Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter Social Security numbers on this form as it may be made public.

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning DEC 1, 2013 , and ending NOV 30, 2014

Name of foundation
IRA & MARYLOU ALPERT FOUNDATION

A Employer identification number
13-3406434

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

Room/suite

B Telephone number
212-372-1000

City or town, state or province, country, and ZIP or foreign postal code
YORKTOWN, NY 10598

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 change

D 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 foundation

E 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)* ▶$ 140,368.

J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis)

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

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	3,415.		N/A	
2 Check ▶ ☒ if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	213.	213.		STATEMENT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	10,702.			
b Gross sales price for all assets on line 6a 48,269.				
7 Capital gain net income (from Part IV, line 2)		10,702.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income				
12 **Total.** Add lines 1 through 11	14,330.	10,915.		
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc	0.	0.		0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees				
b Accounting fees STMT 2	3,390.	848.		2,542.
c Other professional fees				
17 Interest				
18 Taxes				
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses STMT 3	26.	1.		25.
24 **Total operating and administrative expenses.** Add lines 13 through 23	3,416.	849.		2,567.
25 Contributions, gifts, grants paid	5,750.			5,750.
26 **Total expenses and disbursements.** Add lines 24 and 25	9,166.	849.		8,317.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	5,164.			
b **Net investment income** (if negative, enter -0-)		10,066.		
c **Adjusted net income** (if negative, enter -0-)			N/A	

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Form **990-PF** (2013)

a

		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	32,390.	33,641.	33,641.
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons			
	7	Other notes and loans receivable ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 4	104,190.	108,103.	106,727.
	c	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation ▶			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	136,580.	141,744.	140,368.
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here** ▶ ☐ **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	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	136,580.	141,744.	
	30	**Total net assets or fund balances**	136,580.	141,744.	
	31	**Total liabilities and net assets/fund balances**	136,580.	141,744.	

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	136,580.
2	Enter amount from Part I, line 27a	2	5,164.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	141,744.
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	141,744.

Form **990-PF** (2013)

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	GGHC - SEE SCHEDULE 2	P	VARIOUS	11/30/14
b	CASH IN LIEU	P	VARIOUS	09/23/14
c	35 SHS MALIBU BOATS INC	P	VARIOUS	02/05/14
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	47,767.		37,077.	10,690.
b	12.			12.
c	490.		490.	0.
d				
e				

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				10,690.
b				12.
c				0.
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 10,702.

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			
2011			
2010			
2009			
2008			

2 Total of line 1, column (d)	2	
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	
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	
8 Enter qualifying distributions from Part XII, line 4	8	

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)

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ________ (attach copy of letter if necessary-see instructions) **b** Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ 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)			1	201.
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	201.
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	201.
6 Credits/Payments				
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	188.		
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	188.
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	13.
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?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		X
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			
c Did the foundation file **Form 1120-POL** for this year?	1c		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?	2		X
If "Yes," attach a detailed description of the activities			
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on Form **990-T** for this year? N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
If "Yes," attach the statement required by General Instruction T.			
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7 Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NY,DE			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Form **990-PF** (2013)

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Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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 ▶ N/A

14 The books are in care of ▶ IRA ALPERT Telephone no ▶212-372-1000

Located at ▶630 BIRDSALL DRIVE, YORKTOWN, NY ZIP+4 ▶10598

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

			Yes	No
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		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶			

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?	☐ 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			
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)?	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	▶☐			
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?	☐ Yes ☒ 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?	☐ 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)*	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

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
IRA ALPERT 630 BIRDSALL DRIVE YORKTOWN, NY 10598	AS NEEDED	0.	0.	0.
MARYLOU ALPERT 630 BIRDSALL DRIVE YORKTOWN, NY 10598	AS NEEDED	0.	0.	0.

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

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

Total number of other employees paid over $50,000 ▶ 0

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

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

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

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 NOT APPLICABLE	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NOT APPLICABLE	0.
2	
All other program-related investments See instructions 3	
Total. Add lines 1 through 3 ▶	0.

Form **990-PF** (2013)

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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	108,756.
b	Average of monthly cash balances	1b	33,500.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	142,256.
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	142,256.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	2,134.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	140,122.
6	**Minimum investment return.** Enter 5% of line 5	6	7,006.

