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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 separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

07/01, 2013, and ending

06/30, 2014

Name of foundation **THE MORRIS & BESSIE ALTMAN FOUNDATION**
C/O PETER STERN**A Employer identification number**
03-0323120

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

B Telephone number (see instructions)
(802) 985-9943

PO BOX 458

City or town, state or province, country, and ZIP or foreign postal code

SHELBURNE, VT 05482

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, col (c), line
16) **\$ 4,741,680.****J Accounting method** ☒ Cash ☐ Accrual☐ Other (specify) _____

(Part I, column (d) must be on cash basis.)

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(b)(1)(A), check here ☐**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)
1 Contributions, gifts, grants, etc., received (attach schedule)	102,500.			
2 Check ☐ if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	104.	104.		ATCH 1
4 Dividends and interest from securities	150,861.	150,861.		ATCH 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	284,730.			
b Gross sales price for all assets on line 6a	1,132,590.			
7 Capital gain net income (from Part IV, line 2)		284,730.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	1,364.	1,364.		
12 Total. Add lines 1 through 11	539,559.	437,059.		
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)	6,406.	2,218.		4,188.
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see instructions)	11,391.	664.		
19 Depreciation (attach schedule) and depletion	366.			
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)	23,147.	22,933.		206.
24 Total operating and administrative expenses Add lines 13 through 23	41,310.	25,815.		4,394.
25 Contributions, gifts, grants paid	290,350.			290,350.
26 Total expenses and disbursements. Add lines 24 and 25	331,660.	25,815.	0	294,744.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	207,899.			
b Net investment income (if negative, enter -0-)		411,244.		
c Adjusted net income (if negative, enter -0-)				

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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				
	2	Savings and temporary cash investments		75,937.	211,791.	211,791.
	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				
	10 a	Investments - U S and state government obligations (attach schedule) . .				
	b	Investments - corporate stock (attach schedule) ATCH 7	1,586,672.	1,757,880.	2,764,468.	
	c	Investments - corporate bonds (attach schedule) ATCH 8	235,313.	185,762.	188,594.	
	11	Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶				
	12	Investments - mortgage loans				
	13	Investments - other (attach schedule) ATCH 9	1,619,152.	1,569,906.	1,576,277.	
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶	14,993. 14,443.	916.	550.	550.
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)		3,517,990.	3,725,889.	4,741,680.	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons . .				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)		0	0		
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	3,517,990.	3,725,889.		
	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 . .				
	30	Total net assets or fund balances (see instructions)	3,517,990.	3,725,889.		
	31	Total liabilities and net assets/fund balances (see instructions)	3,517,990.	3,725,889.		

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	3,517,990.
2	Enter amount from Part I, line 27a	2	207,899.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	3,725,889.
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	3,725,889.

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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 PART IV SCHEDULE					
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					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)			2	284,730.	
{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }					
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)			3	0	
{ If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }					

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 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	157,613.	3,391,557.	0.046472
2011	180,849.	2,153,249.	0.083989
2010	221,421.	2,007,963.	0.110271
2009	187,600.	1,890,155.	0.099251
2008	168,651.	1,771,457.	0.095205
2 Total of line 1, column (d)			2 0.435188
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 0.087038
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			4 4,422,026.
5 Multiply line 4 by line 3			5 384,884.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 4,112.
7 Add lines 5 and 6			7 388,996.
8 Enter qualifying distributions from Part XII, line 4			8 294,744.

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 "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary - see instructions)	1	8,225.
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2	3	8,225.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	8,225.
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	5,292.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	6,850.
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	12,142.
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	36.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	3,881.
11	Enter the amount of line 10 to be Credited to 2014 estimated tax ☐ 3,881. 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 Instructions for the 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		X
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 ☐ \$ _____ (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		X
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?		X
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
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 II, col. (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ VT, _____		
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.		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.		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	X	

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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?	13	X	
Website address N/A				
14	The books are in care of PETER STERN Telephone no 802-985-9943			
	Located at PO BOX 458 SHELburne, VT ZIP+4 05482			
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.	15		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes X	No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country CAYMAN ISLANDS				

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? ☐ 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 after termination of government service, if 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(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No	1b	
Organizations relying on a current notice regarding disaster assistance check here ☐		
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? ☐ Yes ☒ No	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))		
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 ☐		
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.) ☐ Yes ☒ No	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 ☐		
3a 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(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.) ☐ Yes ☒ No	3b	X
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? ☐ Yes ☒ No	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 had not been removed from jeopardy before the first day of the tax year beginning in 2013? ☐ Yes ☒ No	4b	X

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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)?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?☐ 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?

