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Return of Private Foundation

OMB No 1545-0052

2013

Department of the Treasury

Internal Revenue Service

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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 NOV 1, 2013, and ending OCT 31, 2014

Name of foundation

THE BENNIE & MARTHA BENJAMIN
FOUNDATION, INC

A Employer identification number

13-3555717

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

Room/suite

C/O D.A. BEALE, 301 W. ATLANTIC AVE.

05

B Telephone number

561-243-1477

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

DELRAY BEACH, FL 33444

C If exemption application is pending, check here ☐

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☒ Address change☐ Name changeD 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐

I Fair market value of all assets at end of year

(from Part II, col (c), line 16)

\$ 1,906,507. (Part I, column (d) must be on cash basis.)

J Accounting method:

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

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

(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	12,043.	12,043.		STATEMENT 1
	4	Dividends and interest from securities	13,571.	13,571.		STATEMENT 2
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	2,422.			
	b	Gross sales price for all assets on line 6a	93,772.			
	7	Capital gain net income (from Part IV, line 2)		2,422.		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
Operating and Administrative Expenses	b	Less Cost of goods sold				
	c	Gross profit or (loss)				
	11	Other income	95,374.	83,654.		STATEMENT 3
	12	Total. Add lines 1 through 11	123,410.	111,690.		
	13	Compensation of officers, directors, trustees, etc	59,700.	0.		0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees	4,785.	4,785.		0.
	b	Accounting fees	4,000.	2,000.		2,000.
	c	Other professional fees	20,671.	19,231.		1,440.
	17	Interest				
	18	Taxes	3,839.	3,839.		0.
	19	Depreciation and depletion				
	20	Occupancy	1,650.	825.		825.
	21	Travel, conferences, and meetings	7,628.	0.		7,628.
	22	Printing and publications				
	23	Other expenses	1,112.	862.		246.
	24	Total operating and administrative expenses. Add lines 13 through 23	103,385.	31,542.		12,139.
	25	Contributions, gifts, grants paid	54,737.			54,737.
	26	Total expenses and disbursements. Add lines 24 and 25	158,122.	31,542.		66,876.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	-34,712.			
	b	Net investment income (if negative, enter -0-)		80,148.		
	c	Adjusted net income (if negative, enter -0-)			N/A	

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10-10-13

LHA For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2013)

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FOUNDATION, INC**

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Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	52,310.	101,279.	101,279.
	2 Savings and temporary cash investments	477,656.	437,214.	437,214.
	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 ▶ 48,280.			
	Less: allowance for doubtful accounts ▶ 0.	0.	48,280.	48,280.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations STMT 9	125,525.	121,412.	108,960.
	b Investments - corporate stock STMT 10	315,661.	328,942.	586,513.
	c Investments - corporate bonds STMT 11	107,568.	54,731.	50,831.
	Liabilities	11 Investments - land, buildings, and equipment basis ▶ 220,000.		
Less: accumulated depreciation ▶		220,000.	220,000.	160,000.
12 Investments - mortgage loans STMT 12		125,000.	125,000.	125,000.
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ STATEMENT 13)		288,000.	288,430.	288,430.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)		1,711,720.	1,725,288.	1,906,507.
17 Accounts payable and accrued expenses				
18 Grants payable				
19 Deferred revenue		48,280.		
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.	48,280.		
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	1,711,720.	1,677,008.	
30 Total net assets or fund balances	1,711,720.	1,677,008.		
31 Total liabilities and net assets/fund balances	1,711,720.	1,725,288.		

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	1,711,720.
2 Enter amount from Part I, line 27a	2	-34,712.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,677,008.
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	1,677,008.

**THE BENNIE & MARTHA BENJAMIN
FOUNDATION, INC**
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				
b SEE ATTACHED STATEMENT				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 93,772.		91,350.	2,422.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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			
b			
c			
d			
e			2,422.

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	2,422.
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). If (loss), enter -0- in Part I, line 8		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	88,706.	1,779,008.	.049863
2011	160,817.	1,837,472.	.087521
2010	109,179.	1,942,910.	.056194
2009	142,647.	1,950,278.	.073142
2008	210,222.	2,021,508.	.103993

2 Total of line 1, column (d)	2	.370713
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	.074143
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	1,807,512.
5 Multiply line 4 by line 3	5	134,014.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	801.
7 Add lines 5 and 6	7	134,815.
8 Enter qualifying distributions from Part XII, line 4 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.	8	66,876.

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FOUNDATION, INC**

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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)		1	1,603.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	1,603.
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	1,603.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	430.	
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	430.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	25.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed SEE STATEMENT 14	9	1,198.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax Refunded	11		

Part VII-A Statements Regarding Activities

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

N/A

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► BENNIEBENJAMINFOUNDATION.ORG	13	X	
14	The books are in care of ► DAVID A BEALE Telephone no. ► 561-243-1477 Located at ► 301 W ATLANTIC AVE, STE 05, DELRAY BEACH, FL ZIP+4 ► 33444			
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	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
			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	2b
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <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	3b
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

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ 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

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

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?

6b

X

If "Yes" to 6b, file Form 8870

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

☐ Yes ☒ No

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

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
JACK N ALBERT	DIRECTOR			
7500 BONDSBERRY COURT				
BOCA RATON, FL 33434	5.00	17,650.	0.	0.
DAVID A BEALE	DIRECTOR			
11894 ISLAND LAKE LANE				
BOCA RATON, FL 33498	5.00	27,900.	0.	0.
SEYMOUR BRAUN, ESQ.	DIRECTOR			
110 EAST 59TH STREET, S-3201				
NEW YORK, NY 10022	5.00	14,150.	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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	712,587.
b	Average of monthly cash balances	1b	566,792.
c	Fair market value of all other assets	1c	555,659.
d	Total (add lines 1a, b, and c)	1d	1,835,038.
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	1,835,038.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	27,526.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,807,512.
6	Minimum investment return. Enter 5% of line 5	6	90,376.

