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990-PF

### **Return of Private Foundation**

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

OMB No 1545-0052 2013

		the Treasury The Service Information about Form 990-PF and its ser					1 to Public Inspection
_		· · · · · · · · · · · · · · · · · · ·	1/2013		ending	6/30/2014	
	me of for			,		identification numbe	
TH	IE DAL	E KUTNICK & LAURA GORDON KUTNIC FOUNDATIO	N				
		d street (or P O box number if mail is not delivered to street address)		v/surte		06-1469212	
		( 1501, NJ2-130-03-31			B Telephone	number (see instruction	ons)
	y or towr		ZIP code				
	NNINC		08534-15	01		609-274-683	4
Fo	reign cou	untry name Foreign province/state/county	Foreign post	al code	C If exempti	on application is pendi	ng, check here 🕨 🔃
_	Charl				<b> </b>		_
G	Check		of a former public	charity	D 1. Foreigr	organizations, check	here ►
		Final return Amended ret			_	organizations meeting	
-	Charl	Address change Name change			ł	nere and attach compu	
Н		k type of organization: X Section 501(c)(3) exempt pri		. 4		oundation status was t 7(b)(1)(A), check here	
<u> </u>		on 4947(a)(1) nonexempt charitable trust  Other taxa					
1		narket value of all assets at J Accounting method	IXI Cash ☐ A	ccrual		dation is in a 60-month	
		f year (from Part II, col (c), ☐ Other (specify) 6) ► \$ 6,926,673 (Part I, column (d) must be	on each bose l		under sec	tion 507(b)(1)(B), chec	k here ►
			On Cash basis )	Γ	<u> </u>		(d) Disbursements
	art I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily	(a) Revenue and	(b) Ne	t investment	(c) Adjusted net	for charitable
		equal the amounts in column (a) (see instructions) )	expenses per books	) i	ncome	ıncome	purposes
_	1	Contributions, gifts, grants, etc., received (attach schedule)		<del></del>			(cash basis only)
	l .	<u>_</u> -	1,388,275	<del>'</del> `			
	2	Check ►☐ if the foundation is not required to attach Sch B Interest on savings and temporary cash investments	· · · · · · · · · · · · · · · · · · ·			<del> </del>	
	4	Dividends and interest from securities	125,298	<u> </u>	120,785		,
	5a	Gross rents .	120,200		120,100		۶ .
	b	Net rental income or (loss)		٤			
a	6a	Net gain or (loss) from sale of assets not on line 10	401,200				
ğ	Ь	Gross sales price for all assets on line 6a 1,167,492	•		*****		
Revenue	7	Capital gain net income (from Part IV, line 2)			401,200		
æ	8	Net short-term capital gain					
_	9	Income modifications					
	10a	Gross sales less returns and allowances				····	
	þ	Less Cost of goods sold .		ļ		· · · · · · · · · · · · · · · · · · ·	<del></del>
	l c	Gross profit or (loss) (attach schedule)		ļ		<del></del>	, .
	11	Other income (attach schedule)	-5,212			<del></del>	<u> </u>
`	12	Total. Add lines 1 through 11	1,909,561		521,985	0	
Ş	13	Compensation of officers, directors, trustees, etc		<b>-</b>			<del></del>
penses	14	Other employee salaries and wages					<del></del>
ě	15 16a	Pension plans, employee benefits Legal fees (attach schedule)				· ··· · · ·	
Ē	b	Accounting tage (attach schadule)	2,500				2,500
ق	C	Accounting tees (attach schedule) Other professional fees tattach schedule)	42,531		25,518		17,012
Administrative	17	Interest	42,001	<del>                                     </del>	20,010		11,012
֝֟֝֝֟֝֝ <u>֚֚֚֚֚֚</u>	18	Interest Taxes (allections) (see instructions)	10,580	<u> </u>	1,882		
Ţ,	19	Depreciation (attach schedule) and depletion		1			
Ξ	20	O - Leave - System -					
. P	21	Travel Conferences and meetings					
and	22	Printing and publications					
ā	23	Other expenses (attach schedule)					
Operating	24	Total operating and administrative expenses.					
ati		Add lines 13 through 23	55,611		27,400	0	
per	25	Contributions, gifts, grants paid	285,000	<u> </u>			285,000
<u>ō</u>		Total expenses and disbursements. Add lines 24 and 2	340,611	ļ	27,400	0	304,512
	27	Subtract line 26 from line 12	<u></u>				1
	a	Excess of revenue over expenses and disbursements	1,568,950	ļ		<del> </del>	<u> </u>
	b	Net investment income (if negative, enter -0-)		<u> </u>	494,585		
	С	Adjusted net income (if negative, enter -0-)		I		0	I

For Paperwork Reduction Act Notice, see instructions.

Attached schedules and amounts in the description column

should be for end-of-year amounts only (See instructions)

Form 990-PF (2013) THE DALE KUTNICK & LAURA GORDON KUTNIC FOUNDATION

Accounts receivable

Less: allowance for doubtful accounts

Less allowance for doubtful accounts

Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).

Other notes and loans receivable (attach schedule)

Investments—U S and state government obligations (attach schedule)

Land, buildings, and equipment basis

Total assets (to be completed by all filers—see the

Other assets (describe

Loans from officers, directors, trustees, and other disqualified persons

Mortgages and other notes payable (attach schedule)

and complete lines 24 through 26 and lines 30 and 31.

Foundations that do not follow SFAS 117, check here ▶ 🛛

Paid-in or capital surplus, or land, bldg, and equipment fund

Retained earnings, accumulated income, endowment, or other funds

Total net assets or fund balances (see instructions)

Total liabilities and net assets/fund balances (see

Foundations that follow SFAS 117, check here

Investments—land, buildings, and equipment basis

Less accumulated depreciation (attach schedule)

Part II

2

3

5

6

7

8

9

10a

С 11

12

13

14

15 16

17

18

19

20

21

22

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24

25

26

27

28

29

30

31

Net Assets or Fund Balances

Assets

**Balance Sheets** 

Cash—non-interest-bearing . . .

Savings and temporary cash investments

Pledges receivable ▶

Grants receivable . . . . .

Less allowance for doubtful accounts

Investments—mortgage loans

Investments—other (attach schedule)

instructions Also, see page 1, item I)

Grants payable .

Deferred revenue

Unrestricted . .

instructions).

Temporarily restricted

Permanently restricted

Other liabilities (describe

Accounts payable and accrued expenses

Total liabilities (add lines 17 through 22)

and complete lines 27 through 31.

Capital stock, trust principal, or current funds

Less accumulated depreciation (attach schedule)

Prepaid expenses and deferred charges

Investments—corporate stock (attach schedule)

Investments—corporate bonds (attach schedule)

Inventories for sale or use

06-1469212 Page 2 End of year Beginning of year (a) Book Value (b) Book Value (c) Fair Market Value 1.952 3.968 3,968 1,225,559 499,244 499,244 114,023 113.966 127,136 2,056,878 2,778,387 4.196.477 394.255 823,000 842.571 659,427 1,098,287 1,257,277 4,452,094 5.316,852 6,926,673 4,452,094 5,316,852 4,452,094 5,316,852 4.452.094 5.316.852

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	4,452,094
2 Enter amount from Part I, line 27a	2	1,568,950
3 Other increases not included in line 2 (itemize) ▶ Purchase of Accrued Interest c/o from PY	3	106
4 Add lines 1, 2, and 3	4	6,021,150
5 Decreases not included in line 2 (itemize) ► See Attached Statement	5	704,298
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	5,316,852

▶ □

Part VI instructions.

