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

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OMB No 1545-0052

2013

For calendar year 2013, or tax year beginning 11/01, 2013, and ending 10/31, 2014

JOSEPH ALEXANDER FOUNDATION, INC.
PO BOX 433
FT WASHINGTON, PA 19034-0433

A Employer identification number
51-0175951B Telephone number (see the instructions)
813-902-2691

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, column (c), line 16) \$ 16,141,544.
J Accounting method: ☐ Cash ☒ Accrual
☐ Other (specify) _____ (Part I, column (d) must be on cash basis)

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here. ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses

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

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

REVENUE	1	Contributions, gifts, grants, etc., received (att sch)				
	2	Ch ☒ if the foundn is not req to att Sch B				
	3	Interest on savings and temporary cash investments	20,118.	20,118.		
	4	Dividends and interest from securities	379,277.	379,277.		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain/(loss) from sale of assets not on line 10	336,568.			
	b	Gross sales price for all assets on line 6a	1,943,076.			
	7	Capital gain net income (from Part IV, line 2)		336,568.		
	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/(loss) (att sch)					
11	Other income (attach schedule)					
12	Total. Add lines 1 through 11	735,963.	735,963.	0.		
EXPENSES	13	Compensation of officers, directors, trustees, etc	57,000.	8,550.		48,450.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits	12,500.	1,875.		10,625.
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach sch) SEE ST 1	18,500.	2,775.		15,725.
	c	Other prof fees (attach sch)				
	17	Interest				
	18	Depreciation (attach schedule) (see instrs) SEE STM 2	21,692.	9,336.		12,356.
	19	Depreciation (attach schedule) and depletion				
	20	Charity				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
23	Other expenses (attach schedule) SEE STATEMENT 3	116,301.	111,901.		4,400.	
24	Total operating and administrative expenses. Add lines 13 through 23	225,993.	134,437.		91,556.	
25	Contributions, gifts, grants paid PART XV	625,500.			625,500.	
26	Total expenses and disbursements. Add lines 24 and 25	851,493.	134,437.	0.	717,056.	
27	Subtract line 26 from line 12:					
a	Excess of revenue over expenses and disbursements	-115,530.				
b	Net investment income (if negative, enter -0)		601,526.			
c	Adjusted net income (if negative, enter -0)			0.		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
ASSETS	1	Cash — non-interest-bearing		52,814.	57,861.	57,861.
	2	Savings and temporary cash investments		1,663,854.	1,216,662.	1,216,662.
	3	Accounts receivable				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach sch) ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments — U.S. and state government obligations (attach schedule) STATEMENT 4		319,122.	318,651.	318,651.
	b	Investments — corporate stock (attach schedule) STATEMENT 5		13,159,160.	14,544,190.	14,544,190.
	c	Investments — corporate bonds (attach schedule)		98,750.		
	11	Investments — land, buildings, and equipment: basis ▶				
	Less: accumulated depreciation (attach schedule) ▶					
12	Investments — mortgage loans					
13	Investments — other (attach schedule)					
14	Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation (attach schedule) ▶					
15	Other assets (describe ▶ SEE STATEMENT 6)		9,291.	4,180.	4,180.	
16	Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)		15,302,991.	16,141,544.	16,141,544.	
LIABILITIES	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, & other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶ SEE STATEMENT 7)		83,697.	116,947.	
	23	Total liabilities (add lines 17 through 22)		83,697.	116,947.	
NET ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ☐					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ☒					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, building, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds		15,219,294.	16,024,597.	
	30	Total net assets or fund balances (see instructions)		15,219,294.	16,024,597.	
	31	Total liabilities and net assets/fund balances (see instructions)		15,302,991.	16,141,544.	

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	15,219,294.
2	Enter amount from Part I, line 27a	2	-115,530.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	946,243.
4	Add lines 1, 2, and 3	4	16,050,007.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 9	5	25,410.
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	16,024,597.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a SEE STATEMENT 10				
b				
c				
d				
e				

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

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

2 Capital gain net income or (net capital loss).	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2	336,568.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):				
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	0.