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	90,376.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	1,603.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,603.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	88,773.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	88,773.
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	88,773.

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	66,876.
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	66,876.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	66,876.

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				88,773.
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	90,920.			
b From 2009	48,330.			
c From 2010	14,163.			
d From 2011	60,757.			
e From 2012	1,473.			
f Total of lines 3a through e	215,643.			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$	66,876.			
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				66,876.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	21,897.			21,897.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	193,746.			
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	69,023.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	124,723.			
10 Analysis of line 9:				
a Excess from 2009	48,330.			
b Excess from 2010	14,163.			
c Excess from 2011	60,757.			
d Excess from 2012	1,473.			
e Excess from 2013				

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

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

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

	Tax year		Prior 3 years		(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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:

SEE ATTACHED STATEMENT A

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:

THE BENNIE & MARTHA BENJAMIN

Form 990-PF (2013)

FOUNDATION, INC

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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 Paid during the year				
COMMUNITY FOUNDATION OF THE VIRGIN ISLANDS PO BOX 11790 ST THOMAS, VI 00801-4790	NONE	PUBLIC	CANCER PATIENT FUND	1,000.
PARTNERS FOR HEALTH 312 ROSA L PARKS AVE, NASHVILLE, TN 37243	NONE	PUBLIC	JOURNAL AD BACK COVER	750.
SCHNEIDER REGIONAL MEDICAL CENTER 9048 SUGAR ESTATE ST THOMAS, VI 00802	NONE	PUBLIC - MEDICAL	NURSING EXTERNSHIP PROGRAM 2013, EQUIPMENT UPGRADE LABOUR AND DELIVERY, HOSPICE & PALLIATIVE NURSE	42,772.
UNIVERSITY OF NORTHERN COLORADO 501 20TH STREET GREELEY, CO 80639	NONE	PUBLIC - EDUCATION	SCHOLARSHIP	4,612.
UNIVERSITY OF VIRGIN ISLANDS RR 1, BOX 10000 KINGSHILL ST CROIX, VI 00802	NONE	PUBLIC - EDUCATION	SCHOOL OF NURSING - EQUIPMENTS, CERC HEALTH DISPARTIES CONFERENCE.	5,603.
Total			3a	54,737.
b Approved for future payment				
NONE				
Total			3b	0.

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** SEE PURPOSE OF GRANT CONTINUATIONS

Form 990-PF (2013)

11

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2013.05060 THE BENNIE & MARTHA BENJAMI 1090__1

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		Related or exempt function income
1 Program service revenue:						
a INDIVIDUALS RETURN OF						
b GRANTS RESCINDED						11,720.
c						
d						
e						
f						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments			14	12,043.		
4 Dividends and interest from securities			14	13,571.		
5 Net rental income or (loss) from real estate:						
a Debt-financed property						
b Not debt-financed property						
6 Net rental income or (loss) from personal property						
7 Other investment income			15	83,654.		
8 Gain or (loss) from sales of assets other than inventory			18	2,422.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a						
b						
c						
d						
e						
12 Subtotal. Add columns (b), (d), and (e)		0.		111,690.		11,720.
13 Total. Add line 12, columns (b), (d), and (e)					13	123,410.

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

2013.05060 THE BENNIE & MARTHA BENJAMI 1090 1

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
CITIBANK	21.	21.	
FYAMA WENNER	5,622.	5,622.	
UBS	6,400.	6,400.	
TOTAL TO PART I, LINE 3	12,043.	12,043.	

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
UBS	13,571.	0.	13,571.	13,571.	
TO PART I, LINE 4	13,571.	0.	13,571.	13,571.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ROYALTIES	83,654.	83,654.	
INDIVIDUALS RETURN OF GRANTS RESCINDED	11,720.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	95,374.	83,654.	

FORM 990-PF	LEGAL FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LEGAL FEES	4,785.	4,785.			0.
TO FM 990-PF, PG 1, LN 16A	4,785.	4,785.			0.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING FEES	4,000.	2,000.			2,000.
TO FORM 990-PF, PG 1, LN 16B	4,000.	2,000.			2,000.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PROFESSIONAL SECRETARY	14,400.	12,960.			1,440.
INVESTMENT MANAGEMENT FEES	6,271.	6,271.			0.
TO FORM 990-PF, PG 1, LN 16C	20,671.	19,231.			1,440.

FORM 990-PF	TAXES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
REAL ESTATE	1,411.	1,411.			0.
FOREIGN TAXES	256.	256.			0.
FEDERAL INCOME TAX PAYMENTS & REFUNDS	2,172.	2,172.			0.
TO FORM 990-PF, PG 1, LN 18	3,839.	3,839.			0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BANK SERVICE CHARGES	50.	50.		0.	
ADMIN & OPERATING EXPENSES	751.	501.		246.	
LICENSES & FEES	311.	311.		0.	
TO FORM 990-PF, PG 1, LN 23	1,112.	862.		246.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	9
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
INVESTMENTS - US & STATE GOVT BONDS	X		121,412.	108,960.	
TOTAL U.S. GOVERNMENT OBLIGATIONS			121,412.	108,960.	
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS					
TOTAL TO FORM 990-PF, PART II, LINE 10A			121,412.	108,960.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	10
DESCRIPTION			BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS - STOCKS			328,942.	586,513.
TOTAL TO FORM 990-PF, PART II, LINE 10B			328,942.	586,513.

FORM 990-PF	CORPORATE BONDS	STATEMENT	11
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
INVESTMENTS - CORPORATE BONDS	54,731.	50,831.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	54,731.	50,831.	