		E RUTNICK & LAURA GURDON	KUTNIC FUU	NUATION		00-	1409212	Page 3
Part	V Capital Gains and	Losses for Tax on Investme	nt Income					
		ne kind(s) of property sold (e.g., real estate, use, or common stock, 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation		te acquired , day, yr )	(d) Date s (mo , day,	
1a	See Attached Statement			o sondion	-			
	See Attached Statement							
	See Attached Statement							
ď	See Attached Statement							
e	See Attached Statement		-					
	(e) Gross sales price	(f) Depreciation allowed (or allowable)		r other basis ense of sale		• •	n or (loss) n minus (g)	
								0
b								0
С								0
d								0
е								0
	Complete only for assets sh	nowing gain in column (h) and owned b	by the foundation	n on 12/31/69		(I) Gains (Col	(h) gain minus	
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69		ss of col (i) (j), if any	(	col (k), but not	less than -0-) o	
а								0
b								0
с								0
d	<del></del>							0
е_			· <u></u> -					0
2	Capital gain net income o		lso enter in Pa enter -0- in Pa		2		4	01,200
3		n or (loss) as defined in sections 1						
	=	, line 8, column (c) (see instruction	ns) If (loss), er	nter-0-ın 🚶				
	Part I, line 8 .	·			3			0
Part	V Qualification Und	ler Section 4940(e) for Reduc	<u>ed Tax on N</u>	<u>let Investment</u>	<u>Incom</u>	e		
Was t		ve this part blank section 4942 tax on the distributa qualify under section 4940(e) Do			ase per	ıod?	☐ Yes	∑ No
1	Enter the appropriate amo	ount in each column for each year,	see the instru	ctions before mal	king an	y entries		
	(a)	(b)	1	(c)		_	(d)	
Cal	Base period years endar year (or tax year beginning in	Adjusted qualifying distributions	Net value o	of nonchantable-use a	ssets		tribution ratio divided by col (e	c))
	2012	201,	769	3,932	2,664		0 (	051306
	2011	124,	115	3,376	3,274		0	036761
	2010	97,	833	2,789	9,412		0	035073
	2009	132	421	2,120	),957		0.0	062435
	2008	118,	690	1,92	1,505		0	061769
2	Total of line 1, column (d)	) .				2	0 :	247 <u>344</u>
3		for the 5-year base penod—divide dation has been in existence if les		ne 2 by 5, or by th 	ie	3	0	049469
4	Enter the net value of nor	nchantable-use assets for 2013 fro	m Part X, line	5 .		4	5,7	'32 <u>,211</u>
5	Multiply line 4 by line 3				L	5	2	83,567
6	Enter 1% of net investme	nt income (1% of Part I, line 27b)			. ]_	6		4,946
7	Add lines 5 and 6					7	2	<u> 88,513</u>
8		ons from Part XII, line 4 . ater than line 7. check the box in P		and complete the	ا	8 Ising a 1%		304,512
	THE WAY OF THE PARTY OF THE PAR	ace area made to discontile bus iii F	LILL VI HILE III	and complete me	LUGILL			- 4110

THE DALE KUTNICK & LAURA GORDON KUTNIC FOUNDATION

Form 990-PF (2013)

Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions) Part VI 1a 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) b Domestic foundations that meet the section 4940(e) requirements in Part V, check 1 4,946 here ▶ 🛛 and enter 1% of Part I, line 27b 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-) Add lines 1 and 2 . . . 3 3 4.946 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) 4 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-5 5 4.946 6 Credits/Payments 2013 estimated tax payments and 2012 overpayment credited to 2013 6a b Exempt foreign organizations—tax withheld at source 6b С Tax paid with application for extension of time to file (Form 8868) 6c d Backup withholding erroneously withheld . . 6d 7 Total credits and payments Add lines 6a through 6d . 7 8,890 8 Enter any penalty for underpayment of estimated tax. Check here I 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 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 3.944 Enter the amount of line 10 to be Credited to 2014 estimated tax ▶ 3,944 Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it No Yes participate or intervene in any political campaign? . . . 1a Χ b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 1b Х 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 Χ c Did the foundation file Form 1120-POL for this year? 1c 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. ▶\$ Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 Х If "Yes," attach a detailed description of the activities Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles 3 of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 3 Χ 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? Х 4a **b** If "Yes," has it filed a tax return on Form 990-T for this year? N/A 4b X Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 If "Yes," attach the statement required by General Instruction T 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either By language in the governing instrument, or By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . . . Х 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 Х 7 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 Х 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 Х Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10

06-1469212

Page 4

Form 990	-PF (2013) THE DALE KUTNICK & LAURA GORDON KUTNIC FOUNDATION 06-146	9212	F	age 5
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			
r	meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	_11_		<u> </u>
	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified			
ſ	person had advisory privileges? If "Yes," attach statement (see instructions)	12		<u> </u>
13 [	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Χ	<u> </u>
	Website address ► N/A			
	The books are in care of ► MLTC, A DIVISION OF BANK OF AMERICA, N.A. Telephone no ► 609-274			
	Located at ► 1300 MERRILL LYNCH DRIVE PENNINGTON NJ ZIP+4 ► 08534-1	<u>501</u>		
	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			<del></del>
	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority	مدا	Yes	No
	over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶	1		
	VII-B Statements Regarding Activities for Which Form 4720 May Be Required	<u> </u>		L
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
	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? Yes			
(	(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?			1
(	(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 )			
	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in			l
	Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here	1b	N/A	<del></del>
	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that	4-		- <del></del> -
	were not corrected before the first day of the tax year beginning in 2013? Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private	1c		X ,
	operating foundation defined in section 4942(j)(3) or 4942(j)(5)).			
	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and			
	6e. Part XIII) for tax year(s) beginning before 2013?			1
	If "Yes," list the years  20 , 20 , 20 , 20	1		1
	Are there any years listed in 2a for which the foundation is <b>not</b> 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	N/A	
c I	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
1	▶ 20 <sub></sub> , 20 <sub></sub> , 20 <sub></sub>	ļ		ļ
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise			
7	at any time during the year?			1 1
	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		<u> </u>	<b> </b>
	foundation had excess business holdings in 2013 )	3b	N/A	<del>  </del>
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	<u> </u>	X
	Did the foundation make any investment in a pnor 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	ļ	- <u>-</u> -

Form 99	90-PF (2013)	THE DALE KUTNICK & LAURA	GORD	ON KUTNIC	FOUN	DATION	_		06-14	69212	P	age 6
Pari	VII-B	Statements Regarding Activities for	or Wh	ich Form 47	'20 Ma	y Be Req	uired (	continue	d)			
5a		e year did the foundation pay or incur an on propaganda, or otherwise attempt to			(sectio	n 4945(e))	?	Yes	<b>⊠</b> No			
	dırecti	nce the outcome of any specific public el ly or indirectly, any voter registration drivi de a grant to an individual for travel, stud	e? .	•			on, 	☐ Yes ☐ Yes	X No X No			
		de a grant to an organization other than a n 509(a)(1), (2), or (3), or section 4940(d				on describi	ed in	☐ Yes	⊠ No			
		de for any purpose other than religious, c ses. or for the prevention of cruelty to ch			literary	, or educat	ional	☐ Yes	⊠ No			
b		swer is "Yes" to 5a(1)–(5), did <b>any</b> of the ons section 53 4945 or in a current notice							bed in	5b	N/A	
c	If the ans because	tions relying on a current notice regardin wer is "Yes" to question 5a(4), does the it maintained expenditure responsibility fi	founda or the c	tion claim ex grant? .	emptior		ax	Yes	► □ □ No			
6a	Did the fo	attach the statement required by Regulat oundation, during the year, receive any fu onal benefit contract?				o pay prem	iums	Yes	X No			
b		oundation, during the year, pay premiums o 6b, file Form 8870	s, direc	tly or indirect	ly, on a	personal b	enefit o	contract?		6b		X
b	At any time If "Yes," o	e during the tax year, was the foundation a pa did the foundation receive any proceeds	or have	any net inco	me atti	ributable to	the tra		<u> </u>	7b	N/A	
Par		nformation About Officers, Directond Contractors	ors, Tr	ustees, Fo	undati	on Manaç	gers, F	lighly Pa	aid Em	ploye	es,	
_1	List all o	fficers, directors, trustees, foundation										
		(a) Name and address	hou	e, and average irs per week ted to position	(lf ı	mpensation not paid, nter -0-)	emple	Contribution ovee benefit erred compe	plans	(e) Expe	ense ac allowan	
	Kutnick ierman Tur	npike Redding , CT 06896	Secret	ary 2 00								
	Gordon K		Presid				İ					
23 Sh	erman Tur	npike Redding , CT 06896		6 00		<del></del>						
2	Compen	sation of five highest-paid employees	(other	than those	include	ed on line	1—see	instructi	ons). If	none,	enter	•
	(a) Name an	nd address of each employee paid more than \$50,000	0	(b) Title, and a hours per v devoted to p	veek	(c) Compe	nsation	(d) Contrib employee plans and compen	benefit deferred	(e) Expe	ense ac allowan	
NON												
Total	number of	f other employees paid over \$50,000 .	<u>.</u>	<u> </u>	•		·		F	orm 99	0-PF	0 (2013)

