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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 05-01-2013 , and ending 04-30-2014

Name of foundation THE ISRAEL ROSE HENRY & ROBERT WIENER CHARITABLE FOUNDATION		A Employer identification number 20-1125267	
Number and street (or P O box number if mail is not delivered to street address) 7401 SW 56TH COURT		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code MIAMI, FL 33143		B Telephone number (see instructions) (305) 662-6868	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		C If exemption application is pending, check here ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 5,402,734		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	85,365	80,911		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	306,699			
	b Gross sales price for all assets on line 6a 1,703,063				
	7 Capital gain net income (from Part IV, line 2) . . .		306,699		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	2,195	2,195		
	12 Total. Add lines 1 through 11	394,259	389,805		
	13 Compensation of officers, directors, trustees, etc	30,000	30,000		
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits	2,295	2,295		
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	440	440		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	65,465	65,465		
	24 Total operating and administrative expenses. Add lines 13 through 23	98,200	98,200		0
	25 Contributions, gifts, grants paid	261,750			261,750
	26 Total expenses and disbursements. Add lines 24 and 25	359,950	98,200		261,750
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	34,309			
	b Net investment income (if negative, enter -0-)		291,605		
	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	125,344	74,866	74,866
	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		1,960	1,960
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	4,587,373	4,670,654	5,325,908
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)	2,432		
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	4,715,149	4,747,480	5,402,734
	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)			
Net Assets or Fund Balances	22	Other liabilities (describe ▶ _____)	7,687		
	23	Total liabilities (add lines 17 through 22)	7,687	0	
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			
	27	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	4,707,462	4,747,480	
	30	Total net assets or fund balances (see page 17 of the instructions)	4,707,462	4,747,480	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	4,715,149	4,747,480	

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	4,707,462
2	Enter amount from Part I, line 27a	2	34,309
3	Other increases not included in line 2 (itemize) ▶ _____	3	5,709
4	Add lines 1, 2, and 3	4	4,747,480
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	4,747,480

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	306,699
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	8,360

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	264,940	5,273,245	0 050242
2011	457,903	5,343,205	0 085698
2010	269,589	5,047,164	0 053414
2009	270,300	5,468,171	0 049432
2008	322,000	5,399,299	0 059637

2	Total of line 1, column (d).	2	0 298423
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 059685
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	5,306,224
5	Multiply line 4 by line 3.	5	316,702
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,916
7	Add lines 5 and 6.	7	319,618
8	Enter qualifying distributions from Part XII, line 4.	8	261,750

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 VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		1	5,832		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)							
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		2			
c		All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).					
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-).				2	
3		Add lines 1 and 2.				3	5,832
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-).		4			
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	5,832		
6		Credits/Payments		7	1,960		
a		2013 estimated tax payments and 2012 overpayment credited to 2013					
b		Exempt foreign organizations—tax withheld at source					
c		Tax paid with application for extension of time to file (Form 8868)					
d		Backup withholding erroneously withheld					
7		Total credits and payments. Add lines 6a through 6d.		7			
8		Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8			
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	3,872		
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-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? 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.	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ _____ (2) On foundation managers \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? 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? If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? 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): _____			
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 JOAN ROZANSKY Telephone no (305) 662-6868 Located at 7401 SW 56 COURT MIAMI FL ZIP+4 33143			
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		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		
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))?	☐ 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		
	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).	☐ Yes	☐ No	
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		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?			
		☐ Yes	☒ No	
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
JOAN ROZANSKY 	MANAGER	30,000	0	0
7401 SW 56 COURT	5 00			
MIAMI,FL 33143				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

Part VIII

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

NONE

Total number of others receiving over \$50,000 for professional services. 1

Part IX-A

Expenses

1

Part IX-B

Amount

1 N/A

Total. Add lines 1 through 3

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	5,282,767
b	Average of monthly cash balances.	1b	102,302
c	Fair market value of all other assets (see instructions).	1c	1,960
d	Total (add lines 1a, b, and c).	1d	5,387,029
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	5,387,029
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	80,805
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	5,306,224
6	Minimum investment return. Enter 5% of line 5.	6	265,311

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	265,311
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	5,832
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	5,832
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	259,479
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	259,479
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	259,479

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	261,750
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	261,750
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	261,750
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				259,479
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			258,304	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 261,750				
a Applied to 2012, but not more than line 2a			258,304	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2013 distributable amount.				3,446
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				256,033
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				
d Excess from 2012. . . .				
e Excess from 2013. . . .				