FORM 990-PF	MORTGAGE LOANS	STATEMENT	12
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
MORTGAGE RECEIVABLE	125,000.	125,000.	
TOTAL TO FORM 990-PF, PART II, LINE 12	125,000.	125,000.	

FORM 990-PF	OTHER ASSETS	STATEMENT	13
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
CLOSELY HELD STOCK	288,000.	288,000.	288,000.
OTHER RECEIVABLE	0.	430.	430.
TO FORM 990-PF, PART II, LINE 15	288,000.	288,430.	288,430.

FORM 990-PF	INTEREST AND PENALTIES	STATEMENT	14
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TAX DUE FROM FORM 990-PF, PART VI	1,173.
UNDERPAYMENT PENALTY	25.
LATE PAYMENT INTEREST	12.
LATE PAYMENT PENALTY	23.
TOTAL AMOUNT DUE	1,233.

FORM 990-PF		LATE PAYMENT PENALTY			STATEMENT 15	
DESCRIPTION	DATE	AMOUNT	BALANCE	MONTHS	PENALTY	
TAX DUE	03/15/15	1,173.	1,173.	4	23.	
DATE FILED	07/15/15		1,173.			
TOTAL LATE PAYMENT PENALTY					23.	

FORM 990-PF		LATE PAYMENT INTEREST			STATEMENT 16	
DESCRIPTION	DATE	AMOUNT	BALANCE	RATE	DAYS	INTEREST
TAX DUE	03/15/15	1,173.	1,173.	.0300	122	12.
DATE FILED	07/15/15		1,185.			
TOTAL LATE PAYMENT INTEREST						12.

Section XV, Part 2:

2a:

David A. Beale, Executive Director
The Bennie and Maratha Benjamin Foundation, Inc.
55 SE 2nd Avenue, Suite #301,
Delray Beach, FL 33444

2b:

Forms and material are available on website: <http://www.benniebenjaminfoundation.org>

2c:

Submission deadlines for grant, loans, scholarships and other awards are set forth on website:
<http://www.benniebenjaminfoundation.org>

There are no deadlines for other grants

2d:

Restrictions and limitations are set forth on website:

<http://www.benniebenjaminfoundation.org>, but generally (i) grants and awards are strictly limited to 501(c) corporations located in the United States Virgin Islands and authorized under its laws who provide health care services that directly benefit the residents of the US Virgin Islands and (ii) scholarships and loans are restricted to people who have resided in the US Virgin Islands for at least the preceding five (5) years and who seek education or training in a health care field that directly impacts the delivery of health care in the US Virgin Islands and have committed to practice in the US Virgin Islands making use of such education and skills for a designated period of years.

STATEMENT A



Business Services Account
October 2014

Account name:
THE BENJAMIN FOUNDATION
TN 85786 SV

Your Financial Advisor:
SOUNDVIEW WEALTH MANAGEMENT
203-622-8666/800-628-8174

Your assets

Some prices, income and current values shown may be approximate. As a result, gains and losses may not be accurately reflected. See *Important information about your statement* at the end of this document for more information.

Cash

Cash and money balances

Holding	Opening balance on Oct 1 (\$)	Closing balance on Oct 31 (\$)	Price per share on Oct 31 (\$)	Average rate	Dividend/interest period	Days in period
Cash	69.95	0.00				
RMA GOVERNMENT PORTFOLIO	512,984.27	437,214.47	1.00	0.01%	Sep 24 to Oct 26	33
Total	\$513,054.22	\$437,214.47				

Equities

Common stock

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Oct 31 (\$)	Value on Oct 31 (\$)	Unrealized gain or loss (\$)	Holding period
AUTOMATIC DATA PROCESSING INC Symbol: ADP Exchange: OTC EAI: \$480 Current yield: 2.35%	Oct 12, 10	250,000	36.609	9,152.36	81.780	20,445.00	11,292.64	LT
BOEING COMPANY Symbol: BA Exchange: NYSE EAI: \$292 Current yield: 2.34%	Aug 1, 14	100,000	121.032	12,103.25	124.910	12,491.00	387.75	ST
CATERPILLAR INC Symbol: CAT Exchange: NYSE EAI: \$420 Current yield: 2.76%	Jun 20, 13	150,000	82.445	12,366.75	101.410	15,211.50	2,844.75	LT
CDK GLOBAL INC COM Symbol: CDK Exchange: OTC CENOVUS ENERGY INC CAD Symbol: CVE Exchange: NYSE EAI: \$284 Current yield: 3.82%	Oct 12, 10	83,000	15.601	1,294.94	33.600	2,788.80	1,493.86	LT
CAD Exchange rate: 1.12745 COCA COLA CO COM Symbol: KO Exchange: NYSE EAI: \$488 Current yield: 2.91%	Jun 23, 03	300,000	9.251	2,775.42	24.760	7,428.00	4,652.58	LT
	Sep 30, 10	400,000	29.319	11,727.68	41.880	16,752.00	5,024.32	LT



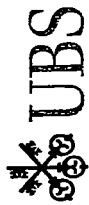
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Page 5 of 16



Business Services Account
October 2014

Account name:
Account number:
THE BENJAMIN FOUNDATION
TN 85786 SV

Your Financial Advisor:
SOUNDVIEW WEALTH MANAGEMENT
203-622-8666/800-628-8174

Your assets • Equities • Common stock (continued)