Form	990-PF (2013) THE DALE KUTNICK & LAURA GORDON KUTNIC FOUNDATION 06-146	39212 Page <b>7</b>
Pa	Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Emand Contractors (continued)	ployees,
3	Five highest-paid independent contractors for professional services (see instructions). If none, enter "N	IONE "
<u> </u>	(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NO	NE NE	(c) Compensation
130	<u>YE.</u>	
Tot	al number of others receiving over \$50,000 for professional services	
P	art IX-A Summary of Direct Charitable Activities	
	st the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of ganizations and other beneficianes served, conferences convened, research papers produced, etc.	Expenses
1	NONE	
2		_
3		
4		
	••••••	
P	art IX-B Summary of Program-Related Investments (see instructions)	
	escribe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	NONE	
2		
A	l other program-related investments. See instructions	
3	· ·	
•		
<del></del>	al Addition 4 than at 2	
101	al. Add lines 1 through 3	0

	100 DALE RUTNICK & LAURA GURDON RUTNIC FOUNDATION	00-1469212	
°Part	X Minimum Investment Return (All domestic foundations must complete this part. Foreign see instructions)	foundations	5,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes		
а	Average monthly fair market value of securities	1a	_4,733,34 <u>9</u>
þ	Average of monthly cash balances	1b	_1,086,15 <u>5</u>
С	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	<u>5,819,504</u>
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	5,819,50 <u>4</u>
4	Cash deemed held for charitable activities. Enter 1 ½ % of line 3 (for greater amount, see		
	instructions)	4	87,293
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	<u>5,732,211</u>
_6	Minimum investment return. Enter 5% of line 5	6	286,611
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	286,611
2a	Tax on investment income for 2013 from Part VI, line 5		
b	Income tax for 2013 (This does not include the tax from Part VI) . 2b		
С	Add lines 2a and 2b	2c	4,946
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	281,665
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	281,665
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	281,665
Pari	XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	24	
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	304,512
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	304,512
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	4,946
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	299,566
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating w	hether the four	
	qualifies for the section 4940(e) reduction of tax in those years.		

d Excess from 2012 .
e Excess from 2013 .

THE DALE KUTNICK & LAURA GORDON KUTNIC FOUNDATION Form 990-PF (2013) 06-1469212 Page 9 Undistributed Income (see instructions) Part XIII (a) Corpus Distributable amount for 2013 from Part XI. Years prior to 2012 2012 2013 281,665 2 Undistributed income, if any, as of the end of 2013 a Enter amount for 2012 only 96,838 **b** Total for prior years: 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 ▶ \$ 304,512 a Applied to 2012, but not more than line 2a 96,838 **b** Applied to undistributed income of prior years (Election required—see instructions) . . c Treated as distributions out of corpus (Election required-see instructions) . 207,674 d Applied to 2013 distributable amount 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 f Undistributed income for 2013 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014 73,991 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 . . .

Part XV  Private Operating Foundations (see instructions and Part VII-A, question 9)		90-PF (2013) THE DALE KUTNICK	<u>&amp; LAURA GORD</u>	ON KUTNIC FOUN	NDATION	06-146	69212 Page <b>10</b>
foundation, and the ruling is effective for 2013, enter the date of the ruling.  ○ Check box to indicate whether the foundation is a private operating foundation described in section	Part						N/A
b Check box to indicate whether the foundation is a private operating foundation described in section   4942(I)(5) or   4942(I)(6)   2012   4942(I)(6)   4942(I)(	1a	If the foundation has received a ruling of	or determination	etter that it is a priv	vate operating		
2a Enter the lesser of the adjusted net income from Part of the minimum rivestment return from Part X for each year histed b 26% of line 2a for sided b 26% of line 2a for sided b 26% of line 2a for sided b 26% of line 2a for years itsed b 26% of line 2a for year listed b 26% of year							
income from Part I or the minimum newstiment return from Part X for each year listed and year listed year listed and year list			dation is a privat	e operating founda	tion described in s	ection 🔲 4942(j)	(3) or 4942(j)(5)
mivestment return from Part X for each vera Isted 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	2a	Enter the lesser of the adjusted net	Tax year		Pnor 3 years		(a) Total
each year listed b 85% of line 2a c Qualifying distributions from Part XII, line 4 for each year listed d Amounts included in line 2 not used directly for active conduct of exempt activities Subtract line 24 from line 22 Complete 3a, b, or for the alternative test enter dupon a "Assets" alternative test—enter (1) Value of all sestes. (2) Value of assets qualifying under section 4942(I)(30(B)(b)) b "Endowment" alternative test—enter (1) Value of assets qualifying under section 4942(I)(30(B)(b)) c "Endowment" alternative lest—enter (1) Totale of all sestes (1) Value of assets qualifying under section 4942(I)(30(B)(b)) c "Complete 3a, b, or for the alternative 4942(I)(30(B)(b)) b "Endowment" alternative test—enter (1) Totale of all sestes (1) Value of assets qualifying under section 4942(I)(30(B)(b)) c of internative test—enter (1) Totale support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(I2)(B)), or royaltes) (3) Ligrest amount of support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(I2)(B)), or royaltes) (3) Ligrest amount of support from an exempt organization as provided in section 4942(I)(3(B)(m)  1 Information Regarding Foundation Managers: 1 List any managers of the foundation who have contributed more than \$5,000 (See section 507(d)(2))  Dale Kutnick.  2 Information Regarding 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 in how accontributed more than \$5,000 (See section 507(d)(2))  a The name, address, and telephone number or e-mail address 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			(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
c Qualifying distributions from Part XII, line 4 for each year listed d Amounts included in line 2 not used directly for active conduct of exempt activities Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					<u></u>		0
In lart Agriculture of the Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)  Part XV  Support from general public and seems 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 \$07(4)(2))  Dale Kutnick  Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:  Check here P \( \frac{1}{2} \) If the foundation should be submitted and information and materials they should include  c Any submission deadlines.  d Any restrictions or imministrations on awards, such as by geographical areas, chantable fields, kinds of institutions, or other	b	85% of line 2a				_	0
In lart Agriculture of the Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)  Part XV  Support from general public and seems 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 \$07(4)(2))  Dale Kutnick  Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:  Check here P \( \frac{1}{2} \) If the foundation should be submitted and information and materials they should include  c Any submission deadlines.  d Any restrictions or imministrations on awards, such as by geographical areas, chantable fields, kinds of institutions, or other	С	Qualifying distributions from Part XII,					
o Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c							0
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	d	Amounts included in line 2c not used directly					
for active conduct of exempt activities Subtract line 2d from line 2c  Complete 3a, b, or c for the alternative test relied upon a "Assets" alternative test relied upon a "Assets" alternative test—enter (1) Value of all assets (2) Value of all assets (2) Value of all assets (3) Value of assets qualifying under section 4942(i)(3)(2)(0)  Endowment" alternative test—enter of the section of the s		for active conduct of exempt activities					0
Subtract line 2d from line 2c  3	е	Qualifying distributions made directly					
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 all assets (2) Value of assets qualifying under section 4942(N(3)(B)(i)) 0 b "Endowment" alternative test-enter 23 of minimum investment return shown in Part X, line 6 for each year listed 0 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(N(3)(B)(iii)) (3) Largest amount of support from an exempt organization of an exempt organization (4) Gross investment income 0 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))  Dale Kutnick  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 > [X] if the foundation only makes contributions to preselected chantable 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  b The form in which applications should be submitted and information and materials they should include		for active conduct of exempt activities					
a "Assets" alternative test—enter (1) Value of all assets . (2) Value of assets qualifying under section 4942(()3(8)()).  b "Endowment" alternative test—enter 1/3 of minimum investment return shown in Part X, line 6 for each year listed .  c "Support" alternative test—enter of the state of		Subtract line 2d from line 2c					0
a "Assets" alternative test—enter (1) Value of all assets (2) Value of all assets (2) Value of assets qualifying under section 4942(1/3)(B)(1)  b" Endowmen" 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 royalities) (2) Support from general public organizations as provided in section 4942(1/3)(B)(iii) (3) Largest amount of support from an exempt organization as provided in section 4942(1/3)(B)(iii)  (3) Largest amount of support from an exempt organization  an exempt organization  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))  Dale Kulmok  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  Check here > Xi first 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  The name, address, and telephone number or e-mail address 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, chantable fields, kinds of institutions, or other	3	Complete 3a, b, or c for the				<u>"</u>	
(1) Value of all assets (2) Value of assets qualifying under section 4942(I)(3)(E)(I)		alternative test relied upon		1		}	
(2) Value of assets qualifying under section 494(1)(3)(B)(1).  b 'Endowment' alternative test—enter 2/3 of minimum investment return shown in Parl 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 494(2)(3)(B)(iii)  (3) Largest amount of support from an exempt organization (2) (3)(3)(3)(3)(3)(3)(3)(3)(3)(3)(3)(3)(3)(	а	"Assets" alternative test—enter					
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(3) Largest amount of support from an exempt organization (4) Gross investment income . 0  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))  Dale Kutnick  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 > X 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  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, chantable fields, kinds of institutions, or other							
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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					İ		
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))  Dale Kutnick  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  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, chantable fields, kinds of institutions, or other				<u> </u>	ļ		
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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		The name address and telephone nu	mher or e-mail ac	Idrass of the perso	n to whom applica	tions should be add	dressed
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Part XV Supplementary Information (continued)