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?**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
ATCH 11		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 ☐

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 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 NONE	
Total. Add lines 1 through 3 ▶	

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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	4,344,769.
b	Average of monthly cash balances	1b	143,864.
c	Fair market value of all other assets (see instructions)	1c	733.
d	Total (add lines 1a, b, and c)	1d	4,489,366.
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	4,489,366.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	67,340.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,422,026.
6	Minimum investment return. Enter 5% of line 5	6	221,101.

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	221,101.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	8,225.
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	8,225.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	212,876.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	212,876.
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	212,876.

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	294,744.
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	294,744.
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	294,744.
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				212,876.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only				
b Total for prior years 20 <u>11</u> , 20 <u>10</u> , 20 <u>09</u>				
3 Excess distributions carryover, if any, to 2013				
a From 2008				
b From 2009				
c From 2010				
d From 2011				71,570.
e From 2012				
f Total of lines 3a through e	71,570.			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ <u>294,744.</u>				
a Applied to 2012, but not more than line 2a				
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				212,876.
e Remaining amount distributed out of corpus	81,868.			
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	153,438.			
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				
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	153,438.			
10 Analysis of line 9				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				71,570.
d Excess from 2012				
e Excess from 2013				81,868.

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

NOT APPLICABLE

1 a 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 foundation is a private operating foundation described in section

4942(j)(3) or

4942(j)(5)

2 a 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 foundation 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))

PETER STERN

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

NONE

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 or e-mail address of the person to whom applications should be addressed:

ATCH 12

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

ATCH 13

c Any submission deadlines

NONE

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

NONE

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
a <i>Paid during the year</i> SEE ATTACHED STATEMENT B				290,350.
Total ► 3a				290,350.
b <i>Approved for future payment</i>				
Total ► 3b				

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
▼	

[illegible]

Schedule of Contributors

OMB No 1545-0047

2013

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

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

Name of the organization THE MORRIS & BESSIE ALTMAN FOUNDATION C/O PETER STERN	Employer identification number 03-0323120
--	--

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

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

☐ 4947(a)(1) nonexempt 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(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, 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 H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization **THE MORRIS & BESSIE ALTMAN FOUNDATION**
C/O PETER STERN

Employer identification number
03-0323120

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BERNICE STERN REVOCABLE TRUST GREENWICH, CT 06831	\$ 102,500.	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)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization **THE MORRIS & BESSIE ALTMAN FOUNDATION**
C/O PETER STERN

Employer identification number
03-0323120

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
---	----- ----- ----- -----	\$ -----	-----
(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
---	----- ----- ----- -----	\$ -----	-----

Name of organization **THE MORRIS & BESSIE ALTMAN FOUNDATION**
C/O PETER STERN

Employer identification number
03-0323120

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 the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ► \$ _____

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

FORM 990-PF - PART IV**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
469,882.		SEE ATTACHED STATEMENT A PROPERTY TYPE: SECURITIES 435,003.				P	VARIOUS 34,879.	VARIOUS
662,708.		SEE ATTACHED STATEMENT A PROPERTY TYPE: SECURITIES 412,857.				P	VARIOUS 249,851.	VARIOUS
TOTAL GAIN(LOSS)							<u>284,730.</u>	

ATTACHMENT 1

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
KEYBANK CHECKING	104.	104.
TOTAL	<u>104.</u>	<u>104.</u>

ATTACHMENT 2

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
DIVIDEND INCOME	41,780.	41,780.
CORPORATE BOND INTEREST	16,035.	16,035.
INTEREST INCOME	729.	729.
STERN FAMILY 1997 TRUST	92,317.	92,317.
TOTAL	<u>150,861.</u>	<u>150,861.</u>

ATTACHMENT 3

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
OFFIT CAPITAL ADVISORS	1,213.	1,213.
LITIGATION PROCEEDS	151.	151.
TOTALS	<u>1,364.</u>	<u>1,364.</u>

ATTACHMENT 4FORM 990PF, PART I - ACCOUNTING FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
ACCOUNTING FEES	6,406.	2,218.		4,188.
TOTALS	<u>6,406.</u>	<u>2,218.</u>		<u>4,188.</u>

ATTACHMENT 5FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
FOREIGN TAXES	1,028.	664.		
FEDERAL TAXES	10,363.			
TOTALS	11,391.	664.		

ATTACHMENT 6FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
BANK SERVICE CHARGES	131.			131.
COMPUTER & OFFICE EXPENSE	75.			75.
INVESTMENT FEES	22,652.	22,652.		
ADR FEES	268.	268.		
PORTFOLIO DEDUCTIONS	13.	13.		
OTHER EXPENSES	8.			
TOTALS	23,147.	22,933.		206.

FORM 990PF, PART II - CORPORATE STOCK

ATTACHMENT 7

DESCRIPTION

ENDING
BOOK VALUE

ENDING
FMV

SEE ATTACHED STATEMENT C

1,757,880.

2,764,468.

TOTALS

1,757,880.

2,764,468.

