	
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when c	alculating whether the foundation	qualifies foi	r the section

Form **990-PF** (2013)

4940(e) reduction of tax in those years

Page 9

Part XIII Undistributed Income (see instructions)

1. Distributable amount for 2015 from Part XI, line 7 2. Undestabled income, if we, we at the end of 2015 at Enter amount for 2015 only a Enter amount for 2015 only a Enter amount for 2012 only a Total for print years: 3. Excess distributions carryower, if any, to 2013: a From 2008 b From 2009 c From 2010 d From 2011 e From 2012 f Total of time 3s throughe 4 4. Qualifying distributions for 2013 from Part XI, line 4 ** Ps. \$ 508, 273 e Applied to 2013 distributed income of prior years (Election required - see instructions)		(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
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2. Unactividual months of the end of 2019 3 Testal for prior years: 3 Excess distributions carryover, if any, to 2013: a From 2008 b From 2010 1 Total of time 53 through e 1 Total of time 54 through e 1 Total of time 64	· ·				535,343.
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d Excess from 2012 e Excess from 2013	 	-			
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	e Excess from 2013	<u> </u>		<u> </u>	Form QQQ_DE /0049\

Part XIV Private Operating Fo		tructions and Part V	II-A, question 9)	N/A	21031
1 a If the foundation has received a ruling or			<u> </u>		· · · · · · · · · · · · · · · · · · ·
foundation, and the ruling is effective for			▶		
b Check box to indicate whether the foundation	•	•	in section	4942(J)(3) or 49	(42(j)(5)
2 a Enter the lesser of the adjusted net	Tax year	g touridation dosonious	Prior 3 years	10 12 1/(0/ 01 10	12(1)(0)
income from Part I or the minimum	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
investment return from Part X for		· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·	<u> </u>	··
each year listed					
b 85% of line 2a	-				
c Qualifying distributions from Part XII,					
line 4 for each year listed			Į		
d Amounts included in line 2c not					
used directly for active conduct of					
exempt activities	İ				
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	1				
securities loans (section					
512(a)(5)), or royalties) (2) Support from general public					
and 5 or more exempt					
organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from			+		
,, ,					
an exempt organization (4) Gross investment income					
Part XV Supplementary Info	mation (Comple	te this part only	if the foundation	had \$5,000 or me	ore in assets
at any time during the			ii die iodiadion	1144 40,000 01 111	010 111 000010
1 Information Regarding Foundation					
a List any managers of the foundation who	_	han 2% of the total cor	ntributions received by the	foundation before the clo	se of any tax
year (but only if they have contributed m	nore than \$5,000). (See se	ection 507(d)(2).)			
None					
b List any managers of the foundation who	o own 10% or more of the	stock of a corporation	or an equally large portion	on of the ownership of a p	artnership or
other entity) of which the foundation has			. You am oddainy iai go point	c. (c (c)	aranoromp or
None	-				
2 Information Regarding Contributi	on Grant Gift Loan	Scholarshin, etc., I	Programs:		
Check here ► ☐ If the foundation of				not accept unsolicited requ	uests for funds. If
the foundation makes gifts, grants, etc. (
a The name, address, and telephone numl					· · · · · · · · · · · · · · · · · · ·
N/A	301 01 0 111411 4041000 01 11	10 poroon to mion ap	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
.,					
b The form in which applications should b	e submitted and informat	on and materials they	sponjų rucjudė.		
None	e submitted and informat	ion and materials they	Silouid inicidate.		
					
t Any submission deadlines: None					
d Any restrictions or limitations on awards	e cuch as hy gaographics	l areas chantable field	e kinds of institutions or	other factors	· . · · · · · · · · · · · · · · · · · ·
None	s, such as by geographica	ii aigas, ciidiiladig 11610	อ, หลานอ บา กาอเกนแบกอ, UT (other factors.	
MOTIE					
					200 55

Form 990-PF (2013) Foundation

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the		Payment		·
Recipient	If recipient is an individual,		Durage of great ex	
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
a Paid during the year				
		!		
AG Gaston Boys & Girls Club				
				400.
Alabama Forever				
				1,000.
Alabama Public Television				
				500.
Alys Stephens Center				
				1,000.
Alzheimers Association				250.
Total	ontinuation shee	et(s)	▶ 3a	491,206.
b Approved for future payment				· · · · · · · · · · · · · · · · · · ·
None				
None				
		<u> </u>		
]	
		<u> </u>	> 3b	
Total				0.

