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Return of Private Foundation

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

OMB No. 1545-0052

2013

Department of the Treasury
Internal Revenue ServiceDo not enter Social Security numbers on this form as it may be made public.
Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2013 or tax year beginning OCT 1, 2013, and ending SEP 30, 2014

Name of foundation
SHIFT FKA Aaron & Martha Schecter Private Foundation

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
3900 Hollywood Blvd PH-N

City or town, state or province, country, and ZIP or foreign postal code
Hollywood, FL 33021

A Employer identification number
59-2185762

B Telephone number
954-923-6778

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) **\$ 13,286,074.** (Part I, column (d) must be on cash basis.)

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(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			N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	58.	58.		Statement 1
	4 Dividends and interest from securities	280,069.	280,069.		Statement 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	286,365.			
	b Gross sales price for all assets on line 6a	3,841,516.			
	7 Capital gain net income (from Part IV, line 2)		286,365.		
	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)					
11 Other income					
12 Total. Add lines 1 through 11	566,492.	566,492.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees	200.	0.		0.
	b Accounting fees	5,549.	5,549.		0.
	c Other professional fees	105,168.	95,128.		0.
	17 Interest				
	18 Taxes	5,711.	1,553.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses	52,025.	48,437.		0.
	24 Total operating and administrative expenses. Add lines 13 through 23	168,653.	150,667.		0.
	25 Contributions, gifts, grants paid	1,790,000.			1,790,000.
26 Total expenses and disbursements. Add lines 24 and 25	1,958,653.	150,667.		1,790,000.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-1,392,161.				
b Net investment income (if negative, enter -0-)		415,825.			
c Adjusted net income (if negative, enter -0-)			N/A		

**SHIFT FKA Aaron & Martha Schechter
Private Foundation**

Form 990-PF (2013)

59-2185762

Page 2

Part II Balance Sheets <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing		1.	1.
	2 Savings and temporary cash investments	806,946.	1,063,063.	1,063,063.
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶ Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations Stmt 8	2,839,395.	1,652,143.	1,597,619.
	b Investments - corporate stock Stmt 9	7,247,327.	6,632,118.	8,710,905.
	c Investments - corporate bonds Stmt 10	1,765,622.	1,923,962.	1,897,145.
	11 Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation ▶			
15 Other assets (describe ▶ Prepaid Expense)	21,499.	17,341.	17,341.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	12,680,789.	11,288,628.	13,286,074.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	12,680,789.	11,288,628.	
30 Total net assets or fund balances	12,680,789.	11,288,628.		
31 Total liabilities and net assets/fund balances	12,680,789.	11,288,628.		

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)	12,680,789.
2 Enter amount from Part I, line 27a	-1,392,161.
3 Other increases not included in line 2 (itemize) ▶	0.
4 Add lines 1, 2, and 3	11,288,628.
5 Decreases not included in line 2 (itemize) ▶	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	11,288,628.

**SHIFT FKA Aaron & Martha Schecter
Private Foundation**

Form 990-PF (2013)

59-2185762 Page **3**

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 Attached Stmt			
b See Attached Stmt			
c Capital Gains Dividends			
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 673,267.		595,799.	77,468.
b 3,150,804.		2,959,352.	191,452.
c 17,445.			17,445.
d			
e			

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			77,468.
b			191,452.
c			17,445.
d			
e			

2 Capital gain net income or (net capital loss)	<div> <div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div> </div>	2	286,365.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	<div> <div>If gain, also enter in Part I, line 8, column (c).</div> <div>If (loss), enter -0- in Part I, line 8</div> </div>	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	1,824,143.	13,697,805.	.133170
2011	1,234,099.	14,292,037.	.086349
2010	834,637.	14,596,760.	.057180
2009	1,520,467.	11,049,638.	.137603
2008	473,237.	10,350,942.	.045719

2 Total of line 1, column (d)	2	.460021
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	.092004
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	13,496,947.
5 Multiply line 4 by line 3	5	1,241,773.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,158.
7 Add lines 5 and 6	7	1,245,931.
8 Enter qualifying distributions from Part XII, line 4	8	1,790,000.