ATTACHMENT 8

FORM 990PF, PART II - CORPORATE BONDS

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
SEE ATTACHED STATEMENT D	185,762.	188,594.
TOTALS	<u>185,762.</u>	<u>188,594.</u>

FORM 990PF, PART II - OTHER INVESTMENTS

ATTACHMENT 9

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
OCA CREDIT OPPORTUNITIES		
OFFSHORE FUND LP	5,572.	8,924.
L.P. OCA GSO CAPITAL SOLUTIONS		
OVERSEAS FEEDER FUND II	11,995.	15,014.
NOTE - STERN FAMILY 1997 TRUST	1,552,339.	1,552,339.
TOTALS	<u>1,569,906.</u>	<u>1,576,277.</u>

LAND, BUILDINGS, EQUIPMENT NOT HELD FOR INVESTMENTATTACHMENT 10

ASSET DESCRIPTION	METHOD/ CLASS	FIXED ASSET DETAIL			ACCUMULATED DEPRECIATION DETAIL		
		BEGINNING BALANCE	ADDITIONS	DISPOSALS BALANCE	BEGINNING BALANCE	ADDITIONS DISPOSALS	ENDING BALANCE
PRINTER	M5	1,522.		1,522.	1,522.		1,522.
COMPUTER	M5	3,408.		3,408.	3,408.		3,408
COMPUTER	M5	1,361.		1,361.	1,361.		1,361.
COMPUTER	M5	2,473.		2,473.	2,473.		2,473.
COMPUTER	M5	3,048.		3,048.	3,048.		3,048
COMPUTER	M5	3,180.		3,180.	2,265.	366.	2,631.
TOTALS		<u>14,992.</u>		<u>14,992.</u>	<u>14,077.</u>		<u>14,443.</u>

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEESATTACHMENT 11

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>
-------------------------	---

MARJORIE STERN PO BOX 458 SHELBURNE, VT 05482	DIRECTOR
---	----------

ABBI STERN 415 9TH STREET, APT 53 BROOKLYN, NY 11215	DIRECTOR
--	----------

SARENA STERN PO BOX 458 SHELBURNE, VT 05482	DIRECTOR
---	----------

PETER STERN PO BOX 458 SHELBURNE, VT 05482	DIRECTOR
--	----------

ATTACHMENT 12FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

PETER STERN
PO BOX 458
SHELBURNE, VT 05482
802-985-9943

ATTACHMENT 13

990PF, PART XV - FORM AND CONTENTS OF SUBMITTED APPLICATIONS

ANY FORM IS ACCEPTABLE. INCLUDE ORGANIZATIONAL DETAILS AND PROPOSED
USE OF FUNDS.

**SCHEDULE D
(Form 1041)**

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T.

▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9 and 10

▶ Information about Schedule D and its separate instructions is at www.irs.gov/form1041

OMB No 1545-0092

2013

Name of estate or trust C/O PETER STERN	THE MORRIS & BESSIE ALTMAN FOUNDATION	Employer identification number 03-0323120
--	---------------------------------------	--

Note: Form 5227 filers need to complete **only** Parts I and II

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked	469,882.	435,003.		34,879.
4 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2012 Capital Loss Carryover Worksheet				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h) Enter here and on line 17, column (3) on the back ▶				7 34,879.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b				
8b Totals for all transactions reported on Form(s) 8949 with Box D checked				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked				
10 Totals for all transactions reported on Form(s) 8949 with Box F checked	662,708.	412,857.		249,851.
11 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts.				12
13 Capital gain distributions.				13
14 Gain from Form 4797, Part I.				14
15 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2012 Capital Loss Carryover Worksheet				15 ()
16 Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h) Enter here and on line 18a, column (3) on the back ▶				16 249,851.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041

Schedule D (Form 1041) 2013

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PAGE 36

Part III Summary of Parts I and II**Caution:** Read the instructions *before* completing this part.

		(1) Beneficiaries' (see instr)	(2) Estate's or trust's	(3) Total
17	Net short-term gain or (loss)	17		34,879.
18	Net long-term gain or (loss):			
a	Total for year	18a		249,851.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht)	18b		
c	28% rate gain	18c		
19	Total net gain or (loss). Combine lines 17 and 18a. ▶	19		284,730.

Note: If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 18a and 19, column (2), are net gains, go to Part V, and do not complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation

20	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of: a The loss on line 19, column (3) or b \$3,000	20	()
-----------	--	-----------	-----

Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if:

- Either line 18b, col (2) or line 18c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part **only** if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 18b, col (2) or line 18c, col. (2) is more than zero.

