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Form

990-PF

Return of Private Foundation

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

OMB No 1545-0052

2014

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

► 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.

For calendar year 2014 or tax year beginning

, 2014, and ending

, 20

Name of foundation

HONKUS-ZOLLINGER CHARITABLE FOUNDATION

A Employer identification number

20-6056639

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

Room/suite

B Telephone number (see instructions)

412-209-2511

C/O DAVID R. BERK, ESQ., ONE PPG PLACE

3010

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

PITTSBURGH, PA 15222

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

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

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ 2,168,825.90
 J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____
 (Part I, column (d) must be on cash basis)

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

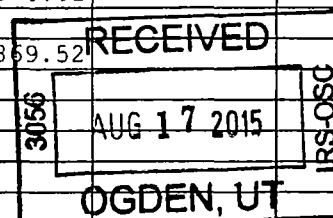
(c) Adjusted net income

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

1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check ☐ if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments	294	294		
4	Dividends and interest from securities	24,964.32	24,964.32		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	43,074.19			
b	Gross sales price for all assets on line 6a				
7	Capital gain net income (from Part IV, line 2)		43,074.19		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)	0.00			
11	Other income (attach schedule)	25,723.66	25,723.66		
12	Total. Add lines 1 through 11	94,056.17	94,056.17	0.00	
13	Compensation of officers, directors, trustees, etc.				
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)	9,472.34	9,472.34		
b	Accounting fees (attach schedule)				
c	Other professional fees (attach schedule)	5,070.01	5,070.01		
17	Interest				
18	Taxes (attach schedule) (see instructions)	2,869.52	2,869.52		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule)	15			
24	Total operating and administrative expenses. Add lines 13 through 23	17,426.87	17,411.87	0.00	0.00
25	Contributions, gifts, grants paid	101,000			101,000
26	Total expenses and disbursements. Add lines 24 and 25	118,426.87	17,411.87	0.00	101,000.00
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	(24,370.70)			
b	Net investment income (if negative, enter -0-)		76,644.30		
c	Adjusted net income (if negative, enter -0-)			0.00	

For Paperwork Reduction Act Notice, see Instructions.

Form 990-PF (2014)

SCANNED AUG 19 2015
Revenue
Operating and Administrative Expenses

61415

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	3,625.58	91,155.39	91,155.39
	2 Savings and temporary cash investments	511,584.76	46,843.54	46,843.54
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	25,245.89	8,079.37	35,906.84
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶			
Liabilities	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 ▶ <u>MUTUAL FUNDS</u>)	1,678,502.71	1,747,165.62	1,994,920.13
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,224,958.94	1,893,243.92	2,168,825.90
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
Net Assets or Fund Balances	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.00	0.00	
	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	2,224,958.94	1,893,243.92	
Net Assets or Fund Balances	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	2,224,958.94	1,893,243.92	
	31 Total liabilities and net assets/fund balances (see instructions)	2,224,958.94	1,893,243.92	

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	2,224,958.94
2	Enter amount from Part I, line 27a	2	(24,370.70)
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	2,200,588.24
5	Decreases not included in line 2 (itemize) ▶ <u>ADJUSTMENT TO COST BASIS</u>	5	307,344.32
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,893,243.92

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE ATTACHED (SHORT TERM)				
b SEE ATTACHED (LONG TERM)				
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 15,755.01		15,888.43	(133.42)	
b 222,809.98		179,602.37	43,207.61	
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
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	43,074.19
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8			3	

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?
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.☐ Yes ☒ No

(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))
2013	97,185	2,158,302	0.0450
2012	86,500	1,670,107	0.0518
2011	63,474	1,602,100	0.0396
2010	50,015	1,294,286	0.0386
2009	36,600	1,184,966	0.0309
2 Total of line 1, column (d)			2 0.2059
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 .04118
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5			4 2,202,077.79
5 Multiply line 4 by line 3			5 90,681.56
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 766.44
7 Add lines 5 and 6			7 91,448.00
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.			8 101,000

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	1	766.44
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	
3	Add lines 1 and 2	3	766.44
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	766.44
6	Credits/Payments:		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	3,500.69
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	3,500.69
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	0.00
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	2,734.25
11	Enter the amount of line 10 to be Credited to 2015 estimated tax 2,734.25 Refunded	11	0.00