Part XIV

Private Operating Foundations (see instructions and Part VII-A, question 9)

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV

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

1

Information Regarding Foundation Managers:

a

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

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

Form 990-PF (2013)

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	261,750
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Part XVII

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

1

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

a

Transfers from the reporting foundation to a noncharitable exempt organization of

(1)

Cash.

(2)

Other assets.

b

Other transactions

(1)

Sales of assets to a noncharitable exempt organization.

(2)

Purchases of assets from a noncharitable exempt organization.

(3)

Rental of facilities, equipment, or other assets.

(4)

Reimbursement arrangements.

(5)

Loans or loan guarantees.

(6)

Performance of services or membership or fundraising solicitations.

c

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

d

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

Yes

No

1a(1)

No

1a(2)

No

1b(1)

No

1b(2)

No

1b(3)

No

1b(4)

No

1b(5)

No

1b(6)

No

1c

No

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

2a

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

Yes

No

b

If "Yes," complete the following schedule

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

Sign Here

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

Signature of officer or trustee

2014-11-24

Date

Title

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

Yes

No

Paid Preparer Use Only

Print/Type preparer's name
CAROL L SOKOLOW
CPA

Preparer's Signature

Date
2014-11-24

Check if self-employed ☒

PTIN
P00125975

Firm's name
CAROL L SOKOLOW CPA PA

Firm's EIN
59-3542003

Firm's address
9500 S DADELAND BLVD STE 700 MIAMI, FL 331562849

Phone no
(305) 357-3700

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)
SCHWAB 7670 - PUBLICALLY TRADED SEC	P	2014-01-01	2014-04-30
SCHWAB 7670 - PUBLICALLY TRADED SEC	P	2013-01-01	2014-04-30
SCHWAB 7255 - PUBLICALLY TRADED SEC	P	2014-01-01	2014-04-30
SCHWAB 7255 - PUBLICALLY TRADED SEC	P	2013-01-01	2014-04-30
SCHWAB 2208 - PUBLICALLY TRADED SEC	P	2014-01-01	2014-04-30
SCHWAB 2208 - PUBLICALLY TRADED SEC	P	2013-01-01	2014-04-30
SCHWAB 4646 - PUBLICALLY TRADED SEC	P	2014-01-01	2014-04-30
SCHWAB 4646 - PUBLICALLY TRADED SEC	P	2013-01-01	2014-04-30
SANDALWOOD OVERSEAS FUND	P	2004-07-31	2013-11-30
CAPITAL GAIN DISTRIBUTIONS	P	2014-01-01	2014-04-30

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)
24,516		22,939	1,577
233,942		163,645	70,297
		349	-349
229,705		236,990	-7,285
207,255		212,891	-5,636
148,691		86,673	62,018
25,000		25,121	-121
321,065		320,595	470
500,000		327,161	172,839
12,889			12,889

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	
			1,577
			70,297
			-349
			-7,285
			-5,636
			62,018
			-121
			470
			172,839
			12,889