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.

**SHIFT FKA Aaron & Martha Schecter
Private Foundation**

Form 990-PF (2013)

59-2185762 Page 4

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	4,158.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	4,158.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	4,158.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a 19,642.		
b Exempt foreign organizations - tax withheld at source	6b		
c 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	19,642.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	15,484.
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax <input checked="" type="checkbox"/> 15,484. Refunded <input type="checkbox"/>		11	0.

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 participate or intervene in any political campaign?	Yes	No
1a		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1b		
c Did the foundation file Form 1120-POL for this year?		X
1c		
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2	X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5	X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> FL		
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	X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

N/A

Form 990-PF (2013)

**SHIFT FKA Aaron & Martha Schecter
Private Foundation**

Form 990-PF (2013)

59-2185762

Page 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 meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► Koffler, Adorno and Associates, LLC Telephone no. ► 954-983-7133 Located at ► 3900 Hollywood BLVD., PH-N, Hollywood, FL ZIP+4 ► 33021			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
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 the 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
				X

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 instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	
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	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ►		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.)	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

Form 990-PF (2013)

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870.

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
LAURIE SCHECTER	TRUSTEE			
4500 NORTH SURF ROAD				
HOLLYWOOD, FL 33019	0.00	0.	0.	0.
JULIE SCHECTER	TRUSTEE			
72 WEST BERLIN ROAD				
BOLTON, MA 01776	0.00	0.	0.	0.
CAROL GOLOFF	TRUSTEE			
15 BRYANT STREET				
PORTLAND, ME 04103	0.00	0.	0.	0.
WILL HAPGOOD	TRUSTEE			
72 WEST BERLIN ROAD				
BOLTON, MA 01776	0.00	0.	0.	0.

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

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

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

0

Form 990-PF (2013)

Part VIII

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of 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 N/A	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

**SHIFT FKA Aaron & Martha Schecter
Private Foundation**
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	13,077,319.
b	Average of monthly cash balances	1b	625,165.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	13,702,484.
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	13,702,484.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	205,537.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	13,496,947.
6	Minimum investment return. Enter 5% of line 5	6	674,847.

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	674,847.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	4,158.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	4,158.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	670,689.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	670,689.
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	670,689.

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	1,790,000.
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	1,790,000.
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	5	4,158.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,785,842.

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				670,689.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008				
b From 2009	469,902.			
c From 2010	159,525.			
d From 2011	531,299.			
e From 2012	1,142,967.			
f Total of lines 3a through e	2,303,693.			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ 1,790,000.				
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				670,689.
e Remaining amount distributed out of corpus	1,119,311.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:	3,423,004.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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 instr.			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)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	3,423,004.			
10 Analysis of line 9:				
a Excess from 2009	469,902.			
b Excess from 2010	159,525.			
c Excess from 2011	531,299.			
d Excess from 2012	1,142,967.			
e Excess from 2013	1,119,311.			

N/A

- b** Check-box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(I)(3) or ☐ 4942(I)(5)

- [illegible]

- b 85% of line 2a**

- c** Qualifying distributions from Part XII,
line 4 for each year listed

- d** Amounts included in line 2c not used directly for active conduct of exempt activities

- e Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c:

- 3** Complete 3a, b, or c for the alternative test relied upon:

- a "Assets" alternative test - enter:
(1) Value of all assets

- (2) Value of assets qualifying under section 4942(j)(3)(B)(i)

- b "Endowment" alternative test** - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

- c "Support" alternative test - enter:**

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

- (3) Largest amount of support from an exempt organization**

- (4) Gross investment income**

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

1 Information Regarding Foundation Managers:

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

None

- 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, charitable fields, kinds of institutions, or other factors:

SHIFT FKA Aaron & Martha Schechter

Form 990-PF (2013)