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	7,006.
2a	Tax on investment income for 2013 from Part VI, line 5 2a 201.		
b	Income tax for 2013 (This does not include the tax from Part VI) 2b		
c	Add lines 2a and 2b	2c	201.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	6,805.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	6,805.
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	6,805.

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	8,317.
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	8,317.
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	8,317.

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					6,805.
2 Undistributed income, if any, as of the end of 2013					
a Enter amount for 2012 only				0.	
b Total for prior years ______ , ______ , ______			0.		
3 Excess distributions carryover, if any, to 2013					
a From 2008					
b From 2009					
c From 2010					
d From 2011	393.				
e From 2012	1,718.				
f Total of lines 3a through e		2,111.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ $	8,317.				
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					6,805.
e Remaining amount distributed out of corpus		1,512.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)		0.			0.
6 Enter the net total of each column as indicated below:					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		3,623.			
b Prior years' undistributed income Subtract line 4b from line 2b			0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed			0.		
d Subtract line 6c from line 6b Taxable amount - see instructions			0.		
e Undistributed income for 2012 Subtract line 4a from line 2a. Taxable amount - see instr				0.	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014					0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)		0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7		0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a		3,623.			
10 Analysis of line 9:					
a Excess from 2009					
b Excess from 2010					
c Excess from 2011	393.				
d Excess from 2012	1,718.				
e Excess from 2013	1,512.				

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			
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
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))

IRA ALPERT

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

NONE

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

b The form in which applications should be submitted and information and materials they should include

c Any submission deadlines

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

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*				
COLUMBUS COLLEGE OF ART & DESIGN 60 CLEVELAND AVENUE COLUMBUS, OH 43215	NONE	PC	UNRESTRICTED GRANT FOR DONEE'S EXEMPT PURPOSE	750.
BRIDGE FUND OF NY 271 MADISON AVENUE NEW YORK, NY 10016	NONE	PC	UNRESTRICTED GRANT FOR DONEE'S EXEMPT PURPOSE	3,000.
SIMON WIESENTHAL CENTER 1399 ROXBURY DRIVE LOS ANGELES, CA 90035	NONE	PC	UNRESTRICTED GRANT FOR DONEE'S EXEMPT PURPOSE	1,000.
SOUTHERN POVERTY LAW 400 WASHINGTON AVENUE MONTGOMERY, AL 36104	NONE	PC	UNRESTRICTED GRANT FOR DONEE'S EXEMPT PURPOSE	500.
YIVO INSTITUTE 15 WEST 16TH STREET NEW YORK, NY 10011	NONE	PC	UNRESTRICTED GRANT FOR DONEE'S EXEMPT PURPOSE	500.
Total			▶ 3a	5,750.
b *Approved for future payment* NONE				
Total			▶ 3b	0.

Form **990-PF** (2013)

323611
10-10-13

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
	(a) Business code	(b) Amount	(c) Exclusion 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					
4 Dividends and interest from securities			14	213.	
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	10,702.	
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.		10,915.	0.

13 **Total.** Add line 12, columns (b), (d), and (e) 13 10,915.

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes)

323621
10-10-13

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

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

d If the answer to any of the above is "Yes," complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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

b If "Yes," complete the following schedule

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

Sign Here

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

▶ Signature of officer or trustee | Date 3/9/15 | ▶ Title President

May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
MARTIN GREIF		3/2/15		P00029738

Firm's name ▶ MCGLADREY LLP | Firm's EIN ▶ 42-0714325

Firm's address ▶ 1185 AVENUE OF THE AMERICAS
NEW YORK, NY 10036-2602 | Phone no 212-372-1000

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
GGH A/C# 01529	213.	0.	213.	213.	
TO PART I, LINE 4	213.	0.	213.	213.	

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	3,390.	848.		2,542.
TO FORM 990-PF, PG 1, LN 16B	3,390.	848.		2,542.

FORM 990-PF OTHER EXPENSES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BROKER FEE	1.	1.		0.
DE FILING FEE	25.	0.		25.
TO FORM 990-PF, PG 1, LN 23	26.	1.		25.

FORM 990-PF CORPORATE STOCK STATEMENT 4

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
2,000 SHS HYDRON TECHNOLOGIES	45,450.	16.
GGHC - SEE SCHEDULE 1	62,653.	106,711.
TOTAL TO FORM 990-PF, PART II, LINE 10B	108,103.	106,727.