Form 990-PF (2013)

THE DALE KUTNICK & LAURA GORDON KUTNIC FOUNDATION

06-1469212

Page 11

3 Grants and Contributions Paid During the Year or Approved for Future Payment						
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or	Amount		
Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution			
a Paid during the year See Attached Statement	or substantial contributor					
Total b Approved for future payment	<u> </u>	<u> </u>	▶ 3a	285,000		
NONE						
Total			b 3b	0		

THE DALE KUTNICK & LAURA GORDON KUTNIC FOUNDATION

06-1469212 Page **12** 

L C.	rt XVI-A Analysis of Income-Producing Ac	tivities				
	er gross amounts unless otherwise indicated		isiness income	Excluded by sect	on 512, 513, or 514	(-)
1	Program service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions)
	a					
	b					
	С	-				
	d					
	e					
	f					
	g Fees and contracts from government agencies	-				
2						
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	125,298	
5	Net rental income or (loss) from real estate			14	120,290	1
3		<del></del>	/ *	,	<u>`~</u>	
	a Debt-financed property		ļ			
_	b Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			18	401,200	
9	Net income or (loss) from special events .					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a Income from Partnership K-1	-			-5,212	
	b					
	C					
	d					
	e					
		18	. 0	`` <b>`</b>	521,286	
	Total. Add line 12, columns (b), (d), and (e)				13	521,286
	e worksheet in line 13 instructions to verify calculation					
Pa	rt XVI-B Relationship of Activities to the A	ccomplishm				
Pal Lin	rt XVI-B Relationship of Activities to the A le No.  Explain below how each activity for which incon accomplishment of the foundation's exempt pur	ccomplishm	column (e) of Part	XVI-A contributed		
Pal Lin	rt XVI-B Relationship of Activities to the A ie No. Explain below how each activity for which incon	ccomplishm	column (e) of Part	XVI-A contributed		
Pal Lin	rt XVI-B Relationship of Activities to the A le No.  Explain below how each activity for which incon accomplishment of the foundation's exempt pur	ccomplishm	column (e) of Part	XVI-A contributed		
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Pal Lin	rt XVI-B Relationship of Activities to the A le No.  Explain below how each activity for which incon accomplishment of the foundation's exempt pur	ccomplishm	column (e) of Part	XVI-A contributed		
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Pai Lin	rt XVI-B Relationship of Activities to the A le No.  Explain below how each activity for which incon accomplishment of the foundation's exempt pur	ccomplishm	column (e) of Part	XVI-A contributed		

Firm's address • 600 GRANT STREET, PITTSBURGH, PA 15219

Use Only

Form 990-PF (2013) THE DALE KUTNICK & LAURA GORDON KUTNIC FOUNDATION 06-1469212 Page 13 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Did the organization directly or indirectly engage in any of the following with any other organization described Yes No 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 1a(1) (2) Other assets 1a(2) **b** Other transactions: (1) Sales of assets to a noncharitable exempt organization 1b(1) (2) Purchases of assets from a noncharitable exempt organization 1b(2) (3) Rental of facilities, equipment, or other assets 1b(3) (4) Reimbursement arrangements 1b(4) (5) Loans or loan guarantees . 1b(5) (6) Performance of services or membership or fundraising solicitations 1b(6) 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 (a) Line no (b) Amount involved (c) Name of nonchantable exempt organization (d) Description of transfers, transactions, and sharing arrangements Not Applicable 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 turn, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true yer) is based on all information of which preparer has any knowledge Sign May the IRS discuss this return with the preparer shown below Here (see instructions)? XYes No Preparer's signature Print/Type preparer's name Date PTIN Check X if Paid self-employed P00364310 DONALD J ROMAN 11/3/2014 Preparer ► PricewaterhouseCoopers, LLP

Form 990-PF (2013)

Firm's EIN ► 13-4008324

412-355-6000

Phone no

Schedule B

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

**Schedule of Contributors** 

OMB No. 1545-0047

Department of the Treasury

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. Internal Revenue Service Name of the organization **Employer** identification number

THE DALE KUTNICK & LAURA GORDON KUTNIC FOUNDATION 06-1469212 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 X 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 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)

Foreign State or Province
Foreign Country

(b) Name, address, and ZIP + 4

Foreign State or Province
Foreign Country

(a)

No.

