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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052





2014


Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014, and ending 12-31-2014

Name of foundation The Uberoi Foundation for Religious Studies		A Employer identification number 26-6101307	
% Foundation Source		B Telephone number (see instructions) (800) 839-1754	
Number and street (or P O box number if mail is not delivered to street address) Foundation Source 501 Silverside Rd		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code Wilmington, DE 198091377		C If exemption application is pending, check here	
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> 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)\$ 7,857,382		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	0			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	25	25		
	4 Dividends and interest from securities.	142,882	142,882		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	403,676			
	b Gross sales price for all assets on line 6a				
	2,279,504				
	7 Capital gain net income (from Part IV, line 2)		406,679		
	8 Net short-term capital gain				
	9 Income modifications				
Operating and Administrative Expenses	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	86,161	87,345		
	12 Total. Add lines 1 through 11	632,744	636,931		
	13 Compensation of officers, directors, trustees, etc	51,000			51,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	114,210	66,512		47,698
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	12,734	4,596		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	41,174			41,174
	22 Printing and publications	101			101
	23 Other expenses (attach schedule)	71,653	36,624		34,453
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	290,872	107,732		174,426
	25 Contributions, gifts, grants paid	212,478			212,478
	26 Total expenses and disbursements. Add lines 24 and 25	503,350	107,732		386,904
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	129,394			
	b Net investment income (if negative, enter -0-)		529,199		
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	135,826	210,341	210,341
	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)	544,058 	505,762	501,460
	b	Investments—corporate stock (attach schedule)	3,544,028 	3,825,133	4,612,651
	c	Investments—corporate bonds (attach schedule).	727,654 	795,820	804,681
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,595,372 	1,351,759	1,728,249
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	6,546,938	6,688,815	7,857,382	
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 (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	6,546,938	6,688,815	
	30	Total net assets or fund balances (see instructions)	6,546,938	6,688,815	
	31	Total liabilities and net assets/fund balances (see instructions) . . .	6,546,938	6,688,815	

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 6,546,938
2	Enter amount from Part I, line 27a	2 129,394
3	Other increases not included in line 2 (itemize) ▶ 	3 12,483
4	Add lines 1, 2, and 3	4 6,688,815
5	Decreases not included in line 2 (itemize) ▶ _____	5
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6 6,688,815

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)
1 a	Publicly-traded Securities			
b	Passthrough K1 Capital Gain			
c	FWCM HIGH YIELD CAPITAL APPRECIATION LP	P	2008-12-26	2014-08-01
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 1,940,754		1,660,890	279,864
b			125,041
c 338,750		336,976	1,774
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			279,864
b			
c			1,774
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	406,679
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? ☐ 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 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))
2013	327,086	7,509,207	0 043558
2012	344,862	6,922,161	0 04982
2011	333,986	6,984,969	0 047815
2010	304,596	6,947,159	0 043845
2009	169,203	6,281,715	0 026936

2	Total of line 1, column (d).	2	0 211974
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 042395
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	7,828,739
5	Multiply line 4 by line 3.	5	331,899
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	5,292
7	Add lines 5 and 6.	7	337,191
8	Enter qualifying distributions from Part XII, line 4.	8	386,904

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 VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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)

1

Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b

2

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-)

3

Add lines 1 and 2.

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)

5

Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-

6

Credits/Payments

6a

2014 estimated tax payments and 2013 overpayment credited to 2014

7,288

6b

Exempt foreign organizations—tax withheld at source

6c

Tax paid with application for extension of time to file (Form 8868)

2,980

6d

Backup withholding erroneously withheld

7

Total credits and payments Add lines 6a through 6d.

10,268

8

Enter any penalty for underpayment of estimated tax Check here ☒ if Form 2220 is attached

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.

4,976

11

Enter the amount of line 10 to be Credited to 2015 estimated tax 0 Refunded

4,976

Part VII-AStatements Regarding Activities

1a

During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1a

No

1b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?

1b

No

1c

Did the foundation file Form 1120-POL for this year?

1c

No

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?

2

No

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

No

4a

Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a

Yes

4b

If "Yes," has it filed a tax return on Form 990-T for this year?

4b

Yes

5

Was there a liquidation, termination, dissolution, or substantial contraction during the year?