Account Open 01529 - IRA ALPERT AND MARYLOU ALPERT FOUNDATION
Position 11/28/2014

Manager	Travis Anderson	Rep	934		
Equity Amount	$107,988 73	Realized Short Term G/L	$198 04	TOTAL GAIN	$10,690 01 **Ties to G/L Report
Target Ratio	10	Realized Long Term G/L	$10,491 97		
Target	$10,799	Unrealized Short Position P/L	$0 00		
Risk Ratio :	0 988	Unrealized Long Position P/L	$44,059 07		
Leverage	0 988				
L/S Ratio	0	Master Account			

Long	Symbol	Trade Date	Quantity	Avg Price	Last Price	Value	P/L	Security Descirption
Long	AAC	10/07/2014	52	$19 56	$28 86	$1,500 72	$483 51	AAC Holdings Inc
	AAC	10/02/2014	66	$15 00	$28 86	$1,904 76	$914 76	AAC Holdings Inc
	AAOI	05/09/2014	112	$17 33	$10 85	$1,215 20	($725 37)	Applied Optoelectonics Inc
	AXAS	06/19/2014	215	$5 00	$3 33	$714 88	($360 12)	Abraxas Petreoleum Corp
	AXAS	06/19/2014	8	$5 35	$3 33	$26 60	($16 16)	Abraxas Petreoleum Corp
	BOOT	10/30/2014	24	$16 00	$21 60	$518 40	$134 40	Boot Barn Holdings Inc
	BOOT	10/30/2014	32	$18 36	$21 60	$691 20	$103 62	Boot Barn Holdings Inc
	BXE CT	01/09/2014	518	$7 81	$4 08	$2,113 22	($1,933 87)	Bellatrix Exploration Ltd
	CAR	01/04/2013	73	$22 02	$60 15	$4,390 95	$2,783 63	Avis Budget Group Inc
	CAR	01/08/2013	28	$22 17	$60 15	$1,684 20	$1,063 52	Avis Budget Group Inc
	CSGP	03/28/2013	34	$111 34	$170 26	$5,788 84	$2,003 36	Costar Group Inc
	DAKP	12/12/2012	520	$3 38	$1 45	$752 34	($1,008 71)	Dakota Plains Holdings Inc
	DOOR	10/03/2012	45	$35 98	$58 61	$2,637 45	$1,019 47	Masonite Int'l Corp
	DRT CT	08/12/2014	936	$3 42	$3 11	$2,908 93	($291 91)	DIRTT Environmental Solutions Ltd
	DRT CT	09/02/2014	210	$3 43	$3 11	$652 65	($68 50)	DIRTT Environmental Solutions Ltd
	DRT CT	10/15/2014	288	$2 99	$3 11	$895 06	$33 50	DIRTT Environmental Solutions Ltd
	ENPH	08/14/2014	66	$10 50	$10 51	$693 66	$0 66	Enphase Energy Inc
	ENPH	11/05/2014	98	$13 44	$10 51	$1,029 98	($286 95)	Enphase Energy Inc
	EXP	03/26/2013	30	$68 34	$82 39	$2,471 70	$421 58	Eagle Materials Inc
	FMI	07/18/2014	52	$27 33	$23 62	$1,228 24	($192 72)	Foundation Medicine Inc
	FRGI	08/24/2012	100	$16 19	$56 06	$5,606 00	$3,986 93	Fiesta Restaurant Group Inc
	FRPT	11/07/2014	25	$15 00	$16 71	$417 75	$42 75	FreshPet Inc
	GIMO	03/03/2014	63	$33 25	$14 34	$903 42	($1,191 20)	Gigamon Inc
	KSU	04/25/2012	51	$78 59	$118 94	$6,065 94	$2,057 63	Kansas City Southern
	LGIH	03/26/2014	248	$17 34	$15 98	$3,963 04	($336 10)	LGI Homes Inc
	LGIH	11/07/2013	26	$11 00	$15 98	$415 48	$129 48	LGI Homes Inc
	MBUU	01/31/2014	50	$17 69	$18 72	$936 00	$51 47	Malibu Boats Inc
	MBUU	02/05/2014	114	$17 80	$18 72	$2,134 08	$104 41	Malibu Boats Inc
	MBUU	01/31/2014	35	$14 00	$18 72	$655 20	$165 20	Malibu Boats Inc
	MEG CT	10/24/2013	73	$34 45	$16 26	$1,186 76	($1,328 35)	Meg Energy Corp
	NFLX	01/26/2012	25	$120 76	$346 59	$8,664 75	$5,645 73	Netflix Com Inc
	PAYC	04/28/2014	168	$15 43	$28 75	$4,830 00	$2,238 19	Paycom Software Inc
	PCRX	07/02/2012	116	$16 41	$93 93	$10,895 88	$8,992 64	Pacira Pharmaceuticals Inc
	PCRX	12/04/2012	74	$17 36	$93 93	$6,950 82	$5,666 33	Pacira Pharmaceuticals Inc
	SAVE	01/20/2012	172	$15 61	$82 69	$14,222 68	$11,537 54	Spirit Airlines Inc
	TAST	04/25/2014	204	$6 20	$7 51	$1,532 04	$267 24	Carrols Restaurant Group Inc
	URI	04/05/2013	31	$50 42	$113 31	$3,512 61	$1,949 48	United Rentals Inc
Long						$106,711 43	$44,059 07	