Schedule B (Form 990, 990-EZ, or 990-PF) (2013) Page 2 Name of organization Employer identification number THE DALE KUTNICK & LAURA GORDON KUTNIC FOUNDATION 06-1469212 Contributors (see instructions). Use duplicate copies of Part I if additional space is needed (a) (d) (c) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Mr and Mrs Dale Kutnick ...1... Person 23 Sherman Pike **Payroll** Redding CT 06896 Noncash \$ 888,275 Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (b) (a) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Mr and Mrs Dale Kutnick \_\_2\_\_ Person l x l 23 Sherman Pike **Payroll** Redding CT 06896 Noncash Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (b) (a) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Person **Payroll** Noncash Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (a) (b) (c) (d) Name, address, and ZIP + 4 **Total contributions** No. Type of contribution Person **Payroll** Noncash Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (a) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Person **Payroll** 

	Noncash (Complete Part II for noncash contributions )
(c) Total contributions	(d) Type of contribution
	Person Payroll Noncash (Complete Part II for noncash contributions)
Schedule E	6 (Form 990, 990-EZ, or 990-PF) (2013

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

Page 3

Name of or THE DALE	ganization  KUTNICK & LAURA GORDON KUTNIC FOUNDATION		Employer identification number 06-1469212			
Part II	Noncash Property (see instructions) Use duplicate co					
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received			
1	15,000 Shares of Headwaters	\$196,	725 5/28/2014			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received			
1	10,000 Shares of Gartner Inc	\$ 691,	550 2/27/2014			
(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			
		\$				

Scriedule D (F	OIII 990, 990-EZ, 01 990-PF) (2012)			rage 4
Name of ore				Employer identification number
	KUTNICK & LAURA GORDON KUTNIC FO	DUNDATION		06-1469212
Part III	Exclusively religious, charitable, etc., i total more than \$1,000 for the year. Cor			
	For organizations completing Part III, ente			
	contributions of \$1,000 or less for the year			
	Use duplicate copies of Part III if additiona			· · · · · · · · · · · · · · · · · · ·
(a) No. from Part I	(b) Purpose of gift		) Use of gift	(d) Description of how gift is held
		(a) T	ransfer of gift	
		(6) 1	ransier or gift	
	Transferee's name, address, and a	ZIP + 4	Relationsh	ip of transferor to transferee
			}	
(a) No.	For Prov Country	<del></del>	L	
from Part I	(b) Purpose of gift	(c	) Use of gift	(d) Description of how gift is held
			•••••	
		(e) T	ransfer of gift	
			•	
	Transferee's name, address, and	ZIP + 4	Relationsh	ip of transferor to transferee
	For Prov Country			
(a) No.				
from Part i	(b) Purpose of gift	(c	) Use of gift	(d) Description of how gift is held
r ait i		<del></del>		
		(е) і	ransfer of gift	
	Transferee's name, address, and	71D + 1	Polationeh	ip of transferor to transferee
	Transfered 3 name, address, and		Kelutionsi	ip of transferor to transferor
(=) N=	For Prov Country	<del></del>		
(a) No. from	(b) Purpose of gift	(c	) Use of gift	(d) Description of how gift is held
Part I	(,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		<del></del>	( ) ( )
		**		
		(e) T	ransfer of gift	
	Turnet	71D	<b>.</b>	
	Transferee's name, address, and	<u> </u>	Relationsh	ip of transferor to transferee
	For Death Country			***************************************

THE DALE KUTNICK & LAURA C	SORDON KUTNIC FOL	JNDATI	ON	06-146	9212 Page	1 of 4
Continuation of Part XV, L	ine 3a (990-PF) -	Gran	ts and Con	tributions Paid	During t	he Year
Recipient(s) paid during the year						
Name						
Dartmouth College						
Street				<del></del>		
10 North Main Street						
City	<del></del>	Ctoto	7in Codo	Faraian Caus	<u> </u>	
Hanover			Zip Code	Foreign Coun	itry	
Relationship	Foundation Status	NH	03755			
None	PC					
Purpose of grant/contribution					Amount	
General Operating					Amount	5,000
					!	3,000
Name						
Danbury Hospital			<u> </u>			
Street						
24 Hospital Ave			Y			
City			Zip Code	Foreign Coun	itry	
Danbury	le 14: 6:4	СТ	06810			
Relationship	Foundation Status					
None Purpose of grant/contribution	PC				Ta	
					Amount	00.000
General Operating						30,000
Name						
Unitarian Church	. <u></u> .					
Street						
10 Lyons Plains Rd						
City			Zip Code	Foreign Coun	itry	
Westport	<u> </u>	L_CT	06880			
Relationship	Foundation Status					
None	PC				1.	
Purpose of grant/contribution					Amount	0.500
General Operating						6,500
Name						
Aldrıch Museum						
Street						
258 Main St						
City		1	Zip Code	Foreign Coun	itry	
Ridefield	le	CT	06877		<del></del>	
Relationship	Foundation Status					
None Purpose of grant/contribution	PC				1	
					Amount	4 000
General Operating						1,000
Name						
Riverkeeper						
Street						
20 Secor Rd			,			
City			Zip Code	Foreign Coun	itry	
Ossining		NY	10562			
Relationship	Foundation Status					
None	PC					
Purpose of grant/contribution					Amount	
General Operating						107,500
Name						
Wayne - Metropolitan Community Acti	on Agency					
Street						
2121 Biddle Ave Suite 102						
City		State	Zip Code	Foreign Coun	itry	
Wyandotte		MI	48192			
Relationship	Foundation Status					
None	PC					
Purpose of grant/contribution					Amount	
General Operating					1	500

THE DALE KUTNICK & LAURA (				06-146		
Continuation of Part XV, L	ine 3a (990-PF) -	Gran	ts and Con	tributions Paid	During th	e Year
Recipient(s) paid during the year			-	•		
Nama						
Name						
Greens Farms Academy Street						
35 Beachside Ave						
City	<del></del>	State	Zip Code	Foreign Coun	tnı	
Westport		CT	06880	Poreign Count	uy	
Relationship	Foundation Status		100000			
None	PC	•				
Purpose of grant/contribution					Amount	-
General Operating						10,000
		-		····		
Name						
Sacred Heart University Street	<del></del>			<del> </del>		<u></u>
5151 Park Ave						
City	<del></del>	State	Zip Code	Foreign Coun	tor	
Fairfield		CT	06825	Foreign Count	иу	
Relationship	Foundation Status		100023			
None	PC	,				
Purpose of grant/contribution					Amount	
General Operating					7	20,000
Name						
Friends on Earth					<del></del>	
Street						
1100 15th Street NW □ City		Ctoto	Zip Code	Foreign Coun		
· · · · · · · · · · · · · · · · · · ·		DC	20005	roreign Coun	ury	
Washington Relationship	Foundation Status		120005	i		
None	PC PC	•				
Purpose of grant/contribution				<del></del>	Amount	
General Operating					Amount	500
<u></u>			<del></del>		_!	
Name						
The Pilot House	<del> </del>					
Street						
240 Colony St City		State	Zip Code	Foreign Coun	tn.	
Fairfield		CT	06824	Foreign Coun	иу	
Relationship	Foundation Status		100024			
None	PC	•				
Purpose of grant/contribution		_			Amount	
General Operating						1,000
Name						
The Posse Foundation Street						
14 Wall St						
City	<del></del>	State	Zip Code	Foreign Coun	tnı	
New York		NY	10005	l'oreign coun	иу	
Relationship	Foundation Status		110003		··	
None	PC	•				
Purpose of grant/contribution			·		Amount	
General Operating						500
				<del></del>		
Name						
Redding Volunteer Fire Company No	1 Inc					
Street						
PO BOX 185[T]		Total	7:- 0-4	[F==-:= 0	4	
City			Zip Code	Foreign Coun	try	
Redding Ridge Relationship	Foundation Status	I CT	06876			<del> </del>
•	PC	•				
None Purpose of grant/contribution	IFC				Amount	
General Operating					Amount	_ 500
General Operating				···	<u></u>	