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
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the 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. ▶ \$ (2) On foundation managers. ▶ \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$		
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
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? <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, col (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ PENNSYLVANIA		
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 2014 or the taxable year beginning in 2014 (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

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 ▶	13	X	
14	The books are in care of ▶ DAVID R. BERK, ESQ. Telephone no ▶ 412-209-2511 Located at ▶ ONE PPG PLACE, STE 3010, PITTSBURGH, PA ZIP+4 ▶ 15222			
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			
16	At any time during calendar year 2014, 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 FinCEN Form 114, (formerly 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? ☐ 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)? Organizations relying on a current notice regarding disaster assistance check here ▶ ☐	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 2014?	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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ Yes ☒ No If "Yes," list the years ▶ 20 , 20 , 20 , 20		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	X
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20 , 20 , 20 , 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2014 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 2014.)	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 2014?	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 4945(d)(4)(A)? (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)? ☐ Yes ☒ No
- 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? ☐ 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? ☐ Yes ☒ No
- 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? ☐ Yes ☒ No

5b

6b

7b

X

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
DEBRA A. HONKUS 132 BAILEYS RD, BOLIVAR, PA 15923	CO-TRUSTEE .25	0	0	0
JASON HONKUS 766 FREEPORT RD, FREEPORT, PA 16229	CO-TRUSTEE .25	0	0	0
DAVID R. BERK, ESQ. ONE PPG PLACE #3010, PITTSBURGH, PA	CO-TRUSTEE 1.00	0	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 ☐

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

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.

1	N/A	
2		
3		
4		

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

1	N/A	
2		
3	All other program-related investments See instructions	
Total. Add lines 1 through 3		0.00

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	2,147,082.57
b	Average of monthly cash balances	1b	88,529.4
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	2,235,611.97
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	2,235,611.97
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	33,534.18
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,202,077.79
6	Minimum investment return. Enter 5% of line 5	6	110,103.89

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	110,103.89
2a	Tax on investment income for 2014 from Part VI, line 5 2a	766.44	
b	Income tax for 2014. (This does not include the tax from Part VI.) 2b		
c	Add lines 2a and 2b	2c	766.44
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	109,337.45
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	109,337.45
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	109,337.45

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	101,000
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	101,000.00
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	766.44
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	100,233.56

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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				109,337.45
2 Undistributed income, if any, as of the end of 2014:				
a Enter amount for 2013 only			77,809.80	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2014:				
a From 2009				
b From 2010				
c From 2011				
d From 2012				
e From 2013				
f Total of lines 3a through e	0.00			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 101,000				
a Applied to 2013, but not more than line 2a			77,809.80	
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2014 distributable amount				23,190.20
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.00			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.00		
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				
d Subtract line 6c from line 6b. Taxable amount—see instructions		0.00		
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount—see instructions			0.00	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				86,147.25
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	0.00			
10 Analysis of line 9:				
a Excess from 2010				
b Excess from 2011				
c Excess from 2012				
d Excess from 2013				
e Excess from 2014				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, 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) 2014	(b) 2013	(c) 2012	(d) 2011	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					0.00
b 85% of line 2a	0.00	0.00	0.00	0.00	0.00
c Qualifying distributions from Part XII, line 4 for each year listed					0.00
d Amounts included in line 2c not used directly for active conduct of exempt activities					0.00
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	0.00	0.00	0.00	0.00	0.00
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					0.00
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0.00
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					0.00
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)					0.00
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0.00
(3) Largest amount of support from an exempt organization					0.00
(4) Gross investment income					0.00

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).)

DEBRA A. HONKUS

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 <i>Paid during the year</i> SEE SCHEDULE ATTACHED				
Total			3a	0.00
b <i>Approved for future payment</i>				
Total			3b	0.00

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) Related or exempt function income (See instructions)
		(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			14	294	
4	Dividends and interest from securities			14	24,964.32	
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			18	25,723.66	
8	Gain or (loss) from sales of assets other than inventory			18	43,074.19	
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)		0.00		94,056.17	0.00
13	Total. Add line 12, columns (b), (d), and (e)				13	94,056.17

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

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

[illegible]

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.		