$62,652 36 Total Cost

SCHEDULE 1

Realized Gain/Loss Report

From 12/01/2013 To 11/30/2014 - Without Outside Holdings, Including Zero Gain/Loss, Including Non Reportable Transactions and Excluding Foreign Currency Contract(s)

GILDER , GAGNON, HOWE & CO., L.L.C.

FA: TRAVIS K ANDERSON/0934
For All Security Types, Sorted by Security, Convert to USD Value

Account: IRA ALPERT AND MARYLOU ALPERT/191-01529 1/5

Quantity	Description	Maturity Date	Acq Date	Unit Cost	Cost	Liq Date	Liq Unit Price	Proceeds	Short Term Gain/Loss	Long Term Gain/Loss
	LONG TRANSACTIONS									
	Common Stock									
500	***AUGUSTA RESOURCE Security 050912203000		05/11/2011	4 3344	2,167 20	07/03/2014	3 2206	1,610 33		(556 87)
83	AMERICAN INTERNATIONAL GROUP Security AIG		09/11/2012	33 2446	2,759 31	04/25/2014	51 2663	4,255 11		1,495 80
10	***ALIBABA GROUP HOLDING LTD Security BABA		09/18/2014	68 0000	680 00	11/04/2014	102 5830	1,025 83	345 83	
18	***COPA HOLDINGS S A Security CPA		08/23/2012	80 6183	1,451 13	11/04/2014	112 8933	2,032 08		580 95
16	***CYBERARK SOFTWARE LTD Security CYBR		09/24/2014	16 0000	256 00	09/25/2014	32 7731	524 37	268 37	
31	EBAY INC Security EBAY		07/19/2012	44 9109	1,392 24	01/09/2014	50 8658	1,576 84		184 60
5	EBAY INC Security EBAY		07/19/2012	44 9120	224 56	01/10/2014	50 6740	253 37		28 81
80	EBAY INC Security EBAY		07/19/2012	44 9111	3,592 89	06/17/2014	48 0460	3,843 68		250 79
	Subtotals of Security: EBAY				**5,209 69**			**5,673.89**	**0.00**	**464.20**
5	FIREEYE INC Security FEYE		03/06/2014	82 0000	410 00	04/25/2014	42 3160	211 58	(198 42)	
70	***FLEETMATICS GROUP PLC Security FLTX		07/31/2013	38 4720	2,693 04	02/21/2014	33 4101	2,338 71	(354 33)	
30	FIESTA RESTAURANT GROUP INC Security FRGI		08/24/2012	16 1906	485 72	11/04/2014	54 8393	1,645 18		1,159 46
125	***MONTAGE TECHNOLOGY GROUP Security G6209T105000		10/28/2013	14 3111	1,788 89	08/07/2014	21 0644	2,633 06	844 17	
4	***MONTAGE TECHNOLOGY GROUP Security G6209T105000		01/31/2014	21 0000	84 00	08/07/2014	21 0650	84.26	0 26	
53	***MONTAGE TECHNOLOGY GROUP Security G6209T105000		02/06/2014	17 2290	913 14	08/07/2014	21 0645	1,116 42	203 28	
	Subtotals of Security: G6209T105000				**2,786.03**			**3,833 74**	**1,047.71**	**0.00**

Please see important disclosures on Last Page.

