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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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▶ **Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.**

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 07-01-2013 , and ending 06-30-2014

Name of foundation Robertshaw Charitable Foundation		A Employer identification number 25-1622184
Number and street (or P O box number if mail is not delivered to street address) Room/suite 116 North Main Street		B Telephone number (see instructions) (724) 832-7576
City or town, state or province, country, and ZIP or foreign postal code Greensburg, PA 15601		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 1,443,677	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	25,000	25,000	25,000	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	76,920			
	b Gross sales price for all assets on line 6a 315,690				
	7 Capital gain net income (from Part IV, line 2) . . .		76,920		
	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)					
12 Total. Add lines 1 through 11	101,920	101,920	25,000		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0	0	0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	3,975	0	0	3,975
	c Other professional fees (attach schedule)	11,777	11,777	0	0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	13,801	0	0	13,801
	24 Total operating and administrative expenses. Add lines 13 through 23	29,553	11,777	0	17,776
	25 Contributions, gifts, grants paid	56,674			56,674
26 Total expenses and disbursements. Add lines 24 and 25	86,227	11,777	0	74,450	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	15,693				
b Net investment income (if negative, enter -0-)		90,143			
c Adjusted net income (if negative, enter -0-)			25,000		

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

Part II Balance Sheets		Beginning of year			End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	10					
	2 Savings and temporary cash investments	28,879	22,192	22,192			
	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						
	10a Investments—U S and state government obligations (attach schedule)						
	b Investments—corporate stock (attach schedule)						
	c Investments—corporate bonds (attach schedule)						
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____						
	12 Investments—mortgage loans						
	13 Investments—other (attach schedule)	1,027,473	1,049,863	1,421,485			
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____						
15 Other assets (describe ▶ _____)							
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,056,362	1,072,055	1,443,677				
Liabilities	17 Accounts payable and accrued expenses	2,000	2,000				
	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)	2,000	2,000					
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.						
	24 Unrestricted	1,054,362	1,070,055				
	25 Temporarily restricted						
	26 Permanently restricted						
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> 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 page 17 of the instructions)	1,054,362	1,070,055					
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,056,362	1,072,055					

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,054,362
2	Enter amount from Part I, line 27a	2	15,693
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	1,070,055
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,070,055

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a See Additional Data Table			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	76,920
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	53,898

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	70,683	1,229,840	0.057473
2011	70,698	1,167,828	0.060538
2010	68,872	1,203,783	0.057213
2009	56,958	1,115,338	0.051068
2008	53,093	1,028,712	0.051611

2 Total of line 1, column (d).	2	0.277903
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	0.055581
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	1,399,369
5 Multiply line 4 by line 3.	5	77,778
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	901
7 Add lines 5 and 6.	7	78,679
8 Enter qualifying distributions from Part XII, line 4.	8	74,450

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 page 18 of the instructions)

Table with 11 rows for excise tax calculations. Includes categories like Exempt operating foundations, Domestic foundations, Tax under section 511, Credits/Payments, and Tax due. Total tax due is 1,501.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about influencing legislation, political expenditures, unrelated business income, and substantial contributors. Includes Yes/No columns.

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of The Foundation Telephone no (724) 832-7576 Located at 116 N Main Street Greensburg PA Greensburg PA ZIP +4 15601			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> 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? See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country	16	Yes	No

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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years 20___, 20___, 20___, 20___ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20___, 20___, 20___, 20___			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

<p>5a During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(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). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? 5b</p> <p>Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/></p> <p>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? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," attach the statement required by Regulations section 53.4945–5(d).</p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b No If "Yes" to 6b, file Form 8870.</p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? 7b</p>	
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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
See Additional Data Table				

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000. **0**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.	▶	0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
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	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3	▶

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	1,393,665
b	Average of monthly cash balances.	1b	27,014
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,420,679
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	1,420,679
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	21,310
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,399,369
6	Minimum investment return. Enter 5% of line 5.	6	69,968

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	69,968
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	1,803
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,803
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	68,165
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	68,165
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	68,165

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	74,450
b	Program-related investments—total from Part IX-B.	1b	0
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	74,450
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	74,450

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				68,165
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 20__ , 20__ , 20__		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.	2,133			
b From 2009.	1,448			
c From 2010.	9,577			
d From 2011.	13,133			
e From 2012.	10,643			
f Total of lines 3a through e.	36,934			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ <u>74,450</u>				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				68,165
e Remaining amount distributed out of corpus	6,285			
5 Excess distributions carryover applied to 2013 <i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	43,219			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions).	2,133			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	41,086			
10 Analysis of line 9				
a Excess from 2009.	1,448			
b Excess from 2010.	9,577			
c Excess from 2011.	13,133			
d Excess from 2012.	10,643			
e Excess from 2013.	6,285			

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling.