5

No

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either

6

Yes

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

Yes

8a

Enter the states to which the foundation reports or with which it is registered (see instructions)

8a

CO

8b

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

Yes

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)?

9

No

10

Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.

10

No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address				
14	The books are in care of Foundation Source Telephone no (800) 839-1754 Located at 501 Silverside Road Suite 123 Wilmington DE ZIP+4 198091377			
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?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).			
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		No
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		No
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? 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		
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?			
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		No
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		No

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))?

YesNo

(2)

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

YesNo

(3)

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

YesNo

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

YesNo

(5)

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

YesNo

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)?

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?

YesNo

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?

YesNo

b

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

6b

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?

YesNo

b

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

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 (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

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

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

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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
First Western Trust Bank 1200 17th Street Ste 2650 DENVER, CO 80202	Inv Mgmt/Admin	98,132
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	Expenses
1	
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	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3.	

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	5,759,877
b	Average of monthly cash balances.	1b	262,150
c	Fair market value of all other assets (see instructions).	1c	1,925,931
d	Total (add lines 1a, b, and c).	1d	7,947,958
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	7,947,958
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	119,219
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	7,828,739
6	Minimum investment return. Enter 5% of line 5.	6	391,437

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	391,437
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	5,292
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	5,292
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	386,145
4	Recoveries of amounts treated as qualifying distributions.	4	12,483
5	Add lines 3 and 4.	5	398,628
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	398,628

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	386,904
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	386,904
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	5,292
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	381,612

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				398,628
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			361,018	
b Total for prior years 2012 , 2011 , 2010				
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.				
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 386,904				
a Applied to 2013, but not more than line 2a			361,018	
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.				25,886
e Remaining amount distributed out of corpus	0			
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			
b Prior years' undistributed income Subtract line 4b from line 2b.				
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				
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				372,742
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			
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. . . . 0				

Part XIVPrivate 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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2014	(b) 2013	(c) 2012	(d) 2011	
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 XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

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

NONE

b

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

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 email 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

Form 990-PF (2014)

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	212,478
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2014)

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?

Yes	No
-----	----

No

a Transfers from the reporting foundation to a noncharitable exempt organization of

(1) Cash.

1a(1)

No

(2) Other assets.

1a(2)

No

b Other transactions

(1) Sales of assets to a noncharitable exempt organization.

1b(1)

No

(2) Purchases of assets from a noncharitable exempt organization.

1b(2)

No

(3) Rental of facilities, equipment, or other assets.

1b(3)

No

(4) Reimbursement arrangements.

1b(4)

No

(5) Loans or loan guarantees.

1b(5)

No

(6) Performance of services or membership or fundraising solicitations.

1b(6)

No

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

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.

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

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.

Sign Here	*****	2015-11-10	*****	May the IRS discuss this return with the preparer shown below (see instr)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Signature of officer or trustee	Date	Title	

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.

* * * * *

2015-11-10

* * * * *

Signature of officer or trustee

Date

Title








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

☒ Yes ☐ No

**Paid
Preparer
Use
Only**

Form **990-PF** (2014)

Form 990PF Part VIII Line 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
Anu Bhatia  Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Trustee 3 0	10,000		
Jyothi Bhatia  Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Trustee 2 0	10,000		
Sneha Hajai  Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Trustee 2 0	10,000		
Katharine Nanda  Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Sec 5 0	1,000		
Ved P Nanda  Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Chairman 5 0	10,000		
James Polsfut  Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Executive Dir / Treas 1 0	40,000		
Parveen K Setia  Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Vice Chairman 1 0	10,000		