[illegible]

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

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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.					May the IRS discuss this return with the preparer shown below (see instructions)? ☒ Yes ☐ No
	Signature of officer or trustee 	Date <u>8/11/15</u>	Title <u>CO-TRUSTEE</u>			
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature	Date	Check ☐ if self-employed	PTIN
	DAVID R. BERK, ESQ.			<u>8/11/15</u>		P00633707
	Firm's name ▶ SAUL EWING LLP					Firm's EIN ▶ 23-1416352
	Firm's address ▶ ONE PPG PLACE, STE 3010, PITTSBURGH, PA 15222					Phone no. 412-209-2511

HONKUS-ZOLLINGER FOUNDATION
12/31/2014 PORTFOLIO VALUE

ASSETS	AMOUNT	TOTAL
Cash and Bank Accounts		
Dollar Savings #5974	\$ 91,155.39	
Dollar Savings #5974	\$ 46,843.54	
Vanguard Money Market	<u>\$ 421,641.62</u>	\$ 559,640.55
Investments		
Capital Guardian Account		
Capital Core Bond Fund (CCBPX)	\$ 474,323.53	
Capital Global Equity Fund (CGLOX)	\$ 767,597.81	
Capital Income Builder Inc. RS (CAIFX)	\$ 109,921.52	
New World Fund Inc. (NFFFX)	\$ 110,208.72	
Smallcap World Fund Inc. CI RS (SMCFX)	<u>\$ 111,226.93</u>	\$ 1,573,278.51
Vanguard Securities		
Apple (AAPL)	<u>\$ 35,906.84</u>	<u>\$ 35,906.84</u>
TOTAL		\$ 2,168,825.90

2014 Tax Information Statement

Page 7 of 14

CAPITAL GUARDIAN TRUST COMPANY
C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
IRVINE, CA 92618

Account Number: 70-705500
Recipient's Tax ID Number: XX-XXX6651

Recipient's Name and Address:
HONKUS-ZOLLINGER CHARIT. FOUNDATION
C/O DAVID BERK, TRUSTEE
SAUL EWING, LLP
ONE OXFORD CENTRE SUITE 4300
PITTSBURGH, PA 15219

☐ Corrected ☐ 2nd TIN notice

2014 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.
Cost or Other Basis amounts shown with a "U" are unknown or unsubstantiated.

Description of property

Cusip Number	Date Sold or Disposed	Date Acquired	Proceeds	Cost or Other Basis	Code if any	Adjustments	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
Short Term Sales									
CAPITAL GROUP CORE BOND FUND									
14042Y304	12/19/2014	Various	1,316.90	1,320.74		0.00	-3.84	0.00	0.00
CAPITAL GROUP CORE BOND FUND									
14042Y304	12/19/2014	Various	3,895.65	3,905.37		0.00	-9.72	0.00	0.00
CAPITAL GROUP GLOBAL EQUITY FUND									
14042Y700	01/30/2014	12/30/2013	1,243.35	1,278.24		0.00	-34.89	0.00	0.00
CAPITAL GROUP GLOBAL EQUITY FUND									
14042Y700	02/13/2014	12/30/2013	5,641.17	5,667.70		0.00	-26.53	0.00	0.00
NEW WORLD FUND CL F2									
649280823	12/19/2014	Various	3,657.94	3,716.38		0.00	-58.44	0.00	0.00
Total Short Term Sales			15,755.01	15,888.43		0.00	-133.42	0.00	0.00
Long Term Sales									
CAPITAL GROUP CORE BOND FUND									
14042Y304	12/19/2014	Various	10,581.57	10,569.88		0.00	11.69	0.00	0.00
CAPITAL GROUP CORE BOND FUND									
14042Y304	12/19/2014	Various	18,527.24	18,883.06		0.00	-355.82	0.00	0.00

This is important tax information and is being furnished to you.

2014 Tax Information Statement

Page 8 of 14

Account Number: 70-705500
 Recipient's Tax ID Number: XX-XXX6651
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
 HONKUS-ZOLLINGER CHARIT. FOUNDATION
 C/O DAVID BERK, TRUSTEE
 SAUL EWING, LLP
 ONE OXFORD CENTRE SUITE 4300
 PITTSBURGH, PA 15219

CAPITAL GUARDIAN TRUST COMPANY
 C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
 IRVINE, CA 92618

Sales are listed at Gross Proceeds less commissions and option premiums.
 Cost or Other Basis amounts shown with a "U" are unknown or unsubstantiated.