21	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34).	21		
22	Enter the smaller of line 18a or 19 in column (2) but not less than zero.	22		
23	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	23		
24	Add lines 22 and 23	24		
25	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0- . . . ▶	25		
26	Subtract line 25 from line 24. If zero or less, enter -0-	26		
27	Subtract line 26 from line 21. If zero or less, enter -0-	27		
28	Enter the smaller of the amount on line 21 or \$2,450	28		
29	Enter the smaller of the amount on line 27 or line 28	29		
30	Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0% ▶	30		
31	Enter the smaller of line 21 or line 26	31		
32	Subtract line 30 from line 26.	32		
33	Enter the smaller of line 21 or \$11,950.	33		
34	Add lines 27 and 30	34		
35	Subtract line 34 from line 33. If zero or less, enter -0-	35		
36	Enter the smaller of line 32 or line 35.	36		
37	Multiply line 36 by 15%. ▶	37		
38	Enter the amount from line 31	38		
39	Add lines 30 and 36	39		
40	Subtract line 39 from line 38. If zero or less, enter -0-	40		
41	Multiply line 40 by 20% ▶	41		
42	Figure the tax on the amount on line 27. Use the 2013 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041).	42		
43	Add lines 37, 41, and 42	43		
44	Figure the tax on the amount on line 21. Use the 2013 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041).	44		
45	Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36) ▶	45		

Schedule D (Form 1041) 2013

Sales and Other Dispositions of Capital Assets► Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.

► File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

THE MORRIS & BESSIE ALTMAN FOUNDATION

Social security number or taxpayer identification number
03-0323120

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box A, B, or C below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Part I Short-Term. Transactions involving capital assets you held one year or less are short-term. For long-term transactions, see page 2.

Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 1a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- ☐ (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
- ☐ (B) Short-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS
- ☒ (C) Short-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example 100 sh XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see Column (e) in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	SEE ATTACHED STATEMENT A	VARIOUS	VARIOUS	469,882.	435,003.			34,879.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked)►				469,882.	435,003.			34,879.

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

For Paperwork Reduction Act Notice, see your tax return instructions.

Name(s) shown on return (Name and SSN or taxpayer identification no. not required if shown on other side)

Social security number or taxpayer identification number

THE MORRIS & BESSIE ALTMAN FOUNDATION

03-0323120

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box D, E, or F below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Part II **Long-Term.** Transactions involving capital assets you held more than one year are long term. For short-term transactions, see page 1.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

☐ (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ (E) Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS

☒ (F) Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example 100 sh XYZ Co)	(b) Date acquired (Mo, day, yr)	(c) Date sold or disposed (Mo, day, yr)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see Column (e) in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	SEE ATTACHED STATEMENT A	VARIOUS	VARIOUS	662,708.	412,857.			249,851.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) ▶				662,708.	412,857.			249,851.

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

The Morris & Bessie Altman Foundation
 EIN 03-0323120
 Gain & Loss Schedule
 For Fiscal Year 07/01/2013 to 06/30/2014