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CALIFORNIA STATE UNIVERSITY FOUNDATION 401 GOLDEN SHORE 6TH FL LONG BEACH,CA 90802	N/A	PC	Teach India	11,000
CLAREMONT LINCOLN UNIVERSITY 250 W 1ST ST CLAREMONT,CA 91711	N/A	PC	Center for Jain and Sikh Studies	15,000
HIMALAYAN ACADEMY 107 KAHOLALELE RD KAPAA,HI 96746	N/A	PC	California School Textbook Controversy Revisited	28,000
HIMALAYAN ACADEMY 107 KAHOLALELE RD KAPAA,HI 96746	N/A	PC	Hindu India 300 to 1850 CE	20,000
HINDU AMERICAN FOUNDATION 910 17TH ST NW STE 1180 WASHINGTON,DC 20006	N/A	PC	Comprehensive Education Reform	35,000
HINDU UNIVERSITY OF AMERICA INC 5200 VINELAND RD STE 200 ORLANDO,FL 32811	N/A	PC	Teachers Empowerment on Hindu Dharma	10,000
INSTITUTE OF ADVANCED SCIENCES 86 FAUNCE CORNER RD NORTH DARTMOUTH,MA 02747	N/A	PC	Uberoi Indic Studies program 2014	40,000
INSTITUTE OF ADVANCED SCIENCES 86 FAUNCE CORNER RD NORTH DARTMOUTH,MA 02747	N/A	PC	Vedic Tradition Program	9,978
LOYOLA MARYMOUNT UNIVERSITY 1 LMU DR STE 2800 LOS ANGELES,CA 90045	N/A	PC	Master's of Arts in Yoga Studies	17,500
REGENTS OF THE UNIVERSITY OF MICHIGAN 3003 S STATE ST ANN ARBOR,MI 48109	N/A	PC	Indian Religions Encyclopedia	4,000
REGENTS OF THE UNIVERSITY OF MICHIGAN 3003 S STATE ST ANN ARBOR,MI 48109	N/A	PC	Teaching Sikhism	18,000
UNIVERSITY OF COLORADO FOUNDATION 1800 N GRANT ST STE 725 DENVER,CO 80203	N/A	PC	Annual Lecture Series in Buddhist Studies at the University of Colorado and Naropa University	4,000
Total ▶ 3a				212,478

TY 2014 Compensation Explanation**Name:** The Uberoi Foundation for Religious Studies**EIN:** 26-6101307

Person Name	Explanation
James Polsfut	James Polsfut, Treasurer, was paid \$40,000 by the Foundation in his capacity as Executive Director during 2014. This compensation is reported on Part I, Line 16c to be consistent with the character of the expense.

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2014 Depreciation Schedule

Name: The Uberoi Foundation for Religious Studies

EIN: 26-6101307

TY 2014 Investments Corporate Bonds Schedule

Name: The Uberoi Foundation for Religious Studies

EIN: 26-6101307

Name of Bond	End of Year Book Value	End of Year Fair Market Value
AIR CANADA - 4.125% - 11/15/20	14,377	14,427
AIR LEASE CORP - 4.250% - 09/1	9,866	10,075
AMERICAN CAMPUS CMNTYS OPER -	20,031	19,965
AMERICAN EXPRESS - 3.625% - 12	14,962	15,125
ARES CAPITAL CORP BOND - 4.875	15,018	15,771
ASPEN INS HLDGS LTD SR NT - 4.	14,985	15,580
ASSET BACKED SECS SER 2001-HE2	23,240	25,069
AUTONATION INC NT - 5.500% - 0	16,657	16,451
AVALONBAY COMMUNITIES - 3.500%	19,885	19,993
AVIATION CAPITAL GRPNOTE 144A	16,399	16,988
BANK OF AMERICA - 4.250% - 10/	4,976	4,989
BEAR STEARNS ALT-A SER 2003-6	25,910	25,630
CONTINENTAL RES - 5.00% - 09/1	10,159	9,675
CROWN CASTLE TOWERS - 4.883% -	25,865	27,480
CS FIRST BOSTON - 2.579% - 10/	21,391	21,635
CS FIRST BOSTON MTG SER 2003-1	13,655	13,734
DCT INDL OPER PARTNERSHIP LP -	10,301	10,414
DIRECTV HOLDINGS/FING - 4.450%	15,463	15,695
ESSEX PORTFOLIO - 3.875% - 05/	14,890	15,266
FIDELITY NATL INFORMATION SVCS	14,946	15,152