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 (column (b) divided by column (c))
2012	809,711.	14,370,255.	0.056346
2011	812,089.	13,739,739.	0.059105
2010	794,240.	14,094,529.	0.056351
2009	805,572.	14,405,506.	0.055921
2008	798,786.	14,542,640.	0.054927

2 Total of line 1, column (d)	2	0.282650
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.056530
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	15,121,179.
5 Multiply line 4 by line 3	5	854,800.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,015.
7 Add lines 5 and 6	7	860,815.
8 Enter qualifying distributions from Part XII, line 4	8	717,056.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1 a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter 'N/A' on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary – see instrs)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	12,031.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (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	12,031.
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	12,031.
6 Credits/Payments:			
a 2013 estimated tax pmts and 2012 overpayment credited to 2013	6a	4,221.	
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	4,221.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ 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	7,810.	
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
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>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.</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ 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? <i>If 'Yes,' attach a detailed description of the activities</i>		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? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T.</i>		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? <i>If 'Yes,' complete Part II, column (c), and Part XIV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) NY		
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? <i>If 'No,' attach explanation</i>	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)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

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Form 990-PF (2013)

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address <u>N/A</u>				
14	The books are in care of <u>JOSEPH ALEXANDER FOUNDATION</u> Telephone no. <u>813-902-2691</u>			
Located at <u>PO BOX 433 FT WASHINGTON PA</u> ZIP + 4 <u>19034-0433</u>				
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	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?	16	Yes	No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If 'Yes,' enter the name of the foreign country				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
1 a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6)	Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
1 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 ☐	1 b	N/A
1 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?	1 c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☒ No If 'Yes,' list the years <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>		
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)	2 b	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 <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>		
3 a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b	If 'Yes,' did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)	3 b	N/A
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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?	4 b	X

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Form 990-PF (2013)

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5 a** During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?Organizations relying on a current notice regarding disaster assistance check here ☐**5 b** N/A**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

N/A ☐ Yes ☐ No**6 a** 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? ☐ Yes ☒ No

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

6 b X**7 a** 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? ☐ Yes ☒ No**7 b** N/A**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 11		57,000.	0.	0.

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

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

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

0

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

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

Total number of others receiving over \$50,000 for professional services 0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 BAR ILAN UNIVERSITY LOCATED IN NEW YORK, NEW YORK. SCHOOL OF MEDICINE FOR RESEARCH	50,000.
2 WESTERN WALL HERITAGE FOUNDATION, NEW YORK, NY; EXCAVATION ACTIVITIES AND MUSEUM EXHIBITING HISTORICAL AND RELIGIOUS ARTIFACTS	50,000.
3 YESHIVA UNIVERSITY, NEW YORK, NY. FUNDING FOR GENERAL PURPOSES	50,000.
4 GENESIS FOUNDATION, MARLBORO, NEW JERSEY. PROVIDE SCHOOL SCHOLARSHIPS	50,000.

Part IX-B Summary of Program-Related Investments (see instructions)

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

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Form 990-PF (2013)

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	13,851,675.
b Average of monthly cash balances	1b	1,495,596.
c Fair market value of all other assets (see instructions).	1c	4,180.
d Total (add lines 1a, b, and c)	1d	15,351,451.
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	15,351,451.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	230,272.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	15,121,179.
6 Minimum investment return. Enter 5% of line 5	6	756,059.

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	756,059.
2a Tax on investment income for 2013 from Part VI, line 5	2a	12,031.
b Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	12,031.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	744,028.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	744,028.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	744,028.

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	717,056.
b Program-related investments — total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	717,056.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	717,056.

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				744,028.
2 Undistributed income, if any, as of the end of 2013:				
a Enter amount for 2012 only			0.	
b Total for prior years: 20 , 20 , 20		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008	12,962.			
b From 2009	89,203.			
c From 2010	92,262.			
d From 2011	128,216.			
e From 2012	94,466.			
f Total of lines 3a through e	417,109.			
4 Qualifying distributions for 2013 from Part XII, line 4. ▶ \$ 717,056.				
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				717,056.
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))	26,972.			26,972.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	390,137.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount — see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	390,137.			
10 Analysis of line 9:				
a Excess from 2009	75,193.			
b Excess from 2010	92,262.			
c Excess from 2011	128,216.			
d Excess from 2012	94,466.			
e Excess from 2013				

BAA

N/A

- (4) Gross investment income.