SCHEDULE 2

Realized Gain/Loss Report

From 12/01/2013 To 11/30/2014 - Without Outside Holdings, Including Zero Gain/Loss, Including Non Reportable Transactions and Excluding Foreign Currency Contract(s)

Account: IRA ALPERT AND MARYLOU ALPERT/191-01629 1/5

Quantity	Description	Maturity Date	Acq Date	Unit Cost	Cost	Liq Date	Liq Unit Price	Proceeds	Short Term Gain/Loss	Long Term Gain/Loss
LONG TRANSACTIONS										
Common Stock										
685	***GOLD STANDARD VENTURES CORP Security GSV		06/02/2011	1 3836	947 80	11/04/2014	0 4903	335 88		(611 92)
13	HEALTHEQUITY INC Security HQY		07/31/2014	14 0000	182 00	09/19/2014	19 6000	254 80	72 80	
6	NETFLIX COM INC Security NFLX		01/26/2012	120 7616	724 57	11/04/2014	374 7033	2,248 22		1,523 65
1	NIMBLE STORAGE INC Security NMBL		12/13/2013	21 0000	21 00	09/19/2014	26 8600	26 86	5 86	
87	OCI PARTNERS LP Security OCIP		10/04/2013	17 5950	1,530 77	01/09/2014	26 2198	2,281 13	750 36	
21	PACIRA PHARMACEUTICALS INC Security PCRX		07/02/2012	16 4071	344 55	09/19/2014	101 5228	2,131 98		1,787 43
67	***QIWI PLC Security QIWI		06/17/2014	41 3419	2,769 91	10/14/2014	27 6535	1,852 79	(917 12)	
42	REALOGY HOLDINGS CORP Security RLGY		10/12/2012	34 9557	1,468 14	05/06/2014	36 4747	1,531 94		63 80
32	SPIRIT AIRLINES INC Security SAVE		01/20/2012	15 6112	499 56	01/21/2014	49 0840	1,570 69		1,071 13
30	SPIRIT AIRLINES INC Security SAVE		01/20/2012	15 6113	468 34	03/26/2014	59 7863	1,793 59		1,325 25
			Subtotals of Security: SAVE		**967.90**			**3,364.28**	**0.00**	**2,396.38**
215	SUPERIOR DRILLING PRODUCTS INC Security SDPI		05/23/2014	4 0000	860 00	11/04/2014	5 2096	1,120 08	260 08	
5	CONTAINER STORE GROUP INC Security TCS		11/01/2013	18 0000	90 00	04/28/2014	27 0180	135 09	45 09	
4	CONTAINER STORE GROUP INC Security TCS		11/01/2013	18 0000	72 00	07/09/2014	22 8775	91 51	19 51	
			Subtotals of Security· TCS		**162.00**			**226.60**	**64.60**	**0.00**
45	TREX COMPANY INC Security TREX		06/18/2013	56 7068	2,551 81	03/26/2014	67 5344	3,039 05	487 24	
90	***VALIDUS HOLDINGS LTD Security VR		07/13/2009	21 6123	1,945 11	01/31/2014	34 2542	3,082 88		1,137 77
60	BERKLEY W R CORPORATION Security WRB		03/03/2009	20 3106	1,218 64	02/04/2014	37 8326	2,269 96		1,051 32
587	ZOGENIX INC Security ZGNX		02/05/2014	4 1563	2,439 79	08/29/2014	1 3059	766 62	(1,673 17)	

Please see important disclosures on Last Page

SCHEDULE 2

Realized Gain/Loss Report

From 12/01/2013 To 11/30/2014 - Without Outside Holdings, Including Zero Gain/Loss, Including Non Reportable Transactions and Excluding Foreign Currency Contract(s)

Account: IRA ALPERT AND MARYLOU ALPERT/191-01529 1/5

Quantity Description	Maturity Date	Acq Date	Unit Cost	Cost	Liq Date	Liq Unit Price	Proceeds	Short Term Gain/Loss	Long Term Gain/Loss
LONG TRANSACTIONS									
Common Stock									
3 ZOES KITCHEN INC Security ZOES		04/11/2014	15 0000	45 00	09/19/2014	27 7433	83 23	38 23	
Subtotals of Common Stock				37,077 11			47,767.12	198.04	10,491.97
Subtotals of LONG TRANSACTIONS				37,077.11			47,767.12	198.04	10,491.97
Grand Total				37,077.11			47,767.12	198.04	10,491.97

Please see important disclosures on Last Page

SCHEDULE 2