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Oct 31 (\$)	Value on Oct 31 (\$)	Unrealized gain or loss (\$)	Holding period
CONOCOPHILLIPS Symbol: COP Exchange: NYSE EAI: \$584 Current yield: 4.05%	Oct 19, 10	200.000	46.178	9,235.79 ✓	72.150	14,430.00	5,194.21	LT
DOW CHEMICAL Symbol: DOW Exchange: NYSE EAI: \$370 Current yield: 3.00%	Oct 3, 14	250.000	50.869	12,717.25	49.400	12,350.00	-367.25	ST
DU PONT DE NEMOURS Symbol: DD Exchange: NYSE EAI: \$376 Current yield: 2.72%	Sep 27, 10	200.000	45.469	9,093.84 ✓	69.150	13,830.00	4,736.16	LT
ENCANA CORP CAD Symbol: ECA Exchange: NYSE EAI: \$84 Current yield: 1.50%	Jun 23, 03	300.000	9.823	2,947.08 ✓	18.630	5,589.00	2,641.92	LT
ENSCO PLC CL A Symbol: ESV Exchange: NYSE EAI: \$600 Current yield: 7.39%	Apr 26, 10	200.000	51.498	10,299.60 ✓	40.590	8,118.00	-2,181.60	LT
EXPRESS SCRIPTS HLDG CO Symbol: ESRX Exchange: OTC	Mar 27, 95	38.000	6.032	229.24 ✓	76.820	2,919.16	2,689.92	LT
EXXON MOBIL CORP Symbol: XOM Exchange: NYSE EAI: \$828 Current yield: 2.85%	May 15, 01	300.000	44.795	13,438.70 ✓	96.710	29,013.00	15,574.30	LT
GENL ELECTRIC CO Symbol: GE Exchange: NYSE EAI: \$528 Current yield: 3.41%	Jan 3, 11	600.000	18.520	11,112.00 ✓	25.810	15,486.00	4,374.00	LT
GENUINE PARTS CO Symbol: GPC Exchange: NYSE EAI: \$460 Current yield: 2.37%	Oct 26, 10	200.000	47.668	9,533.60 ✓	97.080	19,416.00	9,882.40	LT
HELMERICH & PAYNE INC Symbol: HP Exchange: NYSE EAI: \$344 Current yield: 3.17%	Jun 12, 14	125.000	113.072	14,134.00	86.820	10,852.50	-3,281.50	ST
ILLINOIS TOOL WORKS INC Symbol: ITW Exchange: NYSE EAI: \$776 Current yield: 2.13%	Oct 23, 95	400.000	14.557	5,823.15 ✓	91.050	36,420.00	30,596.85	LT

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Business Services Account
October 2014

Account name:
Account number:
THE BENJAMIN FOUNDATION
TN 85786 SV

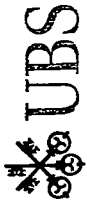
Your Financial Advisor:
SOUNDVIEW WEALTH MANAGEMENT
203-622-8666/800-628-8174

Your assets • Equities • Common stock (continued)

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Oct 31 (\$)	Value on Oct 31 (\$)	Unrealized gain or loss (\$)	Holding period
INTEL CORP Symbol: INTC Exchange: OTC EAI: \$450 Current yield: 2.65%	Sep 27, 10	500.000	19.307	9,653.50 ✓	34.010	17,005.00	7,351.50	LT
JOHNSON & JOHNSON COM Symbol: JNJ Exchange: NYSE EAI: \$560 Current yield: 2.60%	Feb 23, 07	200.000	64.278	12,855.70 ✓	107.780	21,556.00	8,700.30	LT
LEUCADIA NATIONAL CORP Symbol: LUK Exchange: NYSE EAI: \$125 Current yield: 1.05%	Jan 31, 05	500.000	18.475	9,237.97 ✓	23.780	11,890.00	2,652.03	LT
LOCKHEED MARTIN CORP Symbol: LMT Exchange: NYSE EAI: \$900 Current yield: 3.15%	Sep 27, 10	150.000	72.578	10,886.70 ✓	190.570	28,585.50	17,698.80	LT
MARATHON OIL CORP Symbol: MRO Exchange: NYSE EAI: \$210 Current yield: 2.37%	Jan 12, 11	250.000	24.729	6,182.35 ✓	35.400	8,850.00	2,667.65	LT
MARATHON PETROLEUM CO Symbol: MPC Exchange: NYSE EAI: \$250 Current yield: 2.20%	Jan 12, 11	125.000	32.138	4,017.25 ✓	90.900	11,362.50	7,345.25	LT
MICROSOF CORP Symbol: MSFT Exchange: OTC EAI: \$496 Current yield: 2.64%	Apr 19, 10	400.000	30.997	12,399.00 ✓	46.950	18,780.00	6,381.00	LT
NORFOLK STHN CORP Symbol: NSC Exchange: NYSE EAI: \$684 Current yield: 2.06%	Feb 3, 05	300.000	34.850	10,455.00 ✓	110.640	33,192.00	22,737.00	LT
NOVARTIS AG SPON ADR Symbol: NVS Exchange: NYSE EAI: \$468 Current yield: 2.52%	Sep 28, 10	200.000	58.050	11,610.00 ✓	92.690	18,538.00	6,928.00	LT
PAC KAGING CORP OF AMERICA Symbol: PKG Exchange: NYSE EAI: \$320 Current yield: 2.22% ✓	Oct 3, 14	200.000	64.202	12,840.40	72.080	14,416.00	1,575.60	ST
PHILLIPS 66 Symbol: PSX Exchange: NYSE EAI: \$200 Current yield: 2.55%	Oct 19, 10	100.000	29.122	2,912.21 ✓	78.500	7,850.00	4,937.79	LT

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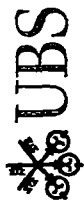
Business Services Account
October 2014

Account name:
Account number:

THE BENJAMIN FOUNDATION
TN 85786 SV
Your Financial Advisor:
SOUNDVIEW WEALTH MANAGEMENT
203-622-8666/800-628-8174

Your assets • Equities • Common stock (continued)