	Quantity	Acquisition Date	Sale Date	Proceeds	Cost	Gain/Loss	Days Held	ST or LT
JULY								
MOTOROLA SOLUTIONS, INC	400	10/03/12	07/30/13	21,780	20,284	1,497	300	ST
MOTOROLA SOLUTIONS, INC	400	10/05/12	07/30/13	21,780	20,558	1,222	298	ST
MOTOROLA SOLUTIONS, INC	200	01/30/13	07/30/13	<u>10,890</u>	<u>11,774</u>	<u>(884)</u>	181	ST
				54,450	52,615	1,835		
AUGUST								
VISA INC	400	07/08/11	08/06/13	70,769	35,802	34,967	760	LT
VISA INC	50	01/13/12	08/06/13	<u>8,846</u>	<u>5,043</u>	<u>3,803</u>	571	LT
				79,615	40,845	38,770		
SEPTEMBER								
KINDER MORGAN MGMT LLC	184	08/01/01	09/13/13	14,009	2,833	11,176	4,426	LT
PLATINUM UNDERWRITERS FIN INC	25,000	06/02/09	09/30/13	<u>28,096</u>	<u>20,250</u>	<u>7,846</u>	1,581	LT
				42,104	23,083	19,022		
OCTOBER								
VORNADO REALTY TRUST	400	07/21/09	10/02/13	33,548	18,692	14,856	1,534	LT
UNITED PARCEL SVC INC	375	07/23/10	10/08/13	33,847	23,871	9,976	1,173	LT
UNITED PARCEL SVC INC	225	09/02/10	10/08/13	20,308	15,058	5,250	1,132	LT
UNITED PARCEL SVC INC	125	04/21/11	10/08/13	11,282	9,169	2,113	901	LT
AMERICAN INTERNATIONAL GROUP	50	02/12/13	10/28/13	2,601	1,989	612	258	ST
EXPRESS SCRIPTS HOLDING	50	05/15/13	10/28/13	<u>3,197</u>	<u>3,052</u>	<u>145</u>	166	ST
				104,783	71,831	32,952		
NOVEMBER								
RANGE RESOURCES CORP	500	05/08/13	11/18/13	37,371	37,148	223	194	ST
RANGE RESOURCES CORP	500	07/25/13	11/18/13	37,371	40,433	(3,062)	116	ST
BOEING CO	350	07/05/12	11/26/13	46,305	26,049	20,255	509	LT
EBAY	400	10/27/11	11/26/13	20,207	21,052	(844)	761	LT
EBAY	100	10/27/11	11/29/13	<u>4,898</u>	<u>5,263</u>	<u>(365)</u>	764	LT
				146,151	129,945	16,206		
DECEMBER								
25K CIT GROUP INC	25,000	03/13/12	12/02/13	26,950	25,250	1,700	629	LT
KINDER MORGAN MGMT LLC	1,170	08/01/01	12/10/13	86,283	18,966	67,317	4,514	LT
AMERICAN INTERNATIONAL GROUP	1,000	08/14/12	12/12/13	50,049	33,914	16,136	485	LT
AMERICAN INTERNATIONAL GROUP	87	09/11/12	12/12/13	4,354	2,884	1,470	457	LT
AMERICAN INTERNATIONAL GROUP	163	09/11/12	12/12/13	8,158	5,298	2,861	457	LT
AMERICAN INTERNATIONAL GROUP	1,200	02/12/13	12/12/13	<u>60,059</u>	<u>47,747</u>	<u>12,312</u>	303	ST
				235,854	134,058	101,796		
JANUARY								
GASLOG LTD	1,750	09/09/13	01/28/14	35,175	26,440	8,735	141	ST
GASLOG LTD	1,750	09/09/13	01/31/14	<u>36,749</u>	<u>26,440</u>	<u>10,309</u>	144	ST
				71,924	52,880	19,044		
FEBRUARY								
KANSAS CITY SOUTHERN	200	06/07/12	02/21/14	18,132	13,453	4,679	624	LT
KANSAS CITY SOUTHERN	50	11/08/11	02/21/14	<u>4,533</u>	<u>3,299</u>	<u>1,234</u>	836	LT
				22,665	16,752	5,914		

	Quantity	Acquisition Date	Sale Date	Proceeds	Cost	Gain/Loss	Days Held	ST or LT
MARCH								
\$50K REGAL CINEMAS	50,000	01/09/12	03/31/14	53,537	54,500	(964)	812	LT
BOEING CO	100	07/05/12	03/12/14	13,002	7,443	5,560	615	LT
GENERAL MOTORS COMPANY	2,000	11/14/13	03/14/14	<u>71,096</u>	<u>77,096</u>	<u>(6,000)</u>	120	ST
				137,635	139,038	(1,404)		
MAY								
EBAY INC	1,000	10/27/11	05/08/14	52,057	32,363	19,693	924	LT
JP MORGAN CHASE & CO	1,575	10/03/13	05/08/14	85,313	81,624	3,689	217	ST
STARWOOD WAYPOINT RESIDENTIAL TRUST	500	02/03/14	05/19/14	<u>13,612</u>	<u>14,420</u>	<u>(808)</u>	105	ST
				150,982	128,407	22,575		
JUNE								
PIONEER NATURAL RESOURCES	210	02/15/13	06/09/14	44,974	27,287	17,687	479	LT
PIONEER NATURAL RESOURCES	40	02/15/13	06/09/14	<u>8,565</u>	<u>5,120</u>	<u>3,445</u>	479	LT
				53,539	32,407	21,132		
CR BARD INC	225	08/29/13	06/09/14	<u>32,887</u>	<u>25,999</u>	<u>6,888</u>	284	ST
				32,887	25,999	6,888		
SHORT TERM				469,882	435,003	34,879		
LONG TERM				<u>662,708</u>	<u>412,857</u>	<u>249,851</u>		
TOTAL				1,132,590	847,860	284,730		

Depreciation and Amortization (Including Information on Listed Property)

OMB No 1545-0172

2013

Attachment
Sequence No 179Department of the Treasury
Internal Revenue Service (99)

▶ See separate instructions.

▶ Attach to your tax return.

Name(s) shown on return

THE MORRIS & BESSIE ALTMAN FOUNDATION

Identifying number

03-0323120

Business or activity to which this form relates

GENERAL DEPRECIATION

Part I Election To Expense Certain Property Under Section 179**Note:** If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	
4	Reduction in limitation Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property Enter the amount from line 29	7	
8	Total elected cost of section 179 property Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2012 Form 4562	10	
11	Business income limitation Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11	
12	Section 179 expense deduction Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2014 Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.) (See instructions.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2013	17	366.
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B - Assets Placed in Service During 2013 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27 5 yrs	MM	S/L	
i Nonresidential real property			39 yrs	MM	S/L	

Section C - Assets Placed in Service During 2013 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs		S/L	
c 40-year			40 yrs	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property Enter amount from line 28	21	
22	Total Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21 Enter here and on the appropriate lines of your return Partnerships and S corporations - see instructions	22	366.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V Listed Property (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement.)

Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete **only** 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

Section A - Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

24a Do you have evidence to support the business/investment use claimed? **Yes** ☒ **No** ☒ **24b** If "Yes," is the evidence written? **Yes** ☐ **No** ☒

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/Convention	(h) Depreciation deduction	(i) Elected section 179 cost
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see instructions) 25								
26 Property used more than 50% in a qualified business use:								
		%						
		%						
		%						
27 Property used 50% or less in a qualified business use:								
		%				S/L -		
		%				S/L -		
		%				S/L -		
28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1. 28								
29 Add amounts in column (i), line 26. Enter here and on line 7, page 1. 29								

Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle 1	(b) Vehicle 2	(c) Vehicle 3	(d) Vehicle 4	(e) Vehicle 5	(f) Vehicle 6
30 Total business/investment miles driven during the year (do not include commuting miles) . . .						
31 Total commuting miles driven during the year . . .						
32 Total other personal (noncommuting) miles driven						
33 Total miles driven during the year. Add lines 30 through 32						
34 Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No
35 Was the vehicle used primarily by a more than 5% owner or related person?						
36 Is another vehicle available for personal use?						

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons (see instructions).

	Yes	No
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use? (See instructions.)		

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.

Part VI Amortization

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2013 tax year (see instructions)					
43 Amortization of costs that began before your 2013 tax year 43					
44 Total. Add amounts in column (f). See the instructions for where to report. 44					

The Morris & Bessie Altman Foundation
 2012 Form 990-PF
 Park XV - Supplementary Information

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

Recipient	Relationship	Status	Purpose	Amount
Audubon Vermont 255 Sherman Hollow Road Huntington, VT 05462	N/A	Public	Operations	250
Burlington City Arts 149 Church Street Burlington, VT 05401	N/A	Public	Operations	750
Burlington Meals on Wheels Three Cathedral Square Burlington, VT 05401	N/A	Public	Operations	500
Campaign for Vermont 77 College St. #3B Burlington, VT 05401	N/A	Public	Operations	500
Champlain College 163 South Willard Street Burlington, VT 05401	N/A	Public	Operations	120,000
Champlain Valley Agency on Aging 76 Pearl Street Essex Junction, VT 05452	N/A	Public	Operations	1,000
Child Care Resource 181 Commerce Street Williston, VT 05495	N/A	Public	Operations	500
Chittenden Emergency Food Shelf 228 North Winooski Avenue Burlington, VT 05401	N/A	Public	Operations	2,500
Committee on Temporary Shelter P O. Box 1616 Burlington, VT 05402	N/A	Public	Operations	2,000
Community Health Center of Burlington 617 Riverside Avenue #200 Burlington, VT 05401-1601	N/A	Public	Operations	26,250
Dismas House 96 Buell Street Burlington, VT 05401	N/A	Public	Operations	250

The Morris & Bessie Altman Foundation
 2012 Form 990-PF
 Park XV - Supplementary Information

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

Recipient	Relationship	Status	Purpose	Amount
ECHO Museum 1 College Street Burlington, VT 05401	N/A	Public	Operations	500
Fleming Museum 61 Colchester Avenue Burlington, VT 05405	N/A	Public	Operations	1,000
Fletcher Allen Foundation 1 S Prospect St Burlington, VT 05401	N/A	Public	Operations	10,000
Flynn Theatre 153 Main Street Burlington, VT 05401	N/A	Public	Operations	750
Green Mountain Club 4711 Waterbury-Stowe Road Waterbury Center, VT 05677	N/A	Public	Operations	250
Helen Day Art Center 90 Pond Street PO BOX 411 Stowe, VT 05672	N/A	Public	Operations	500
Helping Hands Springfield, VT 05156	N/A	Public	Operations	750
Home Share Now 105 N Main Street Ste 103 Barre, VT 05641	N/A	Public	Operations	250
Howard Center for Human Services 208 Flynn Avenue, Suite 3J Burlington, VT 05401	N/A	Public	Operations	1,000
Humane Society of Chittenden County 142 Kindness Court South Burlington, VT 05403	N/A	Public	Operations	1,500
Hunger Free Vermont 38 Eastwood Drive #100 South Burlington, VT 05403	N/A	Public	Operations	750

The Morris & Bessie Altman Foundation
 2012 Form 990-PF
 Park XV - Supplementary Information