[illegible]

Form 990-PF (2013)

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				
SEE SCHEDULE OF GRANTS PAID SEE SCHEDULE OF GRANTS PAID SEE SCH ATTACHED, PA 19034	NONE	CHAR	RELIGIOUS	22,500.
SEE SCHEDULE OF GRANTS PAID SEE SCHEDULE OF GRANTS PAID SEE SCH ATTACHED, PA 19034	NONE	CHAR	MEDICAL	25,000.
SEE SCHEDULE OF GRANTS PAID SEE SCHEDULE OF GRANTS PAID SEE SCH ATTACHED, PA 19034	NONE	CHAR	EDUCATIONAL	202,500.
SEE SCHEDULE OF GRANTS PAID SEE SCHEDULE OF GRANTS PAID SEE SCH ATTACHED, PA 19034	NONE	CHAR	CHARITABLE	375,500.
Total			3 a	625,500.
b Approved for future payment				
Total			3 b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a					
b					
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	20,118.	
4 Dividends and interest from securities			14	379,277.	
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					
8 Gain or (loss) from sales of assets other than inventory			18	336,568.	
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)				735,963.	
13 Total. Add line 12, columns (b), (d), and (e)				13	735,963.

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

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

[illegible]

2013

FEDERAL STATEMENTS

PAGE 1

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JOSEPH ALEXANDER FOUNDATION, INC.

51-0175951

1/15/15

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STATEMENT 1
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
JOEL POPKIN & CO.	\$ 18,500.	\$ 2,775.		\$ 15,725.
TOTAL	<u>\$ 18,500.</u>	<u>\$ 2,775.</u>	<u>\$ 0.</u>	<u>\$ 15,725.</u>

STATEMENT 2
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAXES-CURRENT PROVISION				
	\$ 10,403.	\$ 1,561.		\$ 8,842.
FOREIGN TAXES PAID.....	7,155.	7,155.		
PAYROLL TAXES....	4,134.	620.		3,514.
TOTAL	<u>\$ 21,692.</u>	<u>\$ 9,336.</u>	<u>\$ 0.</u>	<u>\$ 12,356.</u>

STATEMENT 3
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT BROKER FEES..	\$ 111,124.	\$ 111,124.		
NYS AND PA FILING FEES...	750.	113.		\$ 637.
OFFICE EXPENSES	4,427.	664.		3,763.
TOTAL	<u>\$ 116,301.</u>	<u>\$ 111,901.</u>	<u>\$ 0.</u>	<u>\$ 4,400.</u>

STATEMENT 4
FORM 990-PF, PART II, LINE 10A
INVESTMENTS - U.S. AND STATE GOVERNMENT OBLIGATIONS

U.S. GOVERNMENT OBLIGATIONS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE SCHEDULE -GOVERNMENT OBLIGATIONS	MKT VAL	\$ 318,651.	\$ 318,651.
		\$ 318,651.	\$ 318,651.
TOTAL		<u>\$ 318,651.</u>	<u>\$ 318,651.</u>

2013

FEDERAL STATEMENTS

PAGE 2

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51-0175951

1/15/15

10:46AM

STATEMENT 5
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE SCHEDULE - COMMON STOCKS	MKT VAL	\$ 14,544,190.	\$ 14,544,190.
	TOTAL	<u>\$ 14,544,190.</u>	<u>\$ 14,544,190.</u>

STATEMENT 6
FORM 990-PF, PART II, LINE 15
OTHER ASSETS

	BOOK VALUE	FAIR MARKET VALUE
ACCRUED INTEREST RECEIVABLE		\$ 4,180.
ACCRUED INTEREST RECEIVABLE		\$ 4,180.
TOTAL	<u>\$ 4,180.</u>	<u>\$ 4,180.</u>