Private Foundation

59-2185762 Page 11

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ACLU Foundation 4500 Biscayne Blvd. Suite 340 Miami, FL 33137		PUBLIC	UNRESTRICTED DONATION	5,000.
Center for a New American Dream 455 2nd Street SE, Suite 101 Charlottesville, VA 22902		PUBLIC	UNRESTRICTED DONATION	100,000.
Demos 220 Sth Avenue 5th Floor New York, NY 10001		PUBLIC	UNRESTRICTED DONATION	1,000,000.
Hampshire College 893 West Street Amherst, MA 01002		PUBLIC	UNRESTICTED DONATION	500,000.
Henry L.Stimson 1111 19th Street NW, 12th Floor Washington, DC 20036		PUBLIC	UNRESTRICTED DONATION	15,000.
Total			See continuation sheet(s)	1,790,000.
b Approved for future payment				
None				
Total				0.

**SHIFT FKA Aaron & Martha Schecter
Private Foundation**

59-2185762

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

<div>Recipient</div> <div>Name and address (home or business)</div>	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
New Isreal Fund 330 7th Avenue, 11th Floor New York, NY 10001		PUBLIC	UNRESTRICTED DONATION	10,000.
Pro-Choice MA Foundation 15 Court Square, Ste 900 Boston, MA 02108		PUBLIC	UNRESTRICTED DONATION	10,000.
Project on Government Oversight 1100 G Street NW, Suite 500 Washington, DC 20005		PUBLIC	UNRESTRICTED DONATION	15,000.
Tides Center 1014 Torney Avenue San Francisco, CA 94129		PUBLIC	UNRESTRICTED DONATION	35,000.
NonProfit Vote 89 South Street Boston, MA 02111		PUBLIC	UNRESTRICTED DONATION	25,000.
Sustainable Economies Law Center 436 14th Street, Ste 1120 Oakland, CA 94612		PUBLIC	UNRESTRICTED DONATION	75,000.
Total from continuation sheets				170,000.

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

- | | | Yes | No |
|----------|--|-------|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| 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. | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

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

Signature of officer or trustee: X [Signature]

Date _____

Title

Trustee

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

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

Dennis J. Koffler,
CPA

Preparer's signature

Dennis K. L. CPA

Date

5/22/15

Check ☐ self-employed

PTIN

P00178045

Firm's name ▶ Koffler, Adorno & Associates, LLC

Firm's EIN ▶ 20-0644948

Firm's address ▶ 3900 Hollywood Blvd. PH-N
Hollywood, FL 33021

Phone no. **954-983-7133**

Form 990-PF. Interest on Savings and Temporary Cash Investments Statement 1

Source	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Suntrust - various	58.	58.	
Total to Part I, line 3	58.	58.	

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Boston Trust - Dividends	208,610.	17,445.	191,165.	191,165.	
Boston Trust - Interest	88,904.	0.	88,904.	88,904.	
To Part I, line 4	297,514.	17,445.	280,069.	280,069.	

Form 990-PF Legal Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Legal Fees	200.	0.		0.
To Fm 990-PF, Pg 1, ln 16a	200.	0.		0.

Form 990-PF	Accounting Fees			Statement	4
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Accounting Fees	5,549.	5,549.			0.
To Form 990-PF, Pg 1, ln 16b	5,549.	5,549.			0.

Form 990-PF	Other Professional Fees			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Management Fees	95,128.	95,128.			0.
Consulting	10,040.	0.			0.
To Form 990-PF, Pg 1, ln 16c	105,168.	95,128.			0.

Form 990-PF	Taxes			Statement	6
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Foreign Taxes	1,553.	1,553.			0.
Excise Tax	4,158.	0.			0.
To Form 990-PF, Pg 1, ln 18	5,711.	1,553.			0.

Form 990-PF	Other Expenses			Statement	7
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Investment Fees	48,157.	48,157.			0.
Bank Charges	280.	280.			0.
Travel	3,588.	0.			0.
To Form 990-PF, Pg 1, ln 23	52,025.	48,437.			0.