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

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

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

1 Information Regarding Foundation Managers:

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

John A Robertshaw Jr

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed
 The Foundation Manager co The Rober
 116 N Main ST
 Greensburg, PA 15601
 (724) 832-7578

b The form in which applications should be submitted and information and materials they should include
 Brief description of the request and the organization submitted by mail

c Any submission deadlines
 Semi-annually

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

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 Additional Data Table				
Total				3a 56,674
b <i>Approved for future payment</i>				
Total				3b 0

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
Federated Mortgage Fd 517 063shs	P		2014-06-03
T Rowe Price Growth Stk 115 252	P		2014-06-03
T Rowe Price Value Fd 139 899shs	P		2014-06-03
Vanguard Sh TRM Treasury 373 482shs	P		2014-06-03
Dodge & Cox Stock Fd 30 346shs	P		2014-02-20
Federated Instl TR HI Yield 125 678shs	P		2014-02-20
Federated Mortgage Fd 1296 767shs	P		2014-02-20
Fidelity Floating Rate High Income Fd 71 443shs	P		2014-02-20
Fidelity Advisor SER VIII Emerging 231 949shs	P		2014-02-20
Harbor Int'l Fd 137 714shs	P		2014-02-20
T Rowe Price Growth Stk 445 745	P		2014-02-20
Vanguard Primecap Fd 92 931shs	P		2014-02-20
Vanguard Inflation Protected 7 538shs	P		2014-02-20
Vanguard GNMA Fd 64 773shs	P		2014-02-20
Artisan Mid Cap 1055 369shs	P		2013-08-07
Dodge & Cox Stock Fd 16 397shs	P		2013-08-07
Federated Strategic Value Dividend Fd 955 893shs	P		2013-08-07
Federated Instl TR HI Yield 86 323shs	P		2013-08-07
Fidelity Advisor Int'l Discovery 597 282shs	P		2013-08-07
Fidelity Advisor SER VIII Emerging 305 531shs	P		2013-08-07
Harbor Int'l Fd 962 385shs	P		2013-08-07
Neuberger Berman Genesis Fd 893 654shs	P		2013-08-07
Vanguard GNMA Fd 1532 310shs	P		2013-08-07
Vanguard Inflation Protected 518 242shs	P		2013-08-07
Capital Gains Dividends	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
5,000		5,083	-83
6,000		3,410	2,590
5,000		3,549	1,451
4,000		4,052	-52
5,093		3,345	1,748
1,297		1,179	118
12,436		12,675	-239
713		678	35
3,071		2,962	109
9,640		7,390	2,250
23,571		13,190	10,381
9,215		4,851	4,364
195		186	9
685		701	-16
48,452		37,111	11,341
2,479		1,807	672
5,353		2,896	2,457
871		810	61
21,998		22,416	-418
4,143		3,902	241
63,604		54,830	8,774
36,792		28,642	8,150
16,043		16,580	-537
7,017		6,525	492
23,022			23,022

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-83
			2,590
			1,451
			-52
			1,748
			118
			-239
			35
			109
			2,250
			10,381
			4,364
			9
			-16
			11,341
			672
			2,457
			61
			-418
			241
			8,774
			8,150
			-537
			492
			23,022

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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
John A Robertshaw Jr 116 N Main St Greensburg, PA 15601	Director 1 00	0	0	0
Anne B Robertshaw 116 N Main St Greensburg, PA 15601	Director 2 00	0	0	0
John A Robertshaw III 116 N Main St Greensburg, PA 15601	Director 1 00	0	0	0
Marc B Robertshaw 116 N Main St Greensburg, PA 15601	Director 2 00	0	0	0
Lisa Robertshaw Moeller 116 N Main St Greensburg, PA 15601	Director 1 00	0	0	0
Natalie R Kelley 116 N Main St Greensburg, PA 15601	Director 1 00	0	0	0