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Oct 31 (\$)	Value on Oct 31 (\$)	Unrealized gain or loss (\$)	Holding period
PROCTER & GAMBLE CO Symbol: PG Exchange: NYSE EAI: \$1,030 Current yield: 2.95%		400.000	---This information was unavailable---		87.270	34,908.00		
RAYTHEON CO NEW Symbol: RTN Exchange: NYSE EAI: \$484 Current yield: 2.33%	Dec 27, 12	200.000	57.443	11,488.72	103.880	20,776.00	9,287.28	LT
SPECTRA ENERGY CORP Symbol: SE Exchange: NYSE EAI: \$536 Current yield: 3.42%	Nov 23, 10	400.000	23.679	9,471.68	39.130	15,652.00	6,180.32	LT
SYSCO CORP Symbol: SYY Exchange: NYSE EAI: \$348 Current yield: 3.01%	Nov 23, 10	300.000	29.120	8,736.00	38.540	11,562.00	2,826.00	LT
TEVA PHARMACEUTICALS IND LTD ISRAEL ADR Symbol: TEVA Exchange: OTC EAI: \$231 Current yield: 2.05%	Feb 14, 11	200.000	51.328	10,265.60	56.470	11,294.00	1,028.40	LT
THERMO FISHER SCIENTIFIC INC Symbol: TMO Exchange: NYSE EAI: \$120 Current yield: 0.51%	Apr 26, 10	200.000	54.108	10,821.60	117.570	23,514.00	12,692.40	LT
WALGREEN CO Symbol: WAG Exchange: NYSE EAI: \$270 Current yield: 2.10%	Aug 7, 13	200.000	49.810	9,962.18	64.220	12,844.00	2,881.82	LT
Total				\$311,780.51		\$566,114.96	\$219,426.45	
Total estimated annual income: \$14,596								



Business Services Account
October 2014

Account name:
Account number:

THE BENJAMIN FOUNDATION
TN 85786 SV
Your Financial Advisor:
SOUNDVIEW WEALTH MANAGEMENT
203-622-8666/800-628-8174

Your assets • Equities (continued)

Closed end funds & Exchange traded products

Total reinvested is the total of all reinvested dividends. It does not include any cash dividends. It is not a tax lot for the purposes of determining holding periods or cost basis. The shares you receive each time you reinvest dividends become a separate tax lot.

Cost basis is the total purchase cost of the security, including reinvested dividends. The cost basis may need to be adjusted for return of capital payments in order to determine the adjusted cost basis for tax reporting purposes.

Unrealized (tax) gain or loss is the difference between the current value and the cost basis and would generally be your taxable gain or loss if the security was sold on this date. The unrealized (tax) gain or loss may need to be adjusted for return of capital payments in order to determine the realized gain or loss for tax reporting purposes.

Investment return is the current value minus the amount you invested. It does not include shares that are not reflected on your statement, including shares that have been realized as either a gain or a loss. It also does not include cash dividends that were not reinvested.

Holding	Number of shares	Purchase price/ Average price per share (\$)	Client investment (\$)	Cost basis (\$)	Price per share on Oct 31 (\$)	Value on Oct 31 (\$)	Unrealized (tax) gain or loss (\$)	Investment return (\$)	Holding period
---------	------------------	--	------------------------	-----------------	--------------------------------	----------------------	------------------------------------	------------------------	----------------

VANGUARD SECTOR INDEX FD

INFORMATION TECH ETF

Symbol: VGT

Trade date: Apr 26, 10

EAI: \$189 Current yield: 0.93%

11,873.20 101.990 20,398.00 8,524.80 8,524.80 LT

Fixed income

Corporate bonds and notes

Prices are obtained from independent quotation bureaus that use computerized valuation formulas to calculate current values. Actual market values may vary and thus gains/losses may not be accurately reflected. Cost basis has been adjusted for accreted original issue discount (OID). Cost basis has been

automatically adjusted for amortization of bond premium using the constant yield method. If you have made a tax election to deduct the premium amortization on taxable debt securities, you may request UBS adjust cost basis for the bond premium amortization

Holding	Trade date	Total face value at maturity (\$)	Purchase price (\$)	Adjusted cost basis (\$)	Price on Oct 31 (\$)	Value on Oct 31 (\$)	Unrealized gain or loss (\$)	Holding period
---------	------------	-----------------------------------	---------------------	--------------------------	----------------------	----------------------	------------------------------	----------------

PRAXAIR INC

CALL@M-W T+25BP

RATE 04.625% MATURES 03/30/15

ACCRUED INTEREST \$192.71

CUSIP 74005PAR5

Moody: A2 S&P: A

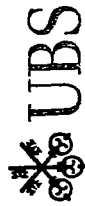
EAI: \$1,156 Current yield: 4.55%

Original cost basis: \$54,731.00

Jan 27, 10 50,000.000 100.804 50,402.09 101.662 50,831.00 428.91 LT



L



Business Services Account
October 2014

Account name:
Account number:

THE BENJAMIN FOUNDATION
TN 85786 SV
Your Financial Advisor:
SOUNDVIEW WEALTH MANAGEMENT
203-622-8666/800-628-8174

Your assets • Fixed income (continued)

Asset backed securities

Prices are obtained from independent quotation bureaus that use computerized valuation formulas to calculate current values. Actual market values may vary and thus gains/losses may not be accurately reflected. The cost basis for asset backed securities has been adjusted automatically for return of principal payments, and if issued at a discount, accreted original issue discount (OID).