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FIRST AMERICAN FIN - 4.600% -	4,999	5,069
GTP CELLULAR SITES LLC 144A -	25,620	25,080
HEALTHCARE TRUST OF AMER - 3.7	14,888	14,837
ICAHN ENT LP/CORP - 4.875% - 0	20,150	19,950
IMPAC CMB TR - 0.552% - 05/25/	29,950	29,820
IMPAC CMB TR 2007 CL A 0.40550	30,069	30,418
INTERNATIONAL LEASE FINCE NOTE	10,813	11,200
JP MORGAN ACCEPT SER 2004-A3 C	27,364	27,464
LENDER PROCESSING SVCS INC - 5	15,946	15,750
MARRIOTT INTL INC - 3.3750% -	19,889	20,476
MASTER ASSET - 5.500% - 09/25/	14,225	14,090
MASTR SPECIALIZED SER 2005-3 C	16,688	17,137
MORGAN STANLEY SR NT-F - 5.50%	11,248	11,282
QVC INC SR SECD - 5.125% - 07/	5,175	5,262
REPUBLIC SVCS INC SR NT - 5.25	16,348	16,984
RESIDENTIAL FUNDING-03.750%-12	19,614	19,604
RLI CORP BOND - 04.87500% - 09	14,961	15,804
ROCKWOOD SPECIALTIES GRP - 4.6	15,595	15,488
SMALL BUS ADMIN GTD DEV - 5.51	11,738	11,516
SMALL BUS ADMIN GTD DEV PTC -	35,535	34,585

Name of Bond	End of Year Book Value	End of Year Fair Market Value
STRUCTURED ASSET SER 1999-SP1	18,014	17,728
TIA ASSET MGMT - 4.125% - 11/0	4,994	5,122
US AIRWAYS TRUST SER 4.625% -	14,281	14,265
VERIZON COMMUNICATIONS INC - 4	14,983	16,286
WEBSTER FINANCIAL CORP - 04.37	19,848	20,527
WESTLAKE CHEM CORP - 3.60% - 0	19,983	19,774
WILLIAMS PARTNERS - 4.00% - 11	19,926	20,049

TY 2014 Investments Corporate
Stock Schedule

Name: The Uberoi Foundation for Religious Studies
EIN: 26-6101307

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABBOTT LABS	9,684	13,101
ACCENTURE PLC	4,142	6,162
AEGON N V ORD AMER REG	20,050	17,250
ALLIANZ SE ADR	16,912	19,056
AMERICAN SOFTWARE INC	9,639	9,174
AMERICAN TOWER REIT INC	4,161	13,740
ANHEUSER BUSCH COS INC	7,611	12,243
ANHEUSER BUSCH INBEV SPONSORED	7,834	14,040
ARTISAN PARTNERS ASSET MANAGEM	17,317	18,191
ATLAS COPCO AB B SHS ADR	8,289	12,735
AUTOMATIC DATA PROCESSING INC.	4,094	6,670
AXA ADS	8,765	8,584
BADGER METER, INC	12,190	20,238
BALCHEM CORP	5,916	13,328
BANK OF HAWAII CORP	14,937	15,480
BASF AG SPONS ADR	12,641	12,925
BAXTER INTERNATIONAL INC.	9,386	11,946
BAYERISCHE MOTOREN WERKE	15,892	25,646
BLACKROCK INC	6,251	12,872
BNP PARIBAS SPONS ADR	8,509	8,080
BOC HK HLDGS LTD S/ADR	7,610	11,727
BRITISH AMERICAN TOBACCO PLC	5,526	11,860
BROOKFIELD ASSET MANAGEMENT CL	8,540	13,034
BT GROUP PLC ADS	16,922	35,644
CABOT MICROELECTRONICS CORPORA	13,795	17,130
CANADIAN PACIFIC RAILWAY LTD	5,093	13,488
CASS INFORMATION SYSTEMS, INC	12,006	21,992
CELGENE CORP	4,445	15,213
CHARLES SCHWAB CORP	5,613	13,344
CHEESECAKE FACTORY INC	15,005	16,602