Form 990-PF	U.S. and State/City Government Obligations	Statement	8
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Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value
Government and Agency Bonds	X		1,489,613.	1,432,801.
Municipal Obligations		X	162,530.	164,818.
Total U.S. Government Obligations			1,489,613.	1,432,801.
Total State and Municipal Government Obligations			162,530.	164,818.
Total to Form 990-PF, Part II, line 10a			1,652,143.	1,597,619.

Form 990-PF	Corporate Stock	Statement	9
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Description	Book Value	Fair Market Value
Corporate Stock - Various	6,632,118.	8,710,905.
Total to Form 990-PF, Part II, line 10b	6,632,118.	8,710,905.

Form 990-PF	Corporate Bonds	Statement	10
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Description	Book Value	Fair Market Value
Corporate Bond - Various	1,923,962.	1,897,145.
Total to Form 990-PF, Part II, line 10c	1,923,962.	1,897,145.

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Totals

Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
200. NIKE INC CL B COM	09/25/2012	10/01/2013	14,488.45	9,551.99	4,936.46
13.02 GNMA POOL #215914					
8/15/17	12/13/1988	10/15/2013	13.02	13.57	-0.55
2.32 GNMA POOL #268215					
3/15/19	12/11/1992	10/15/2013	2.32	2.32	NONE
2628.28 GNMA POOL #783452	08/14/2012	10/15/2013	2,628.28	2,835.67	-207.39
950. EXPEDITORS INTL WASH INC COM	08/13/2012	10/28/2013	44,107.35	34,978.52	9,128.83
1900. INTEL CORP	VAR	10/28/2013	46,134.61	49,110.81	-2,976.20
1500. SYSCO CORP	08/13/2012	10/28/2013	50,002.82	45,494.85	4,507.98
13.13 GNMA POOL #215914					
8/15/17	12/13/1988	11/15/2013	13.13	13.68	-0.55
2.34 GNMA POOL #268215					
3/15/19	12/11/1992	11/15/2013	2.34	2.34	NONE
700.53 GNMA POOL #783452					
10/15/41	08/14/2012	11/15/2013	700.53	755.81	-55.28
1000000. FHLB (FED HM LN BKS) 0.375%	08/14/2012	11/27/2013	1000000.00	1001480.00	-1,480.00
13.23 GNMA POOL #215914					
8/15/17	12/13/1988	12/15/2013	13.23	13.79	-0.56
2.36 GNMA POOL #268215					
3/15/19	12/11/1992	12/15/2013	2.36	2.36	NONE
1975.57 GNMA POOL #783452	08/14/2012	12/15/2013	1,975.57	2,131.45	-155.88
13.34 GNMA POOL #215914					
8/15/17	12/13/1988	12/31/2013	13.34	13.90	-0.56
2.38 GNMA POOL #268215					
3/15/19	12/11/1992	12/31/2013	2.38	2.38	NONE
900.17 GNMA POOL #783452					
10/15/41	08/14/2012	12/31/2013	900.17	971.20	-71.03
13.44 GNMA POOL #215914					
8/15/17	12/13/1988	01/31/2014	13.44	14.00	-0.56
2.4 GNMA POOL #268215					
3/15/19	12/11/1992	01/31/2014	2.40	2.40	NONE
673.41 GNMA POOL #783452					
10/15/41	08/14/2012	01/31/2014	673.41	726.55	-53.14
Totals					

Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
260. TIME WARNER CABLE INC	VAR	03/04/2014	36,395.77	24,615.29	11,780.48
13.55 GNMA POOL #215914 9%					
8/15/17	12/13/1988	03/15/2014	13.55	14.12	-0.57
2.42 GNMA POOL #268215 10%					
3/15/19	12/11/1992	03/15/2014	2.42	2.42	NONE
2201.11 GNMA POOL #783452 3.5%	08/14/2012	03/15/2014	2,201.11	2,374.79	-173.68
2113.831 WALDEN SMID CAP INNOVATIONS	02/01/2013	03/31/2014	29,530.22	25,070.04	4,460.18
10660.981 WALDEN SMID CAP INNOVATIONS	02/01/2013	04/03/2014	150,000.00	126,439.23	23,560.77
13.66 GNMA POOL #215914 9%					
8/15/17	12/13/1988	04/15/2014	13.66	14.23	-0.57
2.44 GNMA POOL #268215 10%					
3/15/19	12/11/1992	04/15/2014	2.44	2.44	NONE
1289.32 GNMA POOL #783452 3.5%	08/14/2012	04/15/2014	1,289.32	1,391.06	-101.74
13.76 GNMA POOL #215914 9%					
8/15/17	12/13/1988	05/15/2014	13.76	14.34	-0.58
3.79 GNMA POOL #268215 10%					
3/15/19	12/11/1992	05/15/2014	3.79	3.79	NONE
1826.1 GNMA POOL #783452 3.5%					
10/15/41	08/14/2012	05/15/2014	1,826.10	1,970.19	-144.09
100. ADVANCED AUTO PARTS INC	02/01/2013	05/22/2014	12,264.72	7,322.99	4,941.73
200. APACHE CORP COM	08/13/2012	05/22/2014	18,045.70	17,581.98	463.72
200. APTARGROUP INC COM	09/25/2012	05/22/2014	13,185.90	10,413.98	2,771.92
400. BG GROUP PLC ADR	08/13/2012	05/22/2014	8,327.81	8,332.00	-4.19
7468.26 WALDEN SMID CAP INNOVATIONS	02/01/2013	05/22/2014	100,000.00	88,573.56	11,426.44
100. CHUBB CORP COM	02/01/2013	05/22/2014	9,218.80	8,386.99	831.81
100. CISCO SYSTEMS INC	02/01/2013	05/22/2014	2,430.95	2,084.94	346.01
100. COLGATE-PALMOLIVE COMPANY	02/01/2013	05/22/2014	6,647.86	5,464.25	1,183.61
100. COMMERCE BANCSHARES INC	02/01/2013	05/22/2014	4,324.91	3,601.90	723.01
200. CONOCOPHILLIPS	04/11/2011	05/22/2014	15,715.67	12,322.51	3,393.16
100. DEERE & CO COM	02/01/2013	05/22/2014	9,006.81	9,495.99	-489.18
100. DENTSPLY INTL INC NEW COM	08/13/2012	05/22/2014	4,680.90	3,852.61	828.29
200. DONALDSON INC COM	02/01/2013	05/22/2014	8,015.82	7,603.42	412.40
200. E M C CORP MASS	09/25/2012	05/22/2014	5,295.90	5,475.90	-180.00
100. ILLINOIS TOOL WORKS	VAR	05/22/2014	8,594.80	5,880.60	2,714.20
200. J P MORGAN CHASE & CO COM	02/01/2013	05/22/2014	10,901.77	9,571.98	1,329.79
Totals					



Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
200. LINCOLN ELECTRIC HOLDINGS	03/12/2013	05/22/2014	13,057.71	11,437.98	1,619.73
25. M & T BK CORP COM	02/01/2013	05/22/2014	3,011.96	2,603.72	408.24
100. MCDONALDS CORP COM	03/12/2013	05/22/2014	10,234.77	9,882.99	351.78
100. MEDTRONIC INC COM	02/01/2013	05/22/2014	5,973.87	4,701.95	1,271.92
700. MICROSOFT CORP COM	VAR	05/22/2014	28,076.44	21,313.85	6,762.59
100. NESTLE S A SPONSORED ADR REPSTG REG SH					
100. OMNICOM GROUP COM	03/12/2013	05/22/2014	7,844.82	7,202.00	642.82
300. ORACLE CORP COM	02/01/2013	05/22/2014	6,935.85	5,457.50	1,478.35
100. PRAXAIR INC COM	02/01/2013	05/22/2014	12,506.75	10,838.97	1,667.78
500. RECKITT BENCKISER-SPON ADR	02/01/2013	05/22/2014	13,043.71	11,176.90	1,866.81
400. ROCHE HOLDINGS LTD ADR	02/01/2013	05/22/2014	8,469.81	6,690.00	1,779.81
300. SIGMA ALDRICH CORP COM	03/12/2013	05/22/2014	14,959.66	11,374.00	3,585.66
200. STATE STREET CORP COM	VAR	05/22/2014	29,129.35	23,492.83	5,636.52
100. STRYKER CORP COM	VAR	05/22/2014	12,935.73	11,704.93	1,230.80
100. UNITED PARCEL SERVICE - CL B	02/01/2013	05/22/2014	8,033.82	6,294.00	1,739.82
100. ACCENTURE PLC IRELAND	03/12/2013	05/22/2014	10,162.78	8,437.99	1,724.79
100. CORE LABORATORIES NV	VAR	05/22/2014	7,939.83	7,794.25	145.58
1806.358 WALDEN SMID CAP INNOVATIONS	02/01/2013	06/13/2014	15,996.64	12,784.25	3,212.41
400000. FHLB (FED HM LN BK)	VAR	06/13/2014	25,000.00	21,423.41	3,576.59
13.87 GNMA POOL #215914	VAR	06/13/2014	400,000.00	412,358.00	-12,358.00
8/15/17					
3.08 GNMA POOL #268215	12/13/1988	06/15/2014	13.87	14.45	-0.58
3/15/19					
2434.82 GNMA POOL #783452	12/11/1992	06/15/2014	3.08	3.08	NONE
450. INTL BUSINESS MACHINES CORP CAP	08/14/2012	06/15/2014	2,434.82	2,626.94	-192.12
13.98 GNMA POOL #215914	VAR	07/07/2014	84,585.62	84,454.18	131.44
8/15/17					
8.76 GNMA POOL #268215	12/13/1988	07/15/2014	13.98	14.57	-0.59
3/15/19					
3799.89 GNMA POOL #783452	12/11/1992	07/15/2014	8.76	8.76	NONE
100000. HOUSING URBAN DEVELOP 4.14%	08/14/2012	07/15/2014	3,799.89	4,099.72	-299.83
1000. EDWARDS LIFESCIENCES CORP	10/01/2012	08/01/2014	100,000.00	107,036.00	-7,036.00
14.09 GNMA POOL #215914	06/14/2013	08/13/2014	95,859.58	69,987.00	25,872.58
8/15/17					
Totals	12/13/1988	08/15/2014	14.09	14.68	-0.59

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FEDERAL CAPITAL GAIN DISTRIBUTIONS

=====

CAPITAL GAIN DISTRIBUTIONS

WALDEN SMID CAP INNOVATIONS

17,445.24

TOTAL CAPITAL GAIN DISTRIBUTIONS (ROUNDED)

17,445.00

=====

STATEMENT 11

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. SHIFT FKA Aaron & Martha Schechter Private Foundation	Employer identification number (EIN) or 59-2185762
	Number, street, and room or suite no. If a P.O. box, see instructions. 3900 Hollywood Blvd, No. PH-N	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. Hollywood, FL 33021	

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

04

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

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

Koffler, Adorno and Associates, LLC

- The books are in the care of **3900 Hollywood BLVD., PH-N - Hollywood, FL 33021**

Telephone No. **954-983-7133**

Fax No.

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **August 15, 2015**.

5 For calendar year , or other tax year beginning **OCT 1, 2013**, and ending **SEP 30, 2014**.

6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

7 State in detail why you need the extension

Taxpayer requires additional time to gather all documents.

8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	4,158.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	19,642.
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature

Title **Trustee**

Date

Form 8868 (Rev. 1-2014)