Holding	Trade date	Quantity	Purchase price(\$)	Adjusted cost basis (\$)	Price on Oct 31 (\$)	Value on Oct 31 (\$)	Unrealized gain or loss (\$)	Holding period
---This information was unavailable---								
GNMA PL 001684M RATE 08.0000% MATURES 09/20/21 CURRENT PAR VALUE 212 ACCRUED INTEREST \$1.41 CUSIP 36202B2R5 EAI: \$17 Current yield: 7.97%		50,000.000			100.401	212.85		
GNMA PL 430294X RATE 07.0000% MATURES 10/15/27 CURRENT PAR VALUE 2,924 ACCRUED INTEREST \$17.05 CUSIP 36207E7F5 EAI: \$205 Current yield: 6.25%	Jan 11, 02	100,000.000	103.250	3,019.25	112.020	3,275.46	256.21	LT
GNMA PL 002728M RATE 06.0000% MATURES 03/20/29 CURRENT PAR VALUE 2,075 ACCRUED INTEREST \$10.37 CUSIP 36202DA50 EAI: \$125 Current yield: 5.30%	Apr 22, 03	100,000.000	105.000	2,178.65	113.230	2,349.52	170.87	LT
GNMA PL 002796M RATE 07.0000% MATURES 08/20/29 CURRENT PAR VALUE 142 ACCRUED INTEREST \$0.82 CUSIP 36202DC90 EAI: \$10 Current yield: 5.87%	Jan 11, 02	15,000.000	103.250	146.38	119.246	169.32	22.94	LT
GNMA PL 003150M RATE 06.5000% MATURES 10/20/31 CURRENT PAR VALUE 1,303 ACCRUED INTEREST \$7.05 CUSIP 36202DQ80 EAI: \$85 Current yield: 5.50%	Nov 06, 01	100,000.000	105.125	1,369.87	118.148	1,539.46	169.59	LT

continued next page



Business Services Account
October 2014

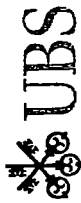
Account name:
Account number:
THE BENJAMIN FOUNDATION
TN 85786 SV

Your Financial Advisor:
SOUNDVIEW WEALTH MANAGEMENT
203-622-8666/800-628-8174

Your assets • Fixed income • Asset backed securities (continued)

Holding	Trade date	Quantity	Purchase price(\$)	Adjusted cost basis (\$)	Price on Oct 31 (\$)	Value on Oct 31 (\$)	Unrealized gain or loss (\$)	Holding period
GNMA PL 569801X								
RATE 06.0000% MATURES 05/15/32								
CURRENT PAR VALUE 650								
ACCRUED INTEREST \$3.25								
CUSIP 36200RAAO								
EAI: \$39 Current yield: 5.18%	Apr 22, 03	25,000.000	105.000	682.75	115.825	752.86	70.11	LT
GNMA PL 003239M								
RATE 06.5000% MATURES 05/20/32								
CURRENT PAR VALUE 804								
ACCRUED INTEREST \$4.34								
CUSIP 36202DS44								
EAI: \$52 Current yield: 5.48%	May 30, 02	50,097.000	102.200	821.21	118.718	954.49	133.28	LT
GNMA PL 003249M								
RATE 06.0000% MATURES 06/20/32								
CURRENT PAR VALUE 1,494								
ACCRUED INTEREST \$7.46								
CUSIP 36202DTE1								
EAI: \$90 Current yield: 5.21%	May 30, 02	50,000.000	100.500	1,501.27	115.245	1,721.76	220.49	LT
GNMA PL 003260M								
RATE 06.0000% MATURES 07/20/32								
CURRENT PAR VALUE 732								
ACCRUED INTEREST \$3.66								
CUSIP 36202DTR2								
EAI: \$44 Current yield: 5.21%	Apr 22, 03	25,000.000	104.250	763.18	115.246	843.60	80.42	LT
GNMA PL 003474M								
RATE 06.0000% MATURES 11/20/33								
CURRENT PAR VALUE 7,271								
ACCRUED INTEREST \$36.35								
CUSIP 36202D2F7								
EAI: \$436 Current yield: 5.21%	Nov 12, 03	100,000.000	104.000	7,561.71	115.233	8,378.59	816.88	LT
Total		615,097.000		\$18,044.27		\$20,197.91	\$1,940.79	
Total accrued interest: \$91.76								
Total estimated annual income: \$1,103								





Business Services Account
October 2014

Account name:
Account number:

THE BENJAMIN FOUNDATION
TN 85786 SV

Your Financial Advisor:
SOUNDVIEW WEALTH MANAGEMENT
203-622-8666/800-628-8174

Your assets ▶ Fixed income (continued)

Government securities

Prices are obtained from independent quotation bureaus that use computerized valuation formulas to calculate current values. Actual market values may vary and thus gains/losses may not be accurately reflected. Cost basis has been adjusted for accreted original issue discount (OID). Cost basis has been

automatically adjusted for amortization of bond premium using the constant yield method. If you have made a tax election to deduct the premium amortization on taxable debt securities, you may request that UBS adjust cost basis for the bond premium amortization.

Holding	Trade date	Quantity	Purchase price (\$)	Adjusted cost basis (\$)	Price on Oct 31 (\$)	Value on Oct 31 (\$)	Unrealized gain or loss (\$)	Holding period
CANADA GOVT B/E FOREIGN SECURITY RATE 02.000% MATURES 12/01/14 ACCRUED INTEREST \$739.12 ISIN CA135087YU24 EAI: \$886 Current yield: 2.00% CAD Exchange rate: 1.12745	Jun 21, 11	100,000.000	103.023	103,023.95	88.762	88,762.00	-14,261.95	LT

Your total assets

Cash	Cash and money balances	Value on Oct 31 (\$)	Percentage of your account	Cost basis (\$)	Estimated annual income (\$)	Unrealized gain or loss (\$)
Equities	* Common stock	437,214.47	36.91%	437,214.47		
	Closed end funds & Exchange traded products	566,114.96		311,780.51	14,596.00	219,426.45
	Total equities	20,398.00		11,873.20	189.00	8,524.80
Fixed income	Corporate bonds and notes	586,512.96	49.51%	323,653.71	14,785.00	227,951.25
	* Asset backed securities	50,831.00		50,402.09	1,156.00	428.91
	Government securities	20,197.91		18,044.27	1,103.00	1,940.79
	Total accrued interest	88,762.00		103,023.95	886.00	-14,261.95
	Total fixed income	1,023.59				
Total		160,814.50	13.58%	171,470.31	3,145.00	-11,892.25
		\$1,184,541.93	100.00%	\$932,338.49	\$17,930.00	\$216,059.00

* Missing cost basis information.