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CHEVRON CORP	7,785	10,433
CINEMARK HOLDINGS INC	17,775	20,459
CLARCOR INC	13,100	21,658
COGNEX CORPORATION	5,844	13,556
COHEN & STEERS INTERN RLTY - I	106,643	113,415
COMPUTER SERVICES INC	6,198	10,808
COPA HOLDINGS S.A.	13,676	12,955
CORPORATE EXEC BOARD CO	14,401	27,271
CVS CAREMARK CORP.	11,253	13,676
DAIWA SECURITIES GROUP	14,404	15,048
DANAHER CORP	5,706	12,599
DBS GROUP HLDGS SPON ADR	19,114	29,559
DISCOVERY COMMUNICATIONS CL A	9,108	9,612
EBAY INC.	5,521	5,612
ECOLAB INC	4,726	11,393
ESTEE LAUDER COMPANIES INC	6,732	11,887
FIRST CASH FINL SERVICES INC	16,087	21,990
FIRST WESTERN SHORT DURATION B	683,677	679,135
GILEAD SCIENCES INC	3,736	14,516
GRACO INC	12,063	28,063
GRAN TIERRA ENERGY INC	9,749	5,005
HALLIBURTON COMPANY	6,984	9,046
HEARTLAND PYMT SYS	12,107	14,620
HENRY JACK & ASSOC INC.	11,816	25,540
HITACHI LTD	17,095	19,758
HOME RETAIL GRP PLC ADR	10,259	9,540
HONDA MOTOR CO LTD	11,146	9,594
HONEYWELL INTERNATIONAL INC.	7,108	12,590
HSBC HOLDINGS PLC	14,019	12,988
HUANENG POWER INTL	20,362	24,377

Name of Stock	End of Year Book Value	End of Year Fair Market Value
IBERDROLA ADR	6,964	6,728
ING GROUP N V SPONSORED ADR	27,292	26,589
INTERNATIONAL BUSINESS MACHINE	8,478	9,787
INTESA SANPAOLO SPA	9,771	8,227
INTUIT	3,934	6,914
ISHARES RUSSELL 2000	118,872	164,478
ISHARES TR S & P MIDCAP 400 IN	165,959	240,078
JPMORGAN DIVERSIFIED MID CAP G	69,988	86,870
KOHL'S CORP	4,910	6,287
LAFARGE ADS	7,008	7,848
LANDSTAR SYSTEM	13,119	24,660
LONZA GROUP AG UNSP/ADR	8,494	12,287
MAGNA INTERNATIONAL INC.	23,530	35,868
MCDONALD'S CORP	11,645	11,244
MICROSOFT CORPORATION	8,523	14,957
MONOTYPE IMAGING HOLDINGS INC.	12,081	12,829
MONSANTO CO	3,772	6,093
NATIONAL BEVERAGE CORP	11,002	16,603
NATIONAL GRID TRANSCO PLC	7,112	9,892
NESTLE S.A.	19,483	32,973
NIKE INC-CL B	6,699	14,230
NISSAN MOTOR LTD ASR	15,017	14,850
NOVARTIS AG ADR	9,684	17,605
NOVO NORDISK A S	14,372	21,160
NUVEEN REAL ESTATE SECURITIES	178,534	191,255
NXP SEMICONDUCTORS	14,665	16,808
OPPENHEIMER DEVELOPING MARKETS	351,557	370,233
ORACLE CORP	6,252	13,671
ORANGE	19,876	22,419
ORIX CORP ADS	15,991	20,322

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PANASONIC CORP	18,368	17,655
PATTERSON COMPANIES INC COM	17,935	20,683
PEPSICO INC	8,784	13,049
PIMCO COMMODITY REAL RETURN ST	335,903	285,022
PRIMERICA, INC.	16,801	20,890
QUALCOMM INC	8,113	11,521
QUESTAR CP	19,870	20,982
R L I CP	13,837	24,206
RBC BEARINGS INCORPORATED	9,467	9,357
RIO TINTO PLC SPONSORED ADR	9,844	8,751
ROCHE HOLDING LTD ADR	11,933	19,034
ROPER INDUSTRIES	3,476	6,410
ROYAL DUTCH SHELL PLC	22,371	20,755
SANDS CHINA LTD UNSP ADR	9,644	7,880
SANOFI-AVENTIS SPONSORED ADR	21,396	25,131
SAP AKTIENGESELL ADS	7,505	8,706
SCHLUMBERGER LTD	8,917	11,274
SEKISUI HOUSE LTD	9,162	8,567
SEVEN & I HOLDINGS C	16,770	17,669
SHIRE PLC	20,442	36,132
SIEMENS A G ADR OLD	7,149	7,941
SPDR S&P EMERGING MARKETS SMAL	19,859	17,736
STATE STREET CORPORATION	6,696	11,932
STRYKER CORPORATION	7,540	13,961
SUN HYDRAULICS CORPORATION	5,230	6,498
SUNCOR ENERGY INC	15,736	14,301
SWEDBANK AB S/ADR	8,179	11,210
SYNTEL INC	9,797	24,289
TECHTRONIC INDS SPD ADR	18,213	22,568
TEXAS INSTRUMENTS INC.	6,407	14,170