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

Recipient	Relationship	Status	Purpose	Amount
Hun School of Princeton 176 Edgerstoune Road Princeton, NJ 08540	N/A	Public	Operations	750
Institute for Sustainable Communities 535 Stone Cutters Way Montpelier, VT 05602	N/A	Public	Operations	500
Keeping Track 2209 Main Road Huntington, VT 05462	N/A	Public	Operations	250
Kenya Self Help Project 32 Thibault Pkwy Burlington, VT 05401	N/A	Public	Operations	750
King Street Youth Center P O Box 1615 87 King Street Burlington, VT 05402	N/A	Public	Operations	500
Lake Champlain Maritime Museum 4472 Basin Harbor Road Vergennes, VT 05491	N/A	Public	Operations	250
Lee Pesky Learning Center 3324 Elder Street Boise, ID 83705	N/A	Public	Operations	2,250
Lund Family Center 76 Glen Road Burlington, VT 05401	N/A	Public	Operations	950
Lyrice Theatre Company 55 Leroy Road Williston, VT 05495	N/A	Public	Operations	500
Maple Leaf Farm 10 Maple Leaf Road Underhill, VT 05489	N/A	Public	Operations	1,000
Mountain Lake PBS One Sesame Street Plattsburgh, NY 12901	N/A	Public	Operations	500

The Morris & Bessie Altman Foundation
 2012 Form 990-PF
 Park XV - Supplementary Information

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

Recipient	Relationship	Status	Purpose	Amount
North Country Public Radio St. Lawrence University 80 East Main Street Canton, NY 13617	N/A	Public	Operations	250
NYC SALT 214 W 29th St. New York, NY 10001	N/A	Public	Operations	500
Outreach for Earth Stewardship 1611 Harbor Road Shelburne, VT 05482	N/A	Public	Operations	1,000
Partners in Adventure 1394 Orchard Road Charlotte, VT 05445	N/A	Public	Operations	500
Pember Museum 33 West Main Street Granville, NY 12832	N/A	Public	Operations	250
Planned Parenthood of Northern New England 128 Lakeside Avenue, Suite 301 Burlington, VT 05401	N/A	Public	Operations	500
Prescott College 220 Grove Ave Prescott, AZ 86301	N/A	Public	Operations	2,500
Proctor Academy 204 Main St Andover, NH 03216	N/A	Public	Operations	2,000
Puppets in Education 294 North Winooski Avenue #125 Burlington, VT 05401	N/A	Public	Operations	500
Run Vermont One Main Street, Suite 304 Burlington, VT 05401	N/A	Public	Operations	250
Salvation Farms INC PO BOX 1174 Morrisville, VT 05661	N/A	Public	Operations	100

The Morris & Bessie Altman Foundation
 2012 Form 990-PF
 Park XV - Supplementary Information

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

Recipient	Relationship	Status	Purpose	Amount
Sara Holbrook Community Center 135 Allen Brook Lane Williston, VT 05495	N/A	Public	Operations	300
Shelburn Farms PO BOX 1174 Morrisville, VT 05661	N/A	Public	Operations	10,000
Shelburne Museum U.S Route 7 P O Box 10 Shelburne, VT 05482	N/A	Public	Operations	15,000
Sheldon Museum 1 Park Street Middlebury, VT 05753	N/A	Public	Operations	500
Spectrum Youth & Family Services 31 Elmwood Ave Burlington, VT 05401	N/A	Public	Operations	250
Stern Center for Language & Learning 183 Talcott Road, Suite 101 Williston, VT 05495	N/A	Public	Operations	32,500
Sun Valley Center for the Arts 191 5th St. E Ketchum, ID 83340	N/A	Public	Operations	500
Team Rubicon USA 300 North Continental Blvd , Suite 150 El Segundo, CA 90245	N/A	Public	Operations	500
The Carving Studio 636 Marble Street West Rutland, VT 05777	N/A	Public	Operations	500
The Minnesota Project 1885 University Avenue West Suite 315 St. Paul, MN 55104-3462	N/A	Public	Operations	500

The Morris & Bessie Altman Foundation
 2012 Form 990-PF
 Park XV - Supplementary Information

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

Recipient	Relationship	Status	Purpose	Amount
Tuck Annual Giving Dartmouth College 100 Tuck Hall Hanover, NH 03755	N/A	Public	Operations	5,000
United Way of Chittenden County 412 Farrell Street, Suite 200 South Burlington, Vt 05403	N/A	Public	Operations	750
University of Vermont College of Medicine Given Building E-100 89 Beaumont Avenue Burlington, VT 05401	N/A	Public	Operations	1,000
Upper Valley Arts c/o David Ferm PO BOX 322 Norwich, VT 05055	N/A	Public	Operations	500
VABVI 60 Kimball Avenue South Burlington, VT 05403	N/A	Public	Operations	500
Vermont Community Foundation 3 Court Street Middlebury, VT 05753	N/A	Public	Operations	2,500
Vermont Folklife Center 88 Main Street Middlebury, VT 05753	N/A	Public	Operations	500
Vermont Food Bank P.O. Box 254 South Barre, VT 05670	N/A	Public	Operations	10,000
Vermont Fresh Network 52 Bridge Street Richmond, VT 05477	N/A	Public	Operations	500
Vermont Public Radio 365 Troy Avenue Colchester, VT 05446	N/A	Public	Operations	5,500