11.35 AM

06/11/15

Bennie & Martha Benjamin Foundation, Inc. Journal

November 2013 through October 2014

Date	Num	Memo	Account	Debit	Credit
11/01/2013	AJE 7 CPA	To record installment payback of prior grant To record installment payback of prior grant	1880 Loan Receivable - Fyama Wenner 2600 Deferred Grant Income	60,000 00 60,000 00	60,000 00 60,000 00
10/30/2014	AJE 2 CPA	Rec Nov-13 to Oct -14 Activity Rec Nov-13 to Oct -14 Activity Rec Nov-13 to Oct -14 Activity Rec Nov-13 to Oct -14 Activity Rec Nov-13 to Oct -14 Activity Rec Nov-13 to Oct -14 Activity Rec Nov-13 to Oct -14 Activity	7010 Interest Income 7020 Dividend Income 7070 Return of Capital/Principal 6210 Investment Management Fees 6210 Investment Management Fees 8200 Tax Expense - Foreign Paid 1250 Cash UBS Investmt Acct/RMA MM	6,399 77 13,571 02 4,112 44 6,194 80 51 50 256 22 17,580 71	
10/30/2014	AJE 3 CPA	Bought Boeing Co 100 sh 8/1/14 Bought Boeing Co 100 sh 8/1/14 Bought DOW Chemical 250 sh 10/3/14 Bought DOW Chemical 250 sh 10/3/14 Bought Helmench & Payne Inc 125 sh 06/12/14 Bought Helmench & Payne Inc 125 sh 06/12/14 Bought Packing Corp of America 200 sh 10/03/14 Bought Packing Corp of America 200 sh 10/03/14	1540 Investments-PW Common Stock 1250 Cash UBS Investmt Acct/RMA MM 1540 Investments-PW Common Stock 1250 Cash UBS Investmt Acct/RMA MM 1540 Investments-PW Common Stock 1250 Cash UBS Investmt Acct/RMA MM 1540 Investments-PW Common Stock 1250 Cash UBS Investmt Acct/RMA MM	12,103 25 12,717 25 14,134 00 12,840 40 51,794 90	12,103 25 12,717 25 14,134 00 12,840 40 51,794 90
10/30/2014	AJE 4 CPA	Sold Utilities Sector SPDR 12/12/13 Sold Utilities Sector SPDR 12/12/13 Sold Utilities Sector SPDR 12/12/13 Sold BCE Inc 300 sh 1/28/14 Sold BCE Inc 300 sh 1/28/14 Sold BCE Inc 300 sh 1/28/14 Sold Crimson Wine Gr Ltd 50 sh 1/15/14 Sold Crimson Wine Gr Ltd 50 sh 1/15/14 Sold Crimson Wine Gr Ltd 50 sh 1/15/14 Sold SPDR Gold Trust 50 sh 1/15/14 Sold SPDR Gold Trust 50 sh 1/15/14 Sold SPDR Gold Trust 50 sh 1/15/14 Sold Duke Energy 200 sh 1/29/14 Sold Duke Energy 200 sh 1/29/14 Sold Duke Energy 200 sh 1/29/14 Sold Baxter Intl Bond 3/1/14 Sold Baxter Intl Bond 3/1/14 Sold CDK Global Inc 333 sh 10/1/14 Sold CDK Global Inc 333 sh 10/1/14 Sold CDK Global Inc 333 sh 10/1/14	1250 Cash UBS Investmt Acct/RMA MM 1540 Investments-PW Common Stock 7050 Gain on Sale of Assets 1250 Cash UBS Investmt Acct/RMA MM 1540 Investments-PW Common Stock 8050 Loss on Sale of Assets 1250 Cash UBS Investmt Acct/RMA MM 1540 Investments-PW Common Stock 7050 Gain on Sale of Assets 1250 Cash UBS Investmt Acct/RMA MM 1540 Investments-PW Common Stock 7050 Gain on Sale of Assets 1250 Cash UBS Investmt Acct/RMA MM 1540 Investments-PW Common Stock 7050 Gain on Sale of Assets 1250 Cash UBS Investmt Acct/RMA MM 1420 Investments-PW-Corp Bonds 1250 Cash UBS Investmt Acct/RMA MM 1540 Investments-PW Common Stock 7050 Gain on Sale of Assets	11,259 06 9,383 33 1,875 73 12,358 07 568 93 417 99 5,970 90 13,756 38 50,000 00 10,624 80 3,131 58 50,000 00 10 20 5 20 5 00	9,383 33 1,875 73 12,927 00 272 03 145 96 5,301 41 669 49 10,624 80 3,131 58 50,000 00 5 20 5 00
10/30/2014	AJE 5 CPA	Reconcile to 10/31/2014 UBS Stmt Reconcile to 10/31/2014 UBS Stmt Reconcile to 10/31/2014 UBS Stmt Reconcile to 10/31/2014 UBS Stmt	7070 Return of Capital/Principal 1720 Investments-PW-GNMA/FMC 8050 Loss on Sale of Assets 1420 Investments-PW-Corp Bonds	4,112 44 2,836 50 6,948 94	4,112 44 2,836 50 6,948 94
10/30/2014	AJE 6 CPA	To adjust & reconcile Wenner Grant Loan Rec To adjust & reconcile Wenner Grant Loan Rec To adjust & reconcile Wenner Grant Loan Rec To adjust & reconcile Wenner Grant Loan Rec	1880 Loan Receivable - Fyama Wenner 7010 Interest Income 2600 Deferred Grant Income 4200 Grant Recovery Income	5,621 77 11,719 51 17,341 28	5,621 77 11,719 51 17,341 28
10/31/2014	AJE 8 CPA	To record tax refund receivable To record tax refund receivable	1900 Taxes Receivable 8100 Federal Income Tax	430 00 430 00	430 00 430 00
TOTAL				254,939.88	254,939.88

Tina- you may need to create some new accounts. Please call with any questions.