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				
GREATER MIAMI JEWISH FEDERATION 4200 BISCAYNE BLVD MIAMI,FL 33137	NONE	501 (C) (3)	DONATION	5,000
YESHIVA OF GREATER WASHINGTON 2010 LINDEN LANE SILVER SPRING,MD 20910	NONE	501 (C) (3)	DONATION	1,000
ROCK N'RUN 9771 SOUTH DIXIE HWY PINECREST,FL 33156	NONE	501 (C) (3)	DONATION	1,000
UNIVERSITY OF MIAMI HILLEL 1100 STANFORD DRIVE CORAL GABLES,FL 33146	NONE	501 (C) (3)	DONATION	4,600
JFCS OF GREATER PHILADELPHIA 2100 ARCH ST 5TH FLOOR PHILADELPHIA,PA 19103	NONE	501(C)(3)	DONATION	1,800
SMART LOVE FAMILY SERVICES 800 WBUENA AVENUE CHICAGO,IL 60613	NONE	501(C)(3)	DONATION	750
TEMPLE BETH AM 5950 NORTH KENDALL DRIVE PINECREST,FL 33156	NONE	501(C)(3)	DONATION	2,000
FRIENDS OF THE MARCH OF THE LIVING 18900 NE 25 AVENUE NORTH MIAMI BEACH,FL 33180	NONE	501(C)(3)	DONATION	1,800
JCS KOSHER FOOD 735 NE 125 STREET NORTH MIAMI,FL 33161	NONE	501(C)(3)	DONATION	3,600
THE FIRST TEE MIAMI-DADE AMAT GOLF 1802 NW 37TH AVE MIAMI,FL 33125	NONE	501(C)(3)	DONATION	2,500
HILLEL INTERNATIONAL 800 EITH ST NW WASHINGTON,DC 20001	NONE	501(C)(3)	DONATION	30,000
BIRTHRIGHT ISRAEL 33 EAST 33RD ST NEW YORK,NY 10016	NONE	501(C)(3)	DONATION	1,000
CENTER FOR ADVANCEMENT OF JEWISH ED 4200 BISCAYNE BLVD MIAMI,FL 33137	NONE	501(C)(3)	DONATION	1,000
CONGREGATION ETZ CHAIM 1881 NE 26TH ST WILTON MANORS,FL 33305	NONE	501(C)(3)	DONATION	5,000
JEWISH NATIONAL FUND 42 E 69TH ST NEW YORK,NY 10021	NONE	501(C)(3)	DONATION	1,800
Total  3a				261,750

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				
NESHAMA CULTURAL ARTS SOCIETY 11155 SW 112TH AVE MIAMI, FL 33176	NONE	501(C)(3)	DONATION	1,000
TEMPLE JUDEA 5500 GRANADA BLVD CORAL GABLES, FL 33146	NONE	501(C)(3)	DONATION	2,800
JEWISH FEDERATION OF PALM BCH COUNT 4601 COMMUNITY DR WEST PALM BEACH, FL 33417	NONE	501(C)(3)	DONATION	50,000
ALPERT JEWISH & CHILDREN FAMILY SER 5841 CORPORATE WAY WEST PALM BEACH, FL 33407	NONE	501(C)(3)	DONATION	65,000
HILLEL OF BROWARD AND PALM BCH 777 GLADES RD BOCA RATON, FL 33431	NONE	501(C)(3)	DONATION	18,000
UNIV OF MIAMI MILLER SCL OF MED PO BOX 016960 R-100 MIAMI, FL 33101	NONE	501(C)(3)	DONATION	5,000
BAPTIST HEALTH SOUTH FOUND 8900 N KENDALL DR MIAMI, FL 33176	NONE	501(C)(3)	DONATION	5,000
THE CHILDRENS HOSP OF PHIL 3400 CIVIC CENTER BLVD PHILADELPHIA, PA 19104	NONE	501(C)(3)	DONATION	1,000
UNIV OF MIAMI FROST SCL OF MUSIC 1314 MILLER DRIVE CORAL GABLES, FL 33146	NONE	501(C)(3)	DONATION	10,000
FRIENDS OF MIAMI MARINE STADIUM 7770 SW 31 ST MIAMI, FL 33155	NONE	501(C)(3)	DONATION	1,000
PAMM ATTN LEANN STANDISH 1103 BISCAYNE BLVD MIAMI, FL 33132	NONE	501(X)(3)	DONATION	2,500
THE MIAMI FOUNDATION 200 BISCAYNE BLVD 505 MIAMI, FL 33131	NONE	501(C)(3)	DONATION	1,000
MIAMI MUSIC PROJECT 2125 BISCAYNE BLVD 215 MIAMI, FL 33137	NONE	501(C)(3)	DONATION	1,000
NEW WORLD SYMPHONY 500 17TH ST MIAMI BEACH, FL 33139	NONE	501(C)(3)	DONATION	2,000
ARSHT CENTER FOR THE PERFORMING ART 1300 BISCAYNE BLVD MIAMI, FL 33132	NONE	501(C)(3)	DONATION	14,000
Total  3a				261,750