THE DALE KUTNICK & LAURA	GORDON KUTNIC FOL	JNDATI	ON	06- <u>146</u>	9212 Page	3 of 4
Continuation of Part XV, I	_ine 3a (990-PF) -	Gran	ts and Con	tributions Paid	During th	e Year
Recipient(s) paid during the year						
Name						
William J Clinton Foundation	<del></del>					
Street						
1271 Avenue of the Amer		04-4-	7:- 0 - 1-	le		
City New York		State   NY	Zip Code 10020	Foreign Coun	itry	
Relationship	Foundation Status		110020			
None	PC					
Purpose of grant/contribution			<u>-</u> .		Amount	
General Operating					<u> </u>	50,000
Name						
Childcare Learning Centers, Inc						
Street						
64 Palmers Hill Rd		C4=4=		<u> </u>		
City Stamford		State CT	<b>Zip Code</b> 06902	Foreign Coun	itry	
Relationship	Foundation Status		100902			
None	PC					
Purpose of grant/contribution					Amount	
General Operating	·		···			<u>6,000</u>
Name						
Connecticut's Beardsley Zoo						
Street	<del></del>					
1875 Noble Ave		<del>,</del>				
City			Zip Code	Foreign Coun	itry	
Bridgeport Relationship	Foundation Status	CT	06610			
None	PC PC	•				
Purpose of grant/contribution	11.0		<del></del>		Amount	<del></del>
General Operating						1,000
Name						
Cornell University						
Street	<del></del>	,				
144 East Ave						
City		State		Foreign Coun	itry	
Ithaca		NY	14853			
Relationship	Foundation Status	•				
None Purpose of grant/contribution				<u></u>	Amount	
General Operating					Amount	13,000
					<u> </u>	
Name Tickborne Disease Alliance						
Street			·			
214 Hommocks Road						
City		State	Zip Code	Foreign Cour	ntry	
Larchmont		NY	10538			
Relationship	Foundation Status	•				
None	PC				14	
Purpose of grant/contribution General Operating					Amount	20,000
						20,000
Name						
Yale Parents Fund						
Street 157 Church Street						
City	<del></del>	State	Zip Code	Foreign Cour	ntry	_
New Haven□		СТ	06510			
Relationship	Foundation Status		-			
None	PC				_r	
Purpose of grant/contribution					Amount	
General Operating					1	5,000

THE DALE KUTNICK & LAURA	<del></del>			06-146		
Continuation of Part XV,		Gran	ts and Con	tributions Paid	d During th	e Year
Recipient(s) paid during the year						
Name						
NPower NY						
Street						
3 MetroTech Roadway #3						
City	<del></del>	State	Zip Code	Foreign Coun	itry	
Brooklyn		NY	11201	. 5.5.3 552	,	
Relationship	Foundation Status		-			
None	PC					
Purpose of grant/contribution					Amount	
General Operating						4,000
Name						
National Multiple Sclerosis Society						
Street					<del> </del>	
733 3rd Ave						
City		State	Zip Code	Foreign Coun	ntry	
New York		NY	10017	r orongin o'ouin	,	
Relationship	Foundation Status		110017	<del></del>		
None	PC	-				
Purpose of grant/contribution					Amount	
General Operating					i	1,000
					-	
Name						
Garrett B Smith Foundation Street						
<del>-</del>						
<u>P O Box 5118</u> City		State	Zip Code	Foreign Coun	tn.	
Greenwich⊞		CT	06831	roreign coun	iuy	
Relationship	Foundation Status		100031	<u></u>	<del></del>	
None	PF	•				
Purpose of grant/contribution					Amount	_
General Operating					Amount	1,000
<del></del>				<del></del>		1,000
Name						
Westport Country Playhouse						
Street						
25 Powers Ct City		C4-4-	17:- O-d-	Foreign Coun	- <b>A</b>	
-			Zip Code	Foreign Coun	itry	
Westport Relationship	Foundation Status	<u>CT</u>	06880			<del></del>
None	PC PC	•				
Purpose of grant/contribution					Amount	
General Operating					Amount	1,000
						1,000
Name						
Street						
		1	12: 2	<del></del>		
City		State	Zip Code	Foreign Cour	ntry	
Deletionality	Ir	<u> </u>	<u> </u>			
Relationship	Foundation Status	5				
Durana of analysis and its attention				<del></del>	14	
Purpose of grant/contribution					Amount	
						··-
Name						
Street						
City		State	Zip Code	Foreign Cour	ntry	
Relationship	Foundation Status	6				
Purpose of grant/contribution					Amount	
		_			.1	

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Part I, Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

ΙL						Y																															ŀ	
Other	Expenses	766,292	0		-	Depreciation																																
Cost, Other	Basis and Expenses			Expense of Sale and Cost of	Improve-	ments																																
		1,167,492	0		Valuation	DOI III																																
Gross	Sales				Cost or	Outer Dasis	56.887	50.528	4,391	10,087	49,850	75,800	53,632	16.824	24,142	6,266	4,119	3,553	60,210	73,604	75 322	4.276	28 698	11.301	5,666	11,786	10,563	6,197	54.090	6.675	50,400	2,528	390	921	469	687	37	O
Totals	1	Capital Gains/Losses	Other sales		Gross Sales	11.853	77.508	65,777	4,346	9,347	40,576	284,988	51,135	28,786	25,387	7,179	4,959	6,274	75,729	94 168	76.095	5.046	49 927	21,330	7,896	19,372	14,287	8,556	56,604	7,387	84,464	3,079	470	1,069	641	868	0	20,528
		Ö		-	Sold	7/16/2013	6/27/2014	4/21/2014	7/9/2013	4/23/2014	4/23/2014	5/27/2014	12/20/2013	8/12/2013	8/12/2013	8/12/2013	8/12/2013	10/28/2013	8/13/2013	8/13/2013	11/19/2013	7/16/2013	8/13/2013	7/16/2013	7/16/2013	7/2/2013	7/2/2013	7/2/2013	12/20/2013	8/12/2013	10/28/2013	7/2/2013	7/2/2013	7/2/2013	7/2/2013	7/2/2013	12/31/2013	12/31/2013
					Acquisition											•																						
					Acquired	6/17/2010	2/3/2012	1/19/2012	2/8/2013	4/23/2013	12/13/2012	11/15/2007	4/23/2013	11/15/2010	7/7/2011	4/13/2011	2/15/2011	9/19/2012	4/5/2010	4/5/2010	1/19/2012	2/27/2013	9/13/2010	1/10/2012	213/2012	2/24/2010	4/13/2011	9/28/2010	4/23/2013	3/29/2012	7/31/2012	3/8/2010	2/15/2011	4/13/2011	12/21/2011	11/24/2009	12/31/2013	12/31/2013
				Check "X" if	Business																																	
					Purchaser																																	
•	Amount	1,831		-	CUSIP #	025816109	252430205	292505104	31428X106	02364W105	02364W105	366651107	459200101	565849106	565849106	565849106	565849106	581550103	756158101	81369Y886	87233Q108	883556102	92204A504	92826C839	949746101	976657106	976657106	976657106	G1151C101	565849106	58155Q103	G5785G107	G5785G107	G5785G107	G5785G107	G5785G107		
		Long Term CG Distributions	Short Term CG Distributions		Description	AMER EXPRESS COMPANY	DIAGEO PLC SPSD ADR NEW	ENCANA CORP	FEDEX CORP DELAWARE CO	AMERICA MOVIL SAB DE CV	AMERICA MOVIL SAB DE CV	GARTNER INC	INTL BUSINESS MACHINES	MARATHON OIL CORP	MARATHON OIL CORP	MARATHON OIL CORP	MARATHON OIL CORP	MCKESSON CORPORATION C	REAVES UTILITY INCOME FD	SECTOR SPDR UTILITIES	TC PIPELINES LP	THERMO FISHER SCIENTIFIC	VANGUARD HEALTH CARE ET	VISA INC CL A SHRS	WELLS FARGO & CO NEW DE	WISCONSIN ENERGY CORP	WISCONSIN ENERGY CORP	WISCONSIN ENERGY CORP	ACCENTURE PLC SHS	MARATHON OIL CORP	MCKESSON CORPORATION C	MALLINCKRODT PLC SHS	MALLINCKRODT PLC SHS	MALLINCKRODT PLC SHS	MALLINCKRODT PLC SHS	MALLINCKRODT PLC SHS	Section 1231 from TC pipeline	TC PIPELINE 4797 Ordinary Ga
			}	Check 'X'	to include in Part IV	×	×	×	×					×	×	×	×	×	×	×	×	×	×	×	×	×	×	×	×	×	×		×	×	×		×	X Y
			L			_	7	~	₹	8	۳	~	œ	۰	위	₽	2	2	7	의	쀠	=	쀠	9	2	7	2	2	₹	2	8	2	2	8	읾	핅	3	ä