10/31/14

11:36 AM

06/11/15

Bennie & Martha Benjamin Foundation, Inc.

Journal

October 31, 2013

Date	Num	Memo	Account	Debit	Credit
10/31/2013	AJE 1 CPA	To Reconcile TY 2012 Equity	1250 Cash UBS Investmt Acct/RMA MM	294,060 15	
		To Reconcile TY 2012 Equity	1420 Investments-PW-Corp Bonds		119,470 94
		To Reconcile TY 2012 Equity	1540 Investments-PW Common Stock		7,020 74
		To Reconcile TY 2012 Equity	1720 Investments-PW-GNMA/FMC		6,743 83
		To Reconcile TY 2012 Equity	1740 Investments PW-U S Treasury		148,921 88
		To Reconcile TY 2012 Equity	6210 Investment Management Fees	5,873 81	
		To Reconcile TY 2012 Equity	6245 Operating Expenses	469 61	
		To Reconcile TY 2012 Equity	7010 Interest Income		11,045 04
		To Reconcile TY 2012 Equity	7020 Dividend Income		15,335 40
		To Reconcile TY 2012 Equity	7025 Royalties		740 48
		To Reconcile TY 2012 Equity	7030 Other Income	159 58	
		To Reconcile TY 2012 Equity	7050 Gain on Sale of Assets		2,469 55
		To Reconcile TY 2012 Equity	8010 Other Expenses		159 58
		To Reconcile TY 2012 Equity	8050 Loss on Sale of Assets	10,267 08	
		To Reconcile TY 2012 Equity	8100 Federal Income Tax	1,077 21	
				311,907 44	311,907 44
				<u>311,907.44</u>	<u>311,907.44</u>
TOTAL					

Tina, please enter this Journal entry into your QuickBooks file. Please call with any questions.

10/31/13

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 UTILITIES SECTOR SPDR		P	12/23/09	12/12/13
b BCE INC		P	11/20/12	01/28/14
c CRIMSON WINE GROUP LTD		P	01/31/05	01/15/14
d SPDR GOLD TRUST		P	12/23/09	01/15/14
e DUKE ENERGY		P	10/19/10	01/29/14
f BAXTER INTL BOND		P	01/27/10	03/01/14
g CDK GLOBAL INC		P	10/01/10	10/01/14
h				
i				
j				
k				
l				
m				
n				
o				

(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 11,259.		9,383.	1,876.
b 12,358.		12,927.	-569.
c 418.		272.	146.
d 5,971.		5,301.	670.
e 13,756.		10,625.	3,131.
f 50,000.		52,837.	-2,837.
g 10.		5.	5.
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			1,876.
b			-569.
c			146.
d			670.
e			3,131.
f			-2,837.
g			5.
h			
i			
j			
k			
l			
m			
n			
o			

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	2,422.
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). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - SCHNEIDER REGIONAL MEDICAL CENTER

NURSING EXTERNSHIP PROGRAM 2013,EQUIPMENT UPGRADE LABOUR AND DELIVERY ,

HOSPICE & PALLITATIVE NURSE ASSOCIATION - TUITION

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

Department of the Treasury
Internal Revenue Service

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

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

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

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

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

Part I only ☐

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

Type or print	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number
	THE BENNIE & MARTHA BENJAMIN FOUNDATION, INC	Employer identification number (EIN) or 13-3555717
File by the due date for filing. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions. C/O D.A. BEALE, 301 W. ATLANTIC AVE., NO. 0-5	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. DELRAY BEACH, FL 33444	

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

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

DAVID A BEALE

- The books are in the care of ► **55 SE 2ND AVENUE #301 - DELRAY BEACH, FL 33444**
Telephone No. ► **561-243-1477** Fax No. ►

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

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **JUNE 15, 2015**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☐ calendar year _____ or
- ☒ tax year beginning **NOV 1, 2013**, and ending **OCT 31, 2014**

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

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	860.
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.	3b	\$	860.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

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

- 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.	Employer identification number (EIN) or
	THE BENNIE & MARTHA BENJAMIN FOUNDATION, INC	13-3555717
	Number, street, and room or suite no. If a P.O. box, see instructions	Social security number (SSN)
	C/O D.A. BEALE, 301 W. ATLANTIC AVE., NO. 05	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	DELRAY BEACH, FL 33444	

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.

DAVID A BEALE

- The books are in the care of **301 W ATLANTIC AVE, STE 05 - DELRAY BEACH, FL 33444**
Telephone No. **561-243-1477** 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.

- I request an additional 3-month extension of time until **SEPTEMBER 15, 2015.**
- For calendar year _____, or other tax year beginning **NOV 1, 2013**, and ending **OCT 31, 2014**.
- If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period
- State in detail why you need the extension

CERTAIN REQUIRED INFORMATION THAT IS NEEDED FOR A COMPLETE AND ACCURATE INCOME TAX RETURN IS STILL NOT ON HAND.

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	\$	430.
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	\$	430.
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 Christa Rose Scalapino Title CPADate 6/3/15

Form 8868 (Rev. 1-2014)