The Morris & Bessie Altman Foundation
 2012 Form 990-PF
 Park XV - Supplementary Information

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

Recipient	Relationship	Status	Purpose	Amount
Vermont Stage Company 110 Main Street #101 Burlington, VT 05401-8451	N/A	Public	Operations	250
Vermont Symphony Orchestra 2 Church Street, Suite 3B Burlington, VT 05401	N/A	Public	Operations	500
Vermont Women's Fund 3 Court Street Middlebury, VT 05753	N/A	Public	Operations	500
Vermont Works for Women 32 Malletts Bay Ave Winooski, VT 05404	N/A	Public	Operations	500
Vermont Youth Conservation Corps 1949 East Main Street Richmond, VT 05477	N/A	Public	Operations	10,000
Vermont Youth Orchestra Association 223 Ethan Allen Ave Colchester, VT 05446	N/A	Public	Operations	500
Verry Merry Theater 119 Spruce Street Burlington, VT 05401	N/A	Public	Operations	250
VNA 1110 Prim Road Colchester, VT 05446	N/A	Public	Operations	1,000
VtDigger 97 State Street Montpelier, VT 05602	N/A	Public	Operations	1,000
Young Writers Project 12 North Street #8 Burlington, VT 05401	N/A	Public	Operations	250
Total				<u>290,350</u>

The Morris & Bessie Altman Foundation
EIN 03-0323120
2013 Form 990-PF Part II, Line 10b Detail - Corporate Stock

All Positions are listed at Cost

150 Amazon.com	\$ 38,508
1500 American Tower Corporation	39,807
400 Blackrock Inc	67,835
550 Boeing Co	40,439
1250 Borg Warner Automotive	72,452
2000 Brookfield Infrastructure	48,534
4500 Calpine Corporation	83,055
1000 Delphi Automotive	45,402
3941 Enbridge Energy Management	29,101
1200 Express Scripts	68,550
2500 Golub Cap BDC Inc	34,751
2000 Hannon Armstrong	24,855
1350 IAC Interactive Corp	88,299
1050 I H S Inc	117,586
1250 IMS Health Holdings	22,000
1250 Intuit	87,659
3750 ITC Holdings	69,138
750 Johnson & Johnson	60,486
450 Kansas City Southern	29,688
1250 Nextera Energy Inc	85,062
350 Pioneer Natural Resources	44,325
2250 QEP Resources	64,727
2750 Seadrill Partners LLC	60,719
1040 Seaspac Corporation	23,608
2500 Starwood Property Trust	36,322
1000 Targa Resources Corp	43,030
1500 Teekay Corp Marshall Island	44,187
2000 Teekay Offshore Partners LP	31,754
6675 Transalta Renewables Inc	64,930
1000 Tribune Company	74,894
600 United Rentals Inc	34,256
3800 Veresen Inc	54,088
1000 Verisk Analytics Inc	27,833

Total Corporate Stock	<u>\$ 1,757,880</u>
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The Morris & Bessie Altman Foundation
EIN 03-0323120
2013 Form 990-PF Part II, Line 10c Detail - Corporate Bonds

All Positions are listed at Cost

50000 Cit Group Inc	25,250
20000 Genesis Energy 5.625%	20,000
30000 Genesis Energy 5 625%	30,450
50000 Teekay Corp	55,062
50000 Genesis Energy 7.875%	55,000
Total Corporate Bonds	<u>\$ 185,762</u>

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

Department of the Treasury
Internal Revenue Service

File a separate application for each return.
Information about Form 8868 and its instructions is at www.irs.gov/form8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
 - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions THE MORRIS & BESSIE ALTMAN FOUNDATION C/O PETER STERN	Employer identification number (EIN) or 03-0323120
	Number, street, and room or suite no. If a P O box, see instructions PO BOX 458	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions SHELBURNE, VT 05482	

Enter the Return code for the return that this application is for (file a separate application for each return) **0** **4**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of **PETER STERN, PO BOX 458 SHELBURNE, VT 05482**

Telephone No. **802 985-9943**

FAX No.

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **02/15, 2015**, to file the exempt organization return for the organization named above. The extension is for the organization's return for.

☐ calendar year 20 or

☒ tax year beginning **07/01, 2013**, and ending **06/30, 2014**.

2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a \$ 10,887.00
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b \$ 6212.00
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c \$ 4675.00

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

DANAHER ATTIG & PLANTE PC
PO BOX 2166
SOUTH BURLINGTON, VT 05407