Form 990-PF (2013)

Part XVI-A Analysis of Income-Producing Activities

	I Inrelated h	usiness income	Evaluded b	y section 512, 513, or 514	
Enter gross amounts unless otherwise indicated	(a) Business	(b) Amount	(C) Exclusion code	(d) Amount	(e) Related or exempt function income
1 Program service revenue.	code		Code		
a		· 	+-+-		
c					
			1		
f					
g Fees and contracts from government agencies			 		
2 Membership dues and assessments			 		
3 Interest on savings and temporary cash		· · · · · · · · · · · · · · · · · · ·			
investments			14	65.	
4 Dividends and interest from securities			14	6,701.	
5 Net rental income or (loss) from real estate.					
a Debt-financed property					
b Not debt-financed property			16	1,667.	· · · · · · · · · · · · · · · · · · ·
6 Net rental income or (loss) from personal					
property	}				
7 Other investment income			14	<44,319.	•
8 Gain or (loss) from sales of assets other					
than inventory			18	684,172.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
C					<u>-</u>
d					
e					·
12 Subtotal. Add columns (b), (d), and (e)		0	•	648,286.	0
13 Total. Add line 12, columns (b), (d), and (e)				13	648,286
Part XVI-B Relationship of Activities t Line No. Explain below how each activity for which incomplete the foundation's exempt purposes (other than	me is reported in o	column (e) of Part XVI-		· · · · · · · · · · · · · · · · · · ·	plishment of
		·····			
323621 10-10-13					Form 990-PF (201

	IL WAN	Exempt Organ		sters 10 a	ing Transactions	and Relations	iips with Noncha	ntable	9	
1	Did the or			of the followin	g with any other organizati	on described in section	on 501(c) of	T	Yes	No
•					7, relating to political organ		,,, oo 1(o/ oi			-110
2		from the reporting found								
	(1) Cash	=	ation to a nonchanta	DIO OXOTTIPE OTE	jamzation of			1a(1)	1	Х
	(2) Other	•	•• • • •		• •		•• ••	1a(2)		X
h	Other tran			•	• •	, .		1012)		
u			hlo avamat amaniza	tion				15/1		Х
		s of assets to a noncharita hases of assets from a no						1b(1) 1b(2)		X
							•	1b(3)		$\frac{x}{x}$
		al of facilities, equipment,								X
		bursement arrangements						1b(4)		X
		s or loan guarantees		 oina colletatio		•	• •	1b(5)	 	X
_		ormance of services or me						1b(6)	\vdash	X
_		f facilities, equipment, ma	-		-		arkat value of the moods	16		
đ				-	dule Column (b) should al				seis,	
		is given by the reporting i i) the value of the goods,			ed less than fair market val	ue in any transaction	or snamly arrangement, s	IIOW III		
(2)	ine no.	(b) Amount involved			exempt organization	(d) December	of transfers, transactions, and			
(4)	ine no.	(D) Alliquit involved	(c) Ivaille of	N/A	exempt organization	(u) Description	or transiers, transactions, and	snanng ar	rangeme	nts.
			 	N/A						
_			 							 -
_			 					·		
			<u> </u>							
		······································	 							
			 							
			 						-	
		·	 				 			
			 							
			 				 			
			 			- 				
			 			_ 				
								=		
		·· ·								
2a		ndation directly or indirect 501(c) of the Code (other	-		or more tax-exempt organ	ızatıons described	C	☐ Yes	X	No
<u>b</u>	If "Yes," c	omplete the following sch								
		(a) Name of or	ganization		(b) Type of organization	(c) Description of relations	hip		
		N/A			-	<u></u>				
										
						 				
					<u> </u>					
	gn and b	relief it is true, correct, and co	proplete Declaration of pr		g accompanying schedules and taxpayer) is based on all infor	Presid	has any knowledge ret	y the IRS im with th own below X Yes	e prepan (see inst	er
	Sig	nature of officer or truste			Dafe '	Title	—			
		Print/Type preparer's n	ame	Preparer's e	gnature	1	Check if PTIN			
_			_	1 ag	1 Cassen	10/2.	self- employed			
	aid	David P Ka			0.1	1.19114		0047		
	eparer	Firm's name ► L .	Paul Kass	ouf &'	Co., PC	•	Firm's EIN ► 63-0	5906	70	
U	se Only									
		Firm's address ► 22								
		B	irmingham,	AL 35	233-2393		Phone no 205-4			
							-	AA	A DE	10040