Net Gain or Loss

Net Gain or Loss

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Part I, Line 11 (990-PF) - Other Income

	-5,212	0	0
	Revenue		
	and Expenses	Net Investment	Adjusted
Description	per_Books	Income	Net Income
1 Income from Partnership K-1	-5,212		

11/3/2014 1 21 07 PM - JSD - PGC - DALE KUTNICK AND LAURA GORDON KUTNIC

Part I, Line 16b (990-PF) - Accounting Fees

		2,500		) (	2,500
- [					Disbursements
		Revenue and			for Charitable
- {		Expenses per	Net Investment	Adjusted Net	Purposes
l	Description	Books	Income	Income	(Cash Basis Only)
L	1 TAX PREP FEES	2,500			2,500

### 11/3/2014 1.21 07 PM - JSD - PGC - DALE KUTNICK AND LAURA GORDON KUTNIC

Part I, Line 16c (990-PF) - Other Professional Fees

		42,531	25,518	0	17,012
					Disbursements
1		Revenue and			for Charitable
1		Expenses per	Net Investment	Adjusted Net	Purposes
	Description	Books	Income	Income	(Cash Basis Only)
[_1	Mernil Lynch Fees as Agent	42,531	25,518		17,012

## 11/3/2014 1 21.07 PM - JSD - PGC - DALE KUTNICK AND LAURA GORDON KUTNIC

Part I, Line 18 (990-PF) - Taxes

	10,580	1,882		0 0
	Revenue			Disbursements
	and Expenses	Net Investment	Adjusted	for Charitable
Description	per Books	Income	Net Income	Purposes
1 FOREIGN TAX WITHHELD	1,882	1,882		
2 ESTIMATED EXCISE PAYMENTS	8,698			

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Governmen
<b>State</b>
S. and Stat
U.S
) - Investments
a (990-PF)
0
, Line
Part II, Line 1

Ĭ.	Federal	114,023	113,966	0	127,136	
State/L	State/Local	0	0	0	0	
Num Shares/	_	Book Value	Book Value	FMV	FMV	State/Local
Description Face Value		Beg of Year	End of Year	Beg of Year	End of Year	Obligation
			0			
2 IU S TREASURY BONDS		0	35,190		44,833	
3 UNITED STATES TREAS NTS		0	25,018		25,387	
4 US TREASURY NOTE		0	53,758		56,916	

# 11/3/2014 1:21.07 PM - JSD - PGC - DALE KUTNICK AND LAURA GORDON KUTNIC

			2,000,010	4,1,0,001		
	Description	Num Shares/ Face Value	Book Value Beg of Year	Book Value End of Year	FMV Beg of Year	FMV End of Year
1						
7	AMERICAN EXPRESS COMPANY	0		55,678		105,027
က	APPLE COMPUTER INC COM	0		39,382		)96'68
4	BRISTOL MYERS SQUIBB CO COM	0		20,086		35,606
	CATERPILLAR INC	0		59,900		78,02
	CARDINAL HEALTH INC COM	0		75,373		90,156
	GARTNER INC NEW CL A	0		113,339		423,120
	HEWLETT PACKARD COMPANY	0		77,192		392'06
	HOME DEPOT INC USD 0 05	0		44,282		65,173
10	INTERNATIONAL BUSINESS MACHINES C	0		29,211		29,003
11	MC DONALDS CORPORATION COMMON	0		35,612		60,142
12	NIKE INC CL B	0		25,618		48,081
13	ORACLE CORPORATION	0		82,533		109,026
14	PFIZER INC COM	0		20,089		34,755
15		0		29,914		29,700
16	SCHLUMBERGER LIMITED COM	0		39,158		66,52
17	THERMO ELECTRON CORP	0		77,395		116,702
18	UNITED TECHNOLOGIES CORP	0		62,729		93,053
19	INTEL CORPORATION	0		49,725		50,212
20	JOHNSON & JOHNSON COM	0		20,031		34,106
21	FREEPORT-MCMORAN COPPER & GOLD	0		149,923		171,550
22	CVS CORP	0		65,021		121,647
23	KELLY SERVICES INC CL A NON-VTG	0		99,343		108,171
24	CUMMINS ENGINE INC	0		76,225		84,242
25	VALERO ENERGY CORP NEW	0		80,084		260'96
56	DIAGEO PLC SPON ADR NEW	0		56,850		78,653
27	FORRESTER RESH INC	0		33,125		37,880
28	WELLS FARGO & CO NEW	0		49,453		79,155
29	COSTCO WHSL CORP NEW	0		51,277		370
30	HONEYWELL INTL INC	0		57,361		99,456
34	DOMINION RES INC VA NEW	0		64,333		79,745
32	VERIZON COMMUNICATIONS INC	0		77,244		79,07
33	FEDEX CORPORATION	0		65,645		91,434
34	MONSANTO CO NEW	0		35,317		50,769
35	HEADWATERS INC	0		38,873		208,350
36	PRICE T ROWE GROUP INC	0		58,922		67,44
37	ENCANA CORP	0		50,357		67,574
38	COMCAST CORP NEW CL A	0		60,322		93,135
39	AUTOMATIC DATA PROCESSING INC CON	0		66,993		74,285
40	GOOGLE INC	0		40,488		40,927
41	HESS CORP	0		88,847		114,317
42	CHESAPEAKE ENERGY CORP	0		150,042		156,000
43	AMERICAN WTR WKS CO INC	0		47,816		390'68
44	VISA INC CL A SHRS	0		38,500		72,27
45	ACE LIMITED	0		25,107		48,117
46	COVIDIEN PLC SHS NEW	0		71,014		129,408

Part II, Line 10b (990-PF) - Investments - Corporate Stock

			2,000,878	7,778,387	<b>J</b>	4.196.477
		Num Shares/	Book Value	Book Value	FMV	FM
	Description	Face Value	Beg of Year	End of Year	Beg of Year	End of Year
47	CITIGROUP INC COM NEW	0		53,733		
48	IPSEN PROMESSES	0		48.888		81364
49	MERCK AND CO INC SHS	0		20,037		E.

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Corporate Bonds
- Investments -
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				394,255	823,000	0	842,571
		Interest	Maturity	Book Value	Book Value	FMV	FMV
	Description	Rate	Date	Beg of Year	End of Year	Beg of Year	End of Year
-							
7	CITIGROUP INC			0	25,013		25,886
က	JPMORGAN CHASE & CO			0	24,813		25,237
4	GOLDMAN SACHS GROUP INC			0	19,202		21,338
လ	VERIZON COMMUNICATIONS			0	48,500		50,336
ဖ	GENERAL ELEC CAP CORP			0	56,145		58,188
^	PEPSICO INC			0	75,990		83,450
<b>∞</b>	COMCAST CORP			0	53,145		57,640
6	9 VENTAS REALTY LP/CAP CRP			0	53,632		54,818
9	10 RENRE NORTH AMERICA HLDG			0	33,617		34,108
=	11 VORNADO REALTY LP			0	82,359		82,154
12				0	81,108		81,179
13				0	19,899		79,830
4				0	83,680		82,712
15				0	105,897		105,695