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				
MUCICAL ARTS ASSOC OF MIAMI 200 S BISCAYNE BLVD 3300 MIAMI,FL 33131	NONE	501(C)(3)	DONATION	1,000
BEARTOOTH HOSPITAL AND HEALTH CENTE PO BOX 1290 RED LODGE,MT 59068	NONE	501(C)(3)	DONATION	1,000
FLORIDA GRAND OPERA 8390 N KENDALL DRIVE MIAMI,FL 33122	NONE	501(C)(3)	DONATION	1,000
COMMUNITY TELEVISION FOUND OF SOFL PO BOX 610002 MIAMI,FL 33261	NONE	501(C)(3)	DONATION	1,000
PATRICIA & PHILLIP FROST ART MUSEU 10975 SW 17TH STREET MIAMI,FL 33199	NONE	501(C)(3)	DONATION	1,000
MIAMI CITY BALLET 2200 LIBERTY AVE MIAMI BEACH,FL 33139	NONE	501(C)(3)	DONATION	1,000
MONTANA SHAKESPEARE IN THE PARKS PO BOX 174120 BOZEMAN,MT 59717	NONE	501(C)(3)	DONATION	1,000
HEALTH INFORMATION PROJECT 4601 PONCE DE LEON BLVD CORAL GABLES,FL 33146	NONE	501(C)(3)	DONATION	1,800
CONGREGATION BETH AARON PO BOX 187 BILLINGS,MT 59013	NONE	501(C)(3)	DONATION	1,000
JEWISH COMMUNITY SERVICES 735 NE 125 STREET BORTH MIAMI,FL 33161	NONE	501(C)(3)	DONATION	1,800
MARGAUX'S MIRACLE FOUNDATION 2601 NW 29TH DRIVE BOCA RATON,FL 33434	NONE	501(C)(3)	DONATION	1,000
UNITED WAY OF MIAMI DADE 3250 SW 3RD AVE MIAMI,FL 33129	NONE	501(C)(3)	DONATION	2,500
FEEDING SOUTH FLORIDA 5850 NW 32 AVE MIAMI,FL 33142	NONE	501(C)(3)	DONATION	2,500
CHILDREN'S BEREAVEMENT CENTER 7600 SOUTH RED ROAD MIAMI,FL 33143	NONE	501(C)(3)	DONATION	1,000
FAIRCHILD TROPICAL BOTANIC GARDEN 10901 OLD CUTLER ROAD CORAL GABLES,FL 33146	NONE	501(C)(3)	DONATION	1,000
Total  3a				261,750

TY 2013 Compensation Explanation

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Person Name	Explanation
JOAN ROZANSKY	

TY 2013 Investments - Other Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
SCHWAB 2065-7255	AT COST	2,522,228	2,764,508
SCHWAB 5125-4646	AT COST	922,987	926,687
SCHWAB 8075-2208	AT COST	406,622	474,654
SCHWAB 9050-7670	AT COST	345,452	421,344
SANDALWOOD OVERSEAS FUND	AT COST	473,365	738,715

TY 2013 Other Assets Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT

WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ESTIMATED TAXES	2,432		

TY 2013 Other Expenses Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
INSURANCE	1,026	1,026		
INVESTMENT ADVISORY FEES	64,439	64,439		

TY 2013 Other Income Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS SETTLEMENT	1,322	1,322	
MISCELLANEOUS INCOME	873	873	

TY 2013 Other Increases Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Description	Amount
REFUND OF PRIOR YEAR'S TAXES	4,106
ADJUSTMENT TO VALUES OF INVESTMENTS	1,603

TY 2013 Other Liabilities Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT
WIENER CHARITABLE FOUNDATION
EIN: 20-1125267

Description	Beginning of Year - Book Value	End of Year - Book Value
FUTURES FUND LP	7,687	

TY 2013 Taxes Schedule

Name: THE ISRAEL ROSE HENRY & ROBERT

WIENER CHARITABLE FOUNDATION

EIN: 20-1125267

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ANNUAL FILING FEE	61	61		
FOREIGN TAXES	379	379		