Part XV Supplementary Information 3 Grants and Contributions Paid During the N				
Recipient	If recipient is an individual.	Fd-4	D	
Name and address (home or business)	show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
			ı	
merican Cancer Society				5,00
merican Diabetes Association				
				30
merican Heart Association				6,60
American Israel Committee				
				60
Anti Defamation League				25
Arthritis Foundation				
				20
SPCA ,				25
Birmingham Holocaust Education Center		:		15,00
	-			13,00
Big Brothers Big Sisters				
THE DESCRIPTION OF STREET				30
Birmingham Children's Theatre				50
Total from continuation sheets			·	488,05

3 Grants and Contributions Paid During the	Year (Continuation)			<u></u> _
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	contribution	Amount
irmingham Zoo				_
				5
irmingham Humane Society				4
irmingham Jewish Federation				
Tallagada Sowisa Todordoloa				100,0
rantwood Children's Home				5
reast Cancer Research Center				5,0
Camp Smile a Mile				2,0
Chabad of Alabama				
				4,8
hildcare Resources				5
risis Center				
				3
Doctors Without Borders				6

3 Grants and Contributions Paid During the				
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	Contribution	741100114
race's Kitchen				
				5
•				
reater Birmingham Ministries				5
daasah.		:		
			· · · · · · · · · · · · · · · · · · ·	1,3
Heart Gallery Alabama				2
Herb Koster Foundation				3
Hillel Union of Alabama				
				17,0
Jacobson Jewish Community Center				1,8
Jefferson County Board of Education				
				5
Jewish War Veterans of US				1
Junior Achievement				5

Part XV **Supplementary Information** Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to Amount status of contribution any foundation manager Name and address (home or business) recipient or substantial contributor Knesseth Israel 172,408. Lakeshore Foundation 400. Levite Jewish Community Center 8,000. Magic City Harvest 400. March of Dimes 300. Marcus Jewish Community Center 6,440. McWane Science Center 500. Memorial Sloan Kettering Hospital 650. Fund N.E. Miles Jewish Day School 15,700. National Jewish Health Hospital 2,250. Total from continuation sheets

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Foundation Purpose of grant or show any relationship to **Amount** status of contribution any foundation manager Name and address (home or business) recipient or substantial contributor National Tay Sachs 500. Norma Livingston Cancer Foundation 2,000. Oasis 500. Orthodox Union 200. Peace Love and Dog Paws 250. Rabbi Abraham Leib 400. Rabbi Grafman Endowment Fund 300. Ramah Dorom 2,500. Red Mountain Theatre 1,600. Shelby County Humane Society 300. Total from continuation sheets

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager Foundation Purpose of grant or Amount status of contribution Name and address (home or business) recipient or substantial contributor Southern Poverty Law Center 350. St. Judes Hospital 500. Temple Beth El 73,153. Temple Emanu-El 20,600. The Horizons School 900. The Seeing Eye 300. Theatre Aspen 250. Torah Fund 3,000. United States Holocaust Museum 750. Urban Ministries 400. Total from continuation sheets

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Purpose of grant or contribution Foundation Amount status of Name and address (home or business) recipient Women's Fund of Greater Birmingham 400. YWCA 5,000. 2aka International 150. Total from continuation sheets