Description of property

Cusip Number	Date Sold or Disposed	Date Acquired	Proceeds	Cost or Other Basis	Code if any	Adjustments	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
CAPITAL GROUP GLOBAL EQUITY FUND									
14042Y700	02/13/2014	Various	55,658.83	42,654.27		0.00	13,004.56	0.00	0.00
CAPITAL GROUP GLOBAL EQUITY FUND									
14042Y700	05/01/2014	02/16/2012	1,255.77	951.87		0.00	303.90	0.00	0.00
CAPITAL GROUP GLOBAL EQUITY FUND									
14042Y700	07/31/2014	02/16/2012	1,282.31	954.11		0.00	328.20	0.00	0.00
CAPITAL GROUP GLOBAL EQUITY FUND									
14042Y700	10/30/2014	02/16/2012	1,288.58	951.49		0.00	337.09	0.00	0.00
CAPITAL GROUP GLOBAL EQUITY FUND									
14042Y700	12/19/2014	02/16/2012	84,317.66	61,697.40		0.00	22,620.26	0.00	0.00
CAPITAL INCOME BUILDER CL F2									
140194101	12/19/2014	Various	20,016.02	20,184.10		0.00	-168.08	0.00	0.00
SMALLCAP WORLD FUND CL F2									
831681820	02/13/2014	Various	19,936.57	15,164.56		0.00	4,772.01	0.00	0.00
SMALLCAP WORLD FUND CL F2									
831681820	02/13/2014	12/26/2012	2,263.43	1,784.28		0.00	479.15	0.00	0.00
SMALLCAP WORLD FUND CL F2									
831681820	12/19/2014	05/23/2008	7,682.00	5,807.35		0.00	1,874.65	0.00	0.00
Total Long Term Sales									
			222,809.98	179,602.37		0.00	43,207.61	0.00	0.00

This is important tax information and is being furnished to you.

HONKUS-ZOLLINGER CHARITABLE FOUNDATION

20-6056693

2014 FORM 990-PF

Rider to Part I, Line 25 & Part VI, Line 3a

Description	Relationship	Status	Purpose	Amount
12/11/2014 Action for Animals 386 Route 217 Latrobe, PA 15650 ATTN: Lou Ann Hutchinson	None	Public	General	\$ 2,000.00
12/11/2014 Allegheny Valley Hospital 1301 Carlisle Street Natrona Heights, PA 15065	None	Public	General	\$ 2,000.00
12/11/2014 American Heart Association Four Gateway Center 444 Liberty Avenue Suite 1300 Pittsburgh, PA 15222	None	Public	General	\$ 1,500.00
12/11/2014 Benedictine Sisters of Ridgely, Maryland St. Gertrude Monastery 14259 Benedictine Lane Ridgely, MD 21660	None	Public	General	\$ 1,000.00
12/11/2014 Best of the Batch Foundation 2000 West Street Munhall, PA 15120	None	Public	General	\$ 2,000.00
04/30/2014 The Brain Injury Association of Pennsylvania 950 Walnut Bottom Road, Suite 15-229 Carlisle, PA 17015	None	Public	General	\$ 1,500.00

04/25/2014	Burrell Education Foundation Burrell School District 1021 Puckety Church Road Lower Burrell, PA 15068	None	Public	General	\$	2,500.00
12/11/2014	Carnegie Library of Pittsburgh 4400 Forbes Avenue Pittsburgh, PA 15213-4080	None	Public	General	\$	2,000.00
12/11/2014	Childrens Hospital of Pittsburgh 1251 Waterfront Place, 5th Floor Pittsburgh, Pa 15222	None	Public	General	\$	2,000.00
12/11/2014	Childrens Museum of Pittsburgh 10 Children's Way Pittsburgh, PA 15212	None	Public	General	\$	2,000.00
09/05/2014	City of Hope 105 Wilshire Boulevard Los Angeles, CA 90017	None	Public	General	\$	5,000.00
04/25/2014	Coalition for Pulmonary Fibrosis 10866 W. Washington Blvd. #343 Culver City, CA 90232	None	Public	General	\$	2,500.00
12/11/2014	Jennifer Sidari, MD Scholarship Fund at The Commonwealth Medical College Student Affairs Office 525 Pine Street Scranton, PA 18509	None	Public	General	\$	2,000.00
12/11/2014	Disabled American Veterans 1142 Erie Avenue Vandergrift, PA 15690	None	Public	General	\$	2,000.00