Part II, Line 13 (990-PF) - Investments - Other

			124,421	7,098,287	1.25/.277
		Basis of	Book Value	Book Value	FMV
	Asset Description	Valuation	Beg of Year	End of Year	End of Year
-				0	
7	SECTOR SPDR TR SHS BEN		0	78,265	114,589
က	REAVES UTIL INCOME FD		0	79,380	118,851
4	EATON VANCE ENH INCOME		0	149,100	148,060
S	VANGUARD HEALTH CARE		0	40,238	84,616
9	SPDR INDEX SHS FDS		0	252,185	315,871
7	SHARES DJ EPAC SEL DV		O	248,139	295,186
<b>∞</b>	BLACKROCK BUILD AMER BD		0	150,460	169,889
တ	HELIOS HIGH INCOME FD		0	100,520	10,215

## Part III (990-PF) - Changes in Net Assets or Fund Balances

Purchase of Accrued Interest c/o from PY	1	106
Total	<u>.</u> 2	106
Paris A. A. A. A.		
Bond Amortization	1	4,513
Excess FMV over Cost of Assets Contributed	11	
Excess FMV over Cost of Assets Contributed	1 2 3 3	660,263
Excess FMV over Cost of Assets Contributed	1 2 3 4	660,263 20,622
Excess FMV over Cost of Assets Contributed Gain on CY Sales Not Settled at Year End	1 2 3 4 5 5	4,513 660,263 20,622 15,618 3,282

# 11/3/2014 1:21:07 PM - JSD - PGC - DALE KUTNICK AND LAURA GORDON KUTNIC

Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

Long Term CG Distributions	1,831				1 165 661	•		200 937	96 906	c	•	c	,
Short Term Co Disknounce	2				100,001,1	•		767'00/	600,660				806,886
		HOW	Date	Date	Grass	Depreciation		Cost or Other Basis Plus		FMV as of	Adjusted Basis as of	Excess of FMV	Gains Minus Excess of FMV Over Adjusted
Description of Property Sold	CUSIP #	Acquired	Acquired	Sold	Sales Price	Allowed	Adjustments	Expense of Sale	Gain or Loss	12/31/69	12/31/69	Over Adi Basis	Basis or Losses
AMER EXPRESS COMPANY	025816109		0102/21/9	7/16/2013	11,853		0	66,9	5,460	0	0	0	5,480
DIAGEO PLC SPSD ADR NEW	252430205		2/3/2012	6/27/2014	77,508		0	56 887	20,621	0	0	0	20,621
ENCANA CORP	292505104		1/19/2012	4/21/2014	2777		0	50,528	15 249	0	0	0	15,249
FEDEX CORP DELAWARE COM	31428X108		2/8/2013	7/9/2013	4,346		0	4,391	-45	0	Ö	0	-45
AMERICA MOVIL SAB DE CV	02364W105		4/23/2013	4/23/2014	9,347		0	10,01	-740	O	0	0	-740
AMERICA MOVIL SAB DE CV	02384W105		12/13/2012	4/23/2014	40,576		0	49,850	-9,274	0	0	0	-9,274
GARTNER INC	366651107		11/15/2007	5/27/2014	284,988		0	75,800	209,188	0	0	0	209,188
INTL BUSINESS MACHINES	459200101		4/23/2013	12/20/2013	51,135		0	53,632	2,497	0	0	0	-2,497
AARATHON OIL CORP	565849108		11/15/2010	8/12/2013	28,786		0	16,824	11,962	0	0	0	11,962
MARATHON OIL CORP	565849108		1102/1/1	8/12/2013	25,387		0	24,142	1,245	o	0	0	1,245
MARATHON OIL CORP	565849106		4/13/2011	8/12/2013	671,7		0	6,266	913	0	o	0	913
MARATHON OIL CORP	565849106		1102/51/2	8/12/2013	4,959		0	4,119	840	0	0	0	840
MCKESSON CORPORATION COM	581550103		2102/51/6	10/28/2013	8 274		0	3 553	2,721	0	lo	0	2 721
REAVES UTILITY INCOME FD	758158101		01,02/5/19	8/13/2013	15,729		0	60,210	15,519	0	o	0	15,519
SECTOR SPOR UTILITIES	81369Y888		4/5/2010	8/13/2013	94,168		0	73,604	20,564	0	o	0	20,584
TC PIPELINES LP	872330108		1/19/2012	11/19/2013	260'92		0	75,322	273	0	0	0	173
THERMO FISHER SCIENTIFIC	883558102		2/27/2013	7/16/2013	5,046		0	4,276		0	0	0	770
VANGUARD HEALTH CARE ETF	92204A504		9/13/2010	8/13/2013	49,927		0	28,698		0	o	0	21,229
VISA INC CL A SHRS	92826C839		1/10/2012	7/16/2013	21,330		0	11,301		0	0	0	10,029
WELLS FARGO & CO NEW DEL	949746101		2/3/2012	7/16/2013	7,896		0	999'\$	2	0	0	0	2,230
WISCONSIN ENERGY CORP	976657108		2/24/2010	772/2013	19 372		0	11 786	1,586	0	o	0	7,586
WISCONSIN ENERGY CORP	978657108		4/13/2011	7/2/2013	14 287		0	10,583	3,724	0	Jo	0	3,724
WISCONSIN ENERGY CORP	976857108		9/28/2010	7/2/2013	8,556		0	6,197	2,359	0	0	0	2,359
24 ACCENTURE PLC SHS	G1151C101		4/23/2013	12/20/2013	56,604		0	94 090	2 514	0	0	0	2,514
MARATHON OIL CORP	565849108		3/29/2012	8/12/2013	7,387		0	6,675	712	0	О	0	712
28 MCKESSON CORPORATION COM	581550103		7/31/2012	10/28/2013	84,464		0	20,400	34,064	0	0	0	34,064
MALLINCKRODT PLC SHS	G5785G107		3/8/2010	7/2/2013	3,079		0	2 528	551	0	0	0	551
28 MALLINCKRODT PLC SHS	G5785G107		2/15/2011	7/2/2013	470		0	380	08	0	0	0	90
29 MALLINCKRODT PLC SHS	G5785G107		4/13/2011	7/2/2013	1,069		0	921	148	0	0	0	148
30 MALLINCKRODT PLC SHS	G5785G107		12/21/2011	7/2/2013	641		0	1697	172	0	0	0	172
31 MALLINCKRODT PLC SHS	G5785G107		11/24/2009	7/2/2013	868		0	289	211	0	0	0	211
Section 1231 from TC pipeline			12/31/2013 12/31/2013	12/31/2013	0			37	-37	0	0	0	-37
33 TC PIPELINE 4797 Ordinary Gain			12/31/2013 12/31/2013	12/31/2013	20,528			0	20,528	0	0	0	20.528

11/3/2014 1·21·07 PM - JSD - PGC - DALE KUTNICK AND LAURA GORDON KUTNIC

Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

								0	0	•
Check "X" Name if Business	X* Street	City	State	State Zip Code	Foreign Country	Title	Avg Hrs Per Week	Avg Hrs Per Week Compensation	Benefits	Expense Account
	23 Sherman Turnpike	Redding	СТ	96890		Secretary	2 00			•
aura Gordon Kulnıck	23 Sherman Turnpike	Redding	CT	96890		President	00 9			

11/3/2014 1:21 07 PM - JSD - PGC - DALE KUTNICK AND LAURA GORDON KUTNIC

Part VI, Line 6a (990-PF) - Estimated Tax Payments

4	Cradd from an annual control of	Date	Amount
	Credit from prior year return	1	192
2	First quarter estimated tax payment	2	<u> </u>
3	Second quarter estimated tax payment	3	
4	Third quarter estimated tax payment	4	
5	Fourth quarter estimated tax payment	5	
6	Other payments	6	8,698
_7	Total	. 7	8,890

1 Distributable amounts for 2012 that remained undistributed at the beginning of the 2013 tax year	1	96,838
2	2	
3	3	
4	4	
5	5	
6	6	
7	7	
8	8	
9	9	
0 Total	<u>. 10</u>	96,838