STATEMENT 7
FORM 990-PF, PART II, LINE 22
OTHER LIABILITIES

DEFERRED TAXES PAYABLE	\$ 109,107.
TOTAL	<u>\$ 116,947.</u>

STATEMENT 8
FORM 990-PF, PART III, LINE 3
OTHER INCREASES

NET UNREALIZED GAINS OR LOSSES ON INVESTMENTS	\$ 946,243.
TOTAL	<u>\$ 946,243.</u>

STATEMENT 9
FORM 990-PF, PART III, LINE 5
OTHER DECREASES

DEFERRED FEDERAL EXCISE TAX	\$ 25,410.
TOTAL	<u>\$ 25,410.</u>

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STATEMENT 10
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	SEE SCHEDULE ATTACHED- M LYNCH 04004	PURCHASED	VARIOUS	VARIOUS
2	SEE SCHEDULE ATTACHED - M LYNCH 02409	PURCHASED	VARIOUS	VARIOUS
3	SEE SCHEDULE ATTACHED - M LYNCH 02410	PURCHASED	VARIOUS	VARIOUS
4	SEE SCHEDULE ATTACHED - M LYNCH 02319	PURCHASED	VARIOUS	VARIOUS
5	SEE SCHEDULE ATTACHED - NEUBERGER BERMAN	PURCHASED	VARIOUS	VARIOUS
6	SEE SCHEDULE ATTACHED - NEUBERGER BERMAN	PURCHASED	VARIOUS	VARIOUS

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	603,894.		582,376.	21,518.				\$ 21,518.
2	30,141.		28,529.	1,612.				1,612.
3	49,227.		46,991.	2,236.				2,236.
4	51,391.		46,176.	5,215.				5,215.
5	864,691.		686,587.	178,104.				178,104.
6	343,732.		215,849.	127,883.				127,883.
							TOTAL	\$ 336,568.

STATEMENT 11
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
ALEXANDER MACKLER PO BOX 433 FT WASHINGTON, PA 19034-0433	DIRECTOR 1.00	\$ 1,400.	\$ 0.	\$ 0.
JESSICA ROSENBERG PO BOX 433 FT WASHINGTON, PA 19034-0433	DIRECTOR 1.00	1,400.	0.	0.
JUSTIN WINDHEIM PO BOX 433 FT WASHINGTON, PA 19034-0433	DIRECTOR 1.00	1,400.	0.	0.
HARVEY MACKLER PO BOX 433 FT WASHINGTON, PA 19034-0433	PRES/DIRECTOR 10.00	26,400.	0.	0.
RANDI WINDHEIM PO BOX 433 FT WASHINGTON, PA 19034-0433	SECY/DIRECTOR 10.00	26,400.	0.	0.
	TOTAL	\$ 57,000.	\$ 0.	\$ 0.

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STATEMENT 12
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:	CHARITABLE
NAME:	HARVEY MACKLER
CARE OF:	JOSEPH ALEXANDER FOUNDATION, INC.
STREET ADDRESS:	PO BOX 433
CITY, STATE, ZIP CODE:	FT WASHINGTON, PA 19034-0433
TELEPHONE:	813-902-2691
E-MAIL ADDRESS:	N/A
FORM AND CONTENT:	THE APPLICATION SHOULD BE SUBMITTED THROUGH A WRITTEN APPLICATION. THOSE DETAILS THAT RELATE TO THE SPECIFIC REQUIRED CONTENT OF THE APPLICATION CAN BE OBTAINED BY CONTACTING THE FOUNDATION.
SUBMISSION DEADLINES:	NONE
RESTRICTIONS ON AWARDS:	THERE ARE NO RESTRICTIONS ON LIMITATIONS OR AWARDS, SUCH AS BY TYPE OR LOCATION, ONE'S CHARITABLE FIELD OR ENDEAVOR, THE TYPE OF THE APPLYING INSTITUTION OR ANY OTHER TYPE OF FACTOR. ACCORDINGLY, AS THERE ARE NO LIMITATIONS OR RESTRICTIONS INHERENT IN THE PROCESS, THE FOUNDATION CAN AFFIRM TO THE FACT THAT THERE IS NO DISCRIMINATION OF ANY KIND RELATING TO THE DECISIONS MADE BY THE FOUNDATION REGARDING THE APPROVAL PROCESS FOR THE GRANTING OF AWARDS, GRANTS OR CONTRIBUTIONS.