Form **8868**

(Rev. January 2014)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

▶ Information about Form 8868 and its instructions is at www.irs.gov/form8868

OMB No. 1545-1709

If you	are filing for an Automatic 3-Month Extension, complete	te only Pa	rt I and check this box			> X
If you	are filing for an Additional (Not Automatic) 3-Month Ex	tension, c	complete only Part II (on page 2 of t	this form).		
Do not	complete Part II unless you have already been granted a	an automa	itic 3-month extension on a previous	ly filed Fo	m 8868.	
Electro	nic filing (e-file). You can electronically file Form 8868 if y	ou need a	a 3-month automatic extension of tim	ne to file (6	months fo	r a corporation
required	to file Form 990-T), or an additional (not automatic) 3-moi	nth extens	sion of time. You can electronically fi	le Form 88	368 to requ	est an extension
	o file any of the forms listed in Part I or Part II with the exc	-				
Persona	I Benefit Contracts, which must be sent to the IRS in pap	er format	(see instructions). For more details o	n the elec	tronic filing	of this form,
	w.irs.gov/efile and click on e-file for Charities & Nonprofits					
Part					 	
A corpo	ration required to file Form 990-T and requesting an autor	natic 6-mo	onth extension - check this box and o	complete		. —
Part I or	• • • • • • • • • • • • • • • • • • • •					. ▶ 🗀
	corporations (including 1120-C filers), partnerships, REM come tax returns.	ICs, and t	rusts must use Form 7004 to reques			
		-41				ring number
Туре ог			.,	Employer	dentificat	on number (EIN) or
print	The Frank & Fred Friedman I	amit	Y		63_00	921651
File by the	Foundation			0		-
due date f filing your return Sec	P.O. Box 430229	ee instruc	tions.	Social se	curity numl	oer (SSN)
instruction		oreign add	Iress, see instructions.			
						0 4
Enter th	e Return code for the return that this application is for (file	a separa	te application for each return)	• • • • •	•	<u> </u>
Applica	tion	Return	Application			Return
ls For		Code	Is For			Code
Form 99	00 or Form 990-EZ	01	Form 990-T (corporation)			07
Form 99	90-BL	02	Form 1041-A			08
Form 4	720 (individual)	03	Form 4720 (other than individual)			09
Form 9	90-PF	04	Form 5227			10
Form 9	90-T (sec. 401(a) or 408(a) trust)	05	Form 6069			11
Form 9	90-T (trust other than above)	06	Form 8870			12
	Fred Friedman			. 170	^	
	books are in the care of \triangleright P.O. Box 430229	9 – B		6-1/2		
	phone No. ► 205-323-1624		Fax No. >			. —
	organization does not have an office or place of busines					P
	s is for a Group Return, enter the organization's four digit					
box 🕨					ers the ext	ension is for.
1	request an automatic 3-month (6 months for a corporation November 15, 2014, to file the exemp				The extens	sion
IS	for the organization's return for:					
Þ	calendar year or		V2D 21 2014			
	X tax year beginning APR 1, 2013	, ar	nd ending MAR 31, 2014		- ·	
2 11	the tax year entered in line 1 is for less than 12 months, o	check reas	son: Initial return	Final retur	'n	
	Change in accounting period	0000			1	
	this application is for Forms 990-BL, 990-PF, 990-T, 4720	, or bubs,	enter the tentative tax, less any	3a	\$	4,886.
	onrefundable credits. See instructions.) ontor on	w refundable execute and		-	1,000.
	this application is for Forms 990-PF, 990-T, 4720, or 6069 stimated tax payments made. Include any prior year over			3ь	s	13,640.
	alance due. Subtract line 3b from line 3a. Include your pa				Ψ	20,0100
	y using EFTPS (Electronic Federal Tax Payment System).			3с	\$	0.
Cautio	n. If you are going to make an electronic funds withdrawa	(direct de	ebit) with this Form 8868, see Form 8		nd Form 88	79-EO for payment
LHA	For Privacy Act and Paperwork Reduction Act Notice	, see instr	ructions.		Form	8868 (Rev. 1-2014)
323841 12-31-13						

Form 990-PF Intere	st on Saving	s and Tempor	ary Cash In	vestments	Statement 1
Source			(a) Revenue Net In Per Books In		(c) Adjusted Net Income
Fidelity Investment	s		65.	65.	
Total to Part I, li	ne 3		65.	65.	
Form 990-PF	Dividends	and Interest	from Secur	rities	Statement 2
Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Inves ment Inco	
Charles Schwab Investments Fidelity	8.	0.	8.		8.
Investments	6,693.	0.	6,693.	6,69	93.
To Part I, line 4	6,701.	0.	6,701.	6,70	01.
Form 990-PF		Rental Incom	e		Statement 3
Kind and Location of	of Property			Activity Number	Gross Rental Income
Mobile Home Park				1	10,985.
Total to Form 990-F	PF. Part I.]	line 5a			10,985.