04/18/2014	Drive for Autism Autism Society of Delaware 924 Old Harmony Road Newark, DE 19713	None	Public	General	\$	5,000.00
12/11/2014	Fairfield Township Volunteer Fire Co. P.O. Box 307 New Florence, PA 15944-0307	None	Public	General	\$	1,500.00
12/11/2014	Family House 5301 Fifth Avenue Pittsburgh, PA 15232	None	Public	General	\$	2,000.00
12/11/2014	Free Wheelchair Mission 9341 Irvine Boulevard Irvine, CA 92618	None	Public	General	\$	2,000.00
12/11/2014	The Friendship Circle of Pittsburgh 5872 Northumberland Street Pittsburgh, PA 15217	None	Public	General	\$	1,500.00
12/11/2014	The Frick Art & Historical Center 7227 Reynolds Street Pittsburgh, PA 15208	None	Public	General	\$	2,000.00
12/11/2014	Heinz Hall Donor Relations Department 600 Penn Avenue Pittsburgh, PA 15222	None	Public	General	\$	1,000.00
12/11/2014	The Independence Fund, Inc. 32379 Collection Center Drive Chicago, IL 60693-0323	None	Public	General	\$	2,500.00

03/31/2014	Jameson's Army c/o Danielle McKain P.O. Box 46 Cecil, PA 15321	None	Public	General	\$	1,000.00
03/06/2014	The Leukemia & Lymphoma Society Western PA & WV Chapter 333 E. Carson Street, Suite 441 Pittsburgh, PA 15219	None	Public	General	\$	1,000.00
12/11/2014	Library Society 880 Barnes Street New Kensington, PA 15068	None	Public	General	\$	1,000.00
12/11/2014	Ligonier Valley Historical Society P.O. Box 167 Laughlintown, PA 15655	None	Public	General	\$	2,000.00
12/11/2014	Lincoln Highway Heritage Center 3435 US 30 Latrobe, PA 15650	None	Public	General	\$	2,500.00
12/11/2014	Los Angeles Education Partnership two Bit Circus- STEAM Gala 678 South Avenue 21 Los Angeles, CA 90031	None	Public	General	\$	5,000.00
12/01/2013	Make-A-Wish Foundation of Greater Pittsburgh and Southern West Virginia 707 Grant Street, 37 th Floor Pittsburgh, PA 15219	None	Public	General	\$	7,800.00
04/02/2014	Multiple Sclerosis Society of Western PA 1501 Reedsdale St. Ste 105 Pittsburgh, PA 15233	None	Public	General	\$	1,000.00

12/11/2014	National Aviary Allegheny Commons West Pittsburgh, PA 15212	None	Public	General	\$	1,000.00
12/11/2014	National Multiple Sclerosis Society 1501 Reddsdale St. Ste 105 Pittsburgh, PA 15233	None	Public	General	\$	1,000.00
12/09/2014	The NASCAR Foundation Nascar Plaza 550 South Caldwell Street, Suite 2000 Charlotte, NC 28202	None	Public	General	\$	1,000.00
12/11/2014	Peoples Library Lower Burrell 3052 Wachter Avenue Lower Burrell, PA 15068	None	Public	General	\$	1,000.00
12/11/2014	Phipps Conservatory One Schenley Park (Frank Curto Drive) Pittsburgh, PA 15206	None	Public	General	\$	2,000.00
12/11/2014	Pittsburgh Cultural Trust 803 Liberty Avenue Pittsburgh, PA 15222	None	Public	General	\$	2,000.00
12/11/2014	Pittsburgh Zoo and PPG Aquarium Pone Wild Place Pittsburgh, PA 15206	None	Public	General	\$	1,500.00
09/25/2014	Quaker Valley Westling Association P.O. Box 23562 Pittsburgh, PA 15222	None	Public	General	\$	2,500.00