Name of Stock	End of Year Book Value	End of Year Fair Market Value
THERMO FISHER SCIENTIFIC INC	5,266	12,529
TJX COMPANIES INC	5,691	7,132
TOTAL FINA ELF S.A.	30,908	21,248
UNITED PARCEL SERVICE	8,482	12,451
VALEO SA SPONS ADR	15,279	37,158
VANGUARD FTSE DEVELOPED MARKET	163,699	185,271
VANGUARD S&P 500 ETF	255,340	386,786
VILLAGE SUPER MARKET INC	5,568	4,379
VISA INC	2,721	6,817
WD-40 COMPANY	14,007	30,629
WESTAMERICA BANCORPORATION	14,747	15,441
WILLIAMS COS	8,755	13,078
WISDOMTREE EUROPE SMALLCAP DIV	9,749	9,007
WOLVERINE WORLDWIDE	18,024	20,482

TY 2014 Investments Government Obligations Schedule

Name: The Uberoi Foundation for Religious Studies

EIN: 26-6101307

**US Government Securities - End of
Year Book Value:**

483,920

**US Government Securities - End of
Year Fair Market Value:**

479,908

**State & Local Government
Securities - End of Year Book
Value:**

21,842

**State & Local Government
Securities - End of Year Fair
Market Value:**

21,552

TY 2014 Investments - Other Schedule

Name: The Uberoi Foundation for Religious Studies

EIN: 26-6101307

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
AETOS CAPITAL DISTRESSED INV S		64,882	98,050
AETOS CAPITAL LONG/SHORT STRAT		178,172	232,058
AETOS CAPITAL MULTI-STRATEGY A		103,981	129,580
ALTIUS ASSOC PRIVATE EQUITY FU		705,228	920,839
BRIGHTWOOD CAPITAL SBIC II LP		68,816	69,144
FWCM INCOME EQUITY FUND LP		230,680	278,578

TY 2014 Other Expenses Schedule

Name: The Uberoi Foundation for Religious Studies

EIN: 26-6101307

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative Fees	33,120			33,120
Bank Charges	527	527		
K-1 Exp ALTIUS ASSOC PRIVATE E	23,479	22,903		
K-1 Exp BRIGHTWOOD CAPITAL SBI	5,538	5,538		
K-1 Exp FWCM HIGH YIELD CAPITA	1,752	1,752		
K-1 Exp FWCM INCOME EQUITY FUN	5,904	5,904		
OTHER EXPENSE	30			30
Storage Fee	1,303			1,303

TY 2014 Other Income Schedule

Name: The Uberoi Foundation for Religious Studies

EIN: 26-6101307

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
K-1 Inc/Loss ALTIUS ASSOC PRIVATE EQUITY FUND LP	55,447	52,161	
K-1 Inc/Loss BRIGHTWOOD CAPITAL SBIC II LP	11,019	11,019	
K-1 Inc/Loss FWCM HIGH YIELD CAPITAL APPRECIATION	10,976	10,976	
K-1 Inc/Loss FWCM INCOME EQUITY FUND LP	8,719	13,189	

TY 2014 Other Increases Schedule

Name: The Uberoi Foundation for Religious Studies

EIN: 26-6101307

Description	Amount
RETURNED GRANT	12,483

TY 2014 Other Professional Fees Schedule**Name:** The Uberoi Foundation for Religious Studies**EIN:** 26-6101307

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Management Services	66,512	66,512		
EXECUTIVE DIRECTOR	40,000			40,000
TEACHER TRAINING STIPENDS	6,100			6,100
HONORARIA FEES	1,000			1,000
GRAPHIC/WEB DESIGN	598			598

TY 2014 Taxes Schedule

Name: The Uberoi Foundation for Religious Studies

EIN: 26-6101307

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
990-PF Estimated Tax for 2014	4,700			
Foreign Tax Paid	4,596	4,596		
990-T TAX FOR 2012	3,372			
STATE INCOME TAX 2013	66			