Description Depreciation Lights, Heat and Water		Activity		
Lights, Heat and Water		Number	Amount	Total
Insurance Repairs and Maintenance			267. 560. 7,996. 495.	
	rotal -	1		9,318
Total rental expenses				9,318
Net rental Income to Form 990-PF	F, Part	I, line 5b		1,667
Form 990-PF	Other	Income		Statement
Description		(a) Revenue Per Books	(b) Net Invest- ment Income	
Magellan Midstream Partners Investment Income Snow Fund One, LLC Investment		70	4. 704	
Income		<45,02	3.> <45,023	.>
Total to Form 990-PF, Part I, 1:	ine 11 =	<44,31	9.> <44,319	.>
Form 990-PF	Lega	l Fees		Statement
	(a) xpenses er Books	(b) Net Inves ment Inco		
Legal	37,370	. 18,6	85 .	
To Fm 990-PF, Pg 1, ln 16a	37,370			

Form 990-PF	Accounti	ng Fees	Statement '		
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Accounting	36,166.	18,083.		0.	
To Form 990-PF, Pg 1, ln 16b	36,166.	18,083.		0.	
Form 990-PF 0	Other Profes	sional Fees	S	tatement 8	
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Asset Management Fee Payroll Service Fee	28,698. 1,664.	28,698. 1,664.		0.	
To Form 990-PF, Pg 1, ln 16c	30,362.	30,362.		0.	
Form 990-PF	Тах	es	S	tatement 9	
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Shelby County Payroll Taxes Automobile tags Estimated Tax - 990-W	3,006. 16,583. 73. 13,640.	4,751.		0. 0. 0.	
Excise Tax due on 2012 990-PF	5,924.	0.		0.	
To Form 990-PF, Pg 1, ln 18	39,226.	7,757.		0.	

Form 990-PF	Other E	xpenses			Statement	10
Description	(a) Expenses Per Books	(b) Net Inves ment Inco		(c) Adjusted Net Incom		
Telephone	825.		0.			0 .
Travel	14,965.		0.			0
Miscellaneous	297.		0.			0
Nondeductible Partnership	_					_
Expenses	3.		0.			0
Repairs and Maintenance	7,997.		0.			0
Bank Fees	414.		0.			0
Penalties and interest	212.	,	0. 560.			0
Lights, Heat and Water	560 .					0
Insurance	7,996. 495.		996. 495.			0
Repairs and Maintenance	495.		495.			
To Form 990-PF, Pg 1, ln 23	33,764.	9.0	051.			0
Form 990-PF U.S. and	State/City G	overnment 	Obli	gations	Statement	1
Description Various State and Municipal	U.S Gov'	. Other		k Value 25,000.	Fair Marke Value	et
Description Warious State and Municipal Obligations	U.S Gov'	. Other t Gov't		k Value	Fair Marko Value	et
Description	U.S Gov'	Other t Gov't X		k Value	Fair Marko Value	et 000
Description Various State and Municipal Obligations Total U.S. Government Obligations Total State and Municipal Government to Form 990-PF, Part I	U.S Gov' tions vernment Obl	Other t Gov't X		k Value 25,000.	Fair Marke Value 25,	et 000
Description Various State and Municipal Obligations Total U.S. Government Obligations	U.S Gov' tions vernment Obl	Other t Gov't X igations		25,000.	Fair Marke Value 25,	0000 000
Description Various State and Municipal Obligations Total U.S. Government Obliga Total State and Municipal Go Total to Form 990-PF, Part I	U.S Gov' tions vernment Obl	Other t Gov't X igations	Воо	25,000.	Fair Marke Value 25, 25,	0000 000 1
Description Various State and Municipal Obligations Total U.S. Government Obliga Total State and Municipal Go Total to Form 990-PF, Part I	U.S Gov' tions vernment Obl	Other t Gov't X igations	Воо	k Value 25,000. 25,000.	Fair Marke Value 25, 25, 25, Statement	0000 000 1

Form 990-PF Depreciation of As	Statement 13		
Description	Cost or Other Basis	Accumulated Depreciation	Book Value
Mobile Home	3,000.	2,866.	134.
Total to Fm 990-PF, Part II, ln 1	3,000.	2,866.	134.
Form 990-PF Ot	her Investments		Statement 14
Description	Valuation Method	Book Value	Fair Market Value
Magellan Midstream Partners Snow Fund One, LLC	COST	8,031. 5,361,860.	41,844. 5,361,860.
Total to Form 990-PF, Part II, li	ne 13	5,369,891.	5,403,704.
Form 990-PF	Other Assets		Statement 15
Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value
Due from closing attorney	0.	2,801.	2,801.
To Form 990-PF, Part II, line 15	0.	2,801.	2,801.