12/11/2014	Ronald McDonald House 451 44th St Pittsburgh, PA 15201	None	Public	General	\$	1,500.00
3/6/2014	The Rotary District 7300 Foundation New Kensington Area Rotary Attn: Rotarama Committee P.O. Box 164 New Kensington, PA 15068	None	Public	General	\$	1,000.00
12/11/2014	The Salvation Army 424 Third Avenue Pittsburgh, PA 15219	None	Public	General	\$	2,500.00
12/11/2014	Southern Alleghenies Museum of Art c/o St. Francis University One Boucher Lane and Route 711 South Ligonier, PA 15658	None	Public	General	\$	1,000.00
7/7/2014	St. Jude Children's Research Hospital Ally Strong 262 Danny Thomas Place Memphis, TN 38105	None	Public	General	\$	2,500.00
12/11/2014	SVG Sports Broadcasting Fund c/o Alma Foundation 21135 Falls Ridge Way Boca Raton, FL 33428	None	Public	General	\$	5,000.00
12/11/2014	Three Rivers Arts Festival 803 Liberty Avenue Pittsburgh, PA 15222	None	Public	General	\$	200.00
12/11/2014	Valley Players of Ligonier PO Box 127	None	Public	General	\$	3,500.00

Ligonier, PA 15658

12/11/2014	Western Pennsylvania Conservancy Laurel Highlands Regional Office P.O. Box 12 Ligonier, PA 15658	None	Public	General	\$	2,000.00
12/11/2014	Westmoreland Museum of Art 221 North Main Street Greensburg, PA 15601	None	Public	General	\$	1,000.00
			TOTAL	\$		101,000.00

(Rev. 5/03)

(717) 783-1720
1-800-732-0999 (WITHIN PA)
FAX (717) 783-6014

COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF STATE
BUREAU OF CHARITABLE ORGANIZATIONS
207 NORTH OFFICE BUILDING
HARRISBURG, PA 17120

Institution of Purely Public Charity Registration Statement
For the Fiscal Year Which Ended: 12/31/14

☒ Exempt from registration. (Give reason for exemption, complete items #1 - #3, and sign below.)

IT RECEIVED NO CONTRIBUTIONS IN ITS MOST RECENT YEAR AND HAS INCOME
OF LESS THAN \$5,000,000.

1. Employer Identification # 20-6056639 Registration # (If known) _____
2. Legal name of organization: HONKUS-ZOLLINGER CHARITABLE FOUNDATION
3. c/o DAVID R. BERK, ESQ., CO-TRUSTEE
Street address ONE PPG PLACE SUITE 3010
City PITTSBURGH State PA Zip Code 15222
County ALLEGHENY
Telephone # 412-209-2511 800 Telephone # _____
4. Date organized: 10/29/03
5. Has your organization's tax-exempt status ever been revoked by the Internal Revenue Service? Yes ☐ No ☐ (If "yes", attach copy of revocation.)
6. Does your organization share revenue or formal governance with any other nonprofit corporation or unincorporated association? Yes ☐ No ☐ (If "yes", attach explanation listing name, address, type of organization, and relationship to your organization.)
7. Does any other domestic or foreign organization own a 10% or greater interest in your organization or does your organization own a 10% or greater interest in any other domestic or foreign organization? Yes ☐ No ☐ (If "yes", attach the following information for each domestic or foreign organization: name and type of organization, whether organization is for-profit or nonprofit, and relationship of organization to your organization.)
8. Attach a complete copy of your organization's IRS 990 Return and Schedule A for the fiscal year covered by this registration statement. (Make sure you include copies of all pages and attachments.)
9. Please include \$15 filing fee. (Make check or money order made payable to the "Commonwealth of Pennsylvania".)

Complete the following if an extension is needed to file the IRS 990 Return

10. An extension of time until 8/15/15 is requested for filing our IRS 990 Return.

I do hereby declare that the information contained herein is true and correct to the best of my knowledge, information, and belief.



SIGNATURE OF AUTHORIZED OFFICIAL

DAVID R. BERK, ESQ. CO-TRUSTEE

TYPE OR PRINT NAME AND TITLE OF
AUTHORIZED OFFICIAL OF THE ORGANIZATION

5/14/15
DATE