SCHEDULE - CAPITAL TRANSACTIONS

NAME JOSEPH ALEXANDER FOUNDATION INC YEAR ENDED 10-31-14

SECURITY SOLD	NO. OF SHARES OR P.V.	DATE		SALES PRICE	COST OR OTHER BASIS	SHORT TERM GAIN OR (LOSS)	LONG TERM GAIN OR (LOSS)	STATE TRANSFER TAXES
		ACQ.	SOLD					
McKesson Corp	2100	8/2/13	9/3/14	343732	215849	127883		
AMGEN Corp	800	8/14/14	8/31/14	92528	46711		45817	
POTASH	25	11/1/13	11/30/14	897	1056		(159)	
POTASH	5150	11/1/13	11/1/14	188277	217535		(29258)	
WELLS FARGO	500	8/7/10	11/1/14	25500	16065		9435	
WELLS FARGO	2600	8/7/10	11/1/14	135606	83539		52067	
CE INDUSTRIES	1100	8/27/13	9/2/14	300037	915482		84555	
EMC Corp	4100	8/1/13	9/24/14	121846	106199		15647	
TOTEL Novor Corp				1208423	902436	127883	178104	
COLOMBUS SEC HS CD	100000	11/1/12	11/1/13	100000	100000			
BANK OF MONTANA CD	120000	11/1/12	11/1/13	120000	120000			
BANK OF INDIAN CD	125000	11/1/12	11/1/13	125000	125000			
BANK OF BARODA AD	100000	11/1/12	11/1/13	100000	100000			
SLB Corp - BOND	100000	8/1/14	8/31/14	100000	100000			
TARGET Corp	1000	8/1/14	8/31/14	37376	37376			
TOTEL 11/1/12-11/1/14				603894	582376		21518	
TOTEL 11/1/14-11/1/14				32141	28529	1612		
TOTEL 11/1/14-11/1/14				49227	46991	2236		
TOTEL 11/1/14-11/1/14				51391	46176	5215		
TOTEL 11/1/14-11/1/14				1943076	1606508	136946	199616	
TOTALS								
NET-GAIN-OR-(LOSS)								
NET SHORT-TERM GAIN OR (LOSS)								
NET LONG-TERM GAIN OR (LOSS)								

JOSEPH ALEXANDER FOUNDATION, INC.
SUMMARY OF GRANTS PAID
YEAR ENDED OCTOBER 31, 2014

<u>Recipient</u>	<u>Purpose</u>	<u>Amount</u>
<u>Charitable Grants</u>		
ALS Association of Philadelphia Ambler, PA	Unrestricted	30,000
ALS Association of New York New York, NY	Unrestricted	5,000
Alzheimers Assn New York, NY	Unrestricted	5,000
American-Israel Friendship League New York, NY	Youth Exchange Program	15,000
American Friends of Beit Issie Shapiro	Unrestricted	5,000
American Friends of Hebrew University New York, NY	Unrestricted	10,000
American Friends of Israel Museum	Unrestricted	10,000
American Museum of Natural History New York, NY	Unrestricted	2,500
American Society for Yad Vashem New York, NY	Unrestricted	2,500
Big Brothers Big Sisters Levittown, NY	Unrestricted	2,500
Center for Jewish History New York, NY	Unrestricted	10,000
Chamah New York, NY	Unrestricted	35,000

JOSEPH ALEXANDER FOUNDATION, INC.
SUMMARY OF GRANTS PAID
YEAR ENDED OCTOBER 31, 2014

<u>Recipient</u>	<u>Purpose</u>	<u>Amount</u>
Cystic Fibrosis Broomall, PA	Unrestricted	5,000
Dorot New York, NY	Unrestricted	10,000
Down Syndrome of Central Florida Winter Park, FL	Unrestricted	2,500
ELEM/Youth in Distress New York, NY	Unrestricted	7,500
Federation of Jewish Men's Clubs New York, NY	Unrestricted	5,000
Fegs Health & Human Services New York, NY	Unrestricted	1,500
Friends of IR David Foundation New York, NY	Unrestricted	15,000
Guiding Eyes for the Blind	Unrestricted	1,500
Guess Who's Coming to Shabbos	Unrestricted	2,500
Hillel-University of Delaware Newark, DE	Unrestricted	10,000
Hillels of Florida SunCoast Tampa, FL	Unrestricted	2,500
International Center for Photography New York, NY	Unrestricted	5,000
Israel Guide Dog Center New York, NY	Unrestricted	2,500