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Action for Animals 386 State Rte 217 Latrobe, PA 15601	not related	not related	Equipment	3,000
Big Brothers and Sisters of the Laurel Region 106 N Main St Greensburg, PA 15601	not related	not related	Supplies and lunches for school based mentoring program	2,000
Greensburg Salem Athletic Department 65 Mennel Dr Greensburg, PA 15601	not related	not related	Equipment	5,000
Westmoreland Cultural Trust 102 N Main St Ste 232 Greensburg, PA 15601	not related	not related	Equipment	2,500
Westmoreland Yough Trail Chapter PO Box 95 West Newton, PA 15089	not related	not related	Equipment	3,000
Greensburg Community Development 41 West Otterman St Greensburg, PA 15601	not related	not related	Specific charitable useInternship program	1,000
Humane Society of Westmoreland County PO Box 1552 Greensburg, PA 15601	not related	not related	Animal microchips & Scanner	4,000
Ligonier Valley YMCA 110 West Church St Ligonier, PA 15658	not related	not related	Specific charitable usecapital campaign	1,600
Make A Wish Foundation 707 Grant Street 37th Floor Pittsburgh, PA 15219	not related	not related	Local wish	3,900
St Emma's Monastary 1001 Harvey Ave Greensburg, PA 15601	not related	not related	Provide handicap parking spaces	5,000
St Vincent College 300 Fraser Purchase Rd Latrobe, PA 15650	not related	not related	Pilot Program for students	1,000
Outside in School of Experiential Education PO Box 639 Greensburg, PA 15601	not related	not related	Repairs to climbing wall	1,000
Ligonier Valley Meals on Wheels PO Box 119 Ligonier, PA 15658	not related	not related	Serving trays and cutting boards	850
Westmoreland County Historical Society 362 Sand Hill Rd Ste 1 Greensburg, PA 15601	not related	not related	40th celebration	500
Westmoreland Arts & Heritage 252 Twin Lakes Road Latrobe, PA 15650	not related	not related	Office Sign	1,000
Total				56,674

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Westmoreland County Blind Assoc 911 South Main St Greensburg, PA 15601	not related	not related	Equipment	3,500
Westmoreland County Community College 145 Pavilion Ln Youngwood, PA 15697	not related	not related	Nursing Program equipment	2,000
Westmoreland County Food Bank 100 Devonshire Dr Delmont, PA 15626	not related	not related	computer equipment	2,500
American Red Cross 351 Harvey Ave Greensburg, PA 15601	not related	not related	Cots for shelter residents	1,150
Westmoreland Symphomy 951 Old Salem Rd Ste 1 Greensburg, PA 15601	not related	not related	To support the youth symphony	2,000
YMCA of Greensburg 101 South maple Avenue Greensburg, PA 15601	not related	not related	Equipment	2,000
YWCA of Westmoreland County 424 N Main St Greensburg, PA 15601	not related	not related	Computer Equipment	1,100
Christian Layman Corps 258 E Pittsburgh St Greensburg, PA 15601	not related	not related	Emergency Beds Program	1,074
Homes Build Hope 218 South Maple Ave Ste 101 Greensburg, PA 15601	not related	not related	Provide a recreation area	3,000
Jeannette Public Library 500 Magee Ave Jeannette, PA 15644	not related	not related	Computer Equipment	2,000
Ligonier Valley Historical Society 1386 Route 30 E Laughintown, PA 15655	not related	not related	Fencing for Compass Inn Museum	1,000
Total	3a			56,674

TY 2013 Accounting Fees Schedule

Name: Robertshaw Charitable Foundation

EIN: 25-1622184

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	3,975	0	0	3,975

TY 2013 Investments - Other Schedule**Name:** Robertshaw Charitable Foundation**EIN:** 25-1622184

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
VANGUARD PRIMECAP FD	AT COST	127,684	228,083
NEUBERGER BERMAN GEN FD ADVSR CL #990	AT COST	17,786	22,147
HARBOR INT'L FD #411 INVSTR CL	AT COST	49,746	66,690
DODGE & COX STK FD	AT COST	88,759	132,967
FEDERATED MTG FD 837	AT COST	88,754	87,720
T ROWE PRICE GROWTH STK	AT COST	127,300	209,875
T ROWE PRICE VALUE FUND	AT COST	94,322	149,525
FEDERATED INSTL TR HI YLD BD#900	AT COST	22,240	23,891
FEDERATED INTERMDTE CORP BD CL IS#303	AT COST	63,719	62,832
FEDERATED STRATEGIC VAL A #661	AT COST	37,408	67,411
FIDELITY ADVSR DISC INTER CL A	AT COST	49,216	65,250
FIDELITY ADVISOR SER VIII EMERGING	AT COST	14,604	16,086
VANGUARD INFLATION PROTECTED	AT COST	14,478	15,231
ARTISIAN MIDCAP	AT COST	14,432	20,526
FIDELITY FLOATING HIGH INCOME FD	AT COST	20,310	20,723
VANGUARD SH TERM TREAS IV #0032	AT COST	49,794	49,236
VANGUARD GNMA FUND 36	AT COST	15,074	15,011
VANGUARD DIVIDEND GROWTH FUND	AT COST	126,070	140,194
GOLDMAN SACHS STRATEGIC INCOME FUND	AT COST	28,167	28,087

TY 2013 Other Expenses Schedule

Name: Robertshaw Charitable Foundation

EIN: 25-1622184

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Office & Administrative Fees	13,801	0	0	13,801

TY 2013 Other Professional Fees Schedule

Name: Robertshaw Charitable Foundation

EIN: 25-1622184

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Management Fees First Commonwealth Trust Department	11,777	11,777	0	0