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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 WR Berkley Corporation Charitable Foundation % Foundation Source		A Employer identification number 36-4516560	
Number and street (or P O box number if mail is not delivered to street address) Foundation Source 501 Silverside Rd Suite 123		B Telephone number (see instructions) (800) 839-1754	
City or town, state or province, country, and ZIP or foreign postal code Wilmington, DE 198091377		C If exemption application is pending, check here ▶ <input type="checkbox"/>	
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 ▶ <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ <input type="checkbox"/>	
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 ▶ <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 412,876		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</small>		(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)	626,321			
	2 Check ▶ <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	36	36		
	4 Dividends and interest from securities.				
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	_____			
	b Gross sales price for all assets on line 6a _____				
	7 Capital gain net income (from Part IV, line 2) . . .		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)	_____			
	11 Other income (attach schedule)	_____			
	12 Total. Add lines 1 through 11	626,357	36		
	13 Compensation of officers, directors, trustees, etc				
	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)	_____			
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	_____			
	19 Depreciation (attach schedule) and depletion . . .	_____			
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	3,380	25		3,355
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	3,380	25		3,355
	25 Contributions, gifts, grants paid	520,396			520,396
	26 Total expenses and disbursements. Add lines 24 and 25	523,776	25		523,751
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	102,581			
	b Net investment income (if negative, enter -0-)		11		
	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	309,795	412,876	412,876
	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)			
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	309,795	412,876	412,876
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	309,795	412,876	
	30	Total net assets or fund balances (see instructions)	309,795	412,876	
	31	Total liabilities and net assets/fund balances (see instructions) . . .	309,795	412,876	

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)	1 309,795
2	Enter amount from Part I, line 27a	2 102,581
3	Other increases not included in line 2 (itemize) ▶ _____	3 500
4	Add lines 1, 2, and 3	4 412,876
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 .	6 412,876

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				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (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				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss) <div>If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</div>		2	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) <div>If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8</div>		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	463,930	259,178	1 790005	
2012	382,508	265,030	1 443263	
2011	368,618	235,355	1 566221	
2010	387,635	334,383	1 159255	
2009	331,919	177,981	1 864913	
2	Total of line 1, column (d).		2	7 823657
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	1 564731
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.		4	341,065
5	Multiply line 4 by line 3.		5	533,675
6	Enter 1% of net investment income (1% of Part I, line 27b).		6	
7	Add lines 5 and 6.		7	533,675
8	Enter qualifying distributions from Part XII, line 4.		8	523,751
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions				

Part VI

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		
	Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	0
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	0
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	0
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	
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	0
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2015 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A

Statements 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	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
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>	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? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
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>	5	Yes	
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
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>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> DE _____			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	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)? <i>If "Yes," complete Part XIV</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	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). 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.			
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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?	5b		
	Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>		
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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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
William R Berkley	Pres / Dir	0		
Foundation Source 501 Silverside Rd Wilmington, DE 198091377	1 0			
William R Berkley Jr	VP / Dir / Treas	0		
Foundation Source 501 Silverside Rd Wilmington, DE 198091377	1 0			
Josephine A Raimondi	VP / Dir / Sec	0		
Foundation Source 501 Silverside Rd Wilmington, DE 198091377	1 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
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	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	0
b	Average of monthly cash balances.	1b	346,259
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	346,259
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	346,259
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	5,194
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	341,065
6	Minimum investment return. Enter 5% of line 5.	6	17,053

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	17,053
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	0
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	0
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	17,053
4	Recoveries of amounts treated as qualifying distributions.	4	500
5	Add lines 3 and 4.	5	17,553
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	17,553

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	523,751
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	523,751
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	523,751

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			
2		Undistributed income, if any, as of the end of 2014			
a		Enter amount for 2013 only.			
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 \$ 523,751			
a		Applied to 2013, but not more than line 2a			
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.			
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			
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.			
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.			
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 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	520,396
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

[illegible]

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?			Yes	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				

[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

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	*****	2015-05-12	*****	<div style="border: 1px solid black; padding: 5px;"> May the IRS discuss this return with the preparer shown below (see instr)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No </div>
	Signature of officer or trustee	Date	Title	

Paid Preparer Use Only	Print/Type preparer's name Jeffrey D Haskell	Preparer's Signature	Date	Check if self-employed <input checked="" type="checkbox"/>	PTIN P01345770
	Firm's name <input checked="" type="checkbox"/> Foundation Source			Firm's EIN <input checked="" type="checkbox"/>	
	Firm's address <input checked="" type="checkbox"/> One Hollow Ln Ste 212 Lake Success, NY 11042			Phone no (800) 839-1754	


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>				
A COMPANY OF GIRLS PO BOX 7527 PORTLAND, ME 04112	N/A	PC	After School Program	4,000
AAMGA EDUCATION FOUNDATION 150 S WARNER RD STE 156 KING OF PRUSSIA, PA 19406	N/A	PC	General & Unrestricted	5,000
ABBY KELLEY FOSTER HOUSE INC 52 HIGH ST WORCESTER, MA 01609	N/A	PC	Women's Center Program	1,900
ALZHEIMERS DISEASE & RELATED DISORDERS ASSociation 4 PINE W PLZ ALBANY, NY 12205	N/A	PC	Northeastern NY Chapter Community and Family Education Program	1,500
ALZHEIMERS DISEASE & RELATED DISORDERS ASSOCIATIon 441 W KIRKPATRICK ST SYRACUSE, NY 13204	N/A	PC	Central NY Chapter Community and Family Education Program	1,500
AMERICAN CANCER SOCIETY 6525 N MERIDIAN AVE Oklahoma City, OK 73116	N/A	PC	General & Unrestricted	250
AMERICAN CANCER SOCIETY INC - MIDWEST DIVISION 905 E HWY 30 CARROLL, IA 51401	N/A	PC	General & Unrestricted	2,500
AMERICAN CANCER SOCIETY INC - SAN DIEGO 2655 CAMINO DEL RIO N STE 100 SAN DIEGO, CA 92108	N/A	PC	General & Unrestricted	5,000
AMERICAN DIABETES ASSOCIATION - IOWA AREA 2600 72ND ST STE O URBANDALE, IA 50322	N/A	PC	General & Unrestricted	2,500
AM ENTERPRISE INSTITUTE FOR PUBLIC POLICY REsearch 1150 17TH ST NW WASHINGTON, DC 20036	N/A	PC	General & Unrestricted	7,500
AMERICAN HEART ASSOCIATION 10060 BUFFALO SPEEDWAY HOUSTON, TX 77054	N/A	PC	General & Unrestricted	1,000
AMERICAN HEART ASSOCIATION 4217 PARK PL COURT GLEN ALLEN, VA 23060	N/A	PC	General & Unrestricted	200
AMERICAN HEART ASSOCIATION 444 LIBERTY AVE STE 130 PITTSBURGH, PA 15222	N/A	PC	General & Unrestricted	1,750
AMERICAN HEART ASSOCIATION 210 MALABU DR STE 125 LEXINGTON, KY 40503	N/A	PC	General & Unrestricted	1,500
AMERICAN HEART ASSOCIATION INC 1449 MEDICAL PARK DR BIRMINGHAM, AL 35213	N/A	PC	General & Unrestricted	5,000
Total  