JOSEPH ALEXANDER FOUNDATION, INC.
SUMMARY OF GRANTS PAID
YEAR ENDED OCTOBER 31, 2014

<u>Recipient</u>	<u>Purpose</u>	<u>Amount</u>
Jewish Braille Institute New York, NY	Unrestricted	15,000
Jewish Foundation for the Righteous New York, NY	Unrestricted	5,000
Jewish Museum New York, NY	Unrestricted	10,000
Keren Or New York, NY	Unrestricted	5,000
Kids 1st Fund Tallahassee, FL	Unrestricted	5,000
Lighthouse International New York, NY	Unrestricted	5,000
Madison Square Boys & Girls Club New York, NY	Unrestricted	2,500
National Museum of American Jewish History New York, NY	Unrestricted	5,000
New York Glaucoma Research Inst New York, NY	Unrestricted	5,000
OHEL Children's Home Brooklyn, NY	Unrestricted	10,000
Ohr Torah Stone New York, NY	Unrestricted	15,000
Pediatric Cancer Foundation Mamaroneck, NY	Unrestricted	2,500

JOSEPH ALEXANDER FOUNDATION, INC.
SUMMARY OF GRANTS PAID
YEAR ENDED OCTOBER 31, 2014

<u>Recipient</u>	<u>Purpose</u>	<u>Amount</u>
Reading Reform Foundation New York, NY	Unrestricted	10,000
School for Children with Hidden Intelligence New York, NY	Unrestricted	2,500
Susan G. Komen Philadelphia, PA	Unrestricted	10,000
USC Shoah Fdn Los Angeles, CA	Unrestricted	10,000
Western Wall Heritage Foundation New York, NY	Excavations and Museum	50,000
Yad Sarah New York, NY	Unrestricted	<u>5,000</u>
Total Charitable Grants		<u><u>\$ 375,500</u></u>

JOSEPH ALEXANDER FOUNDATION, INC.
SUMMARY OF GRANTS PAID
YEAR ENDED OCTOBER 31, 2014

<u>Recipient</u>	<u>Purpose</u>	<u>Amount</u>
<u>Educational</u>		
Bar Ilan University New York, NY	Ruth Rackman Center	\$ 50,000
Genesis Foundation Marlboro, NJ	Scholarship	50,000
JTS New York, NY	Unrestricted	5,000
Marshall Wythe Law Foundation Williamsburg, VA	Unrestricted	10,000
Marymount Manhattan College New York, NY	Unrestricted	2,500
PPEF Irving, TX	Unrestricted	25,000
Upper Dublin Education fdn 4c Maple Glen, PA	Unrestricted	10,000
Yeshiva University New York, NY	Science Education	<u>50,000</u>
Total Educational Grants		<u><u>\$ 202,500</u></u>

JOSEPH ALEXANDER FOUNDATION, INC.
SUMMARY OF GRANTS PAID
YEAR ENDED OCTOBER 31, 2014

<u>Recipient</u>	<u>Purpose</u>	<u>Amount</u>
<u>Religious</u>		
Friends of Jewish Chapel Annapolis, MD	Unrestricted	\$ 2,500
Temple Ner Tamid Bloomfield, NJ	Unrestricted	10,000
Wilshire Blvd Temple Los Angeles, CA	Unrestricted	<u>10,000</u>
Total Religious Grants		<u>\$ 22,500</u>
 <u>Medical</u>		
Albert Einstein College of Medicine New York, NY	Optic Nerve Research	<u>\$ 25,000</u>
Total Medical Grants		<u>\$ 25,000</u>
 Grants Recapitulation:		
Charitable		\$ 375,500
Educational		202,500
Religious		22,500
Medical		<u>25,000</u>
Total Grants Paid		<u>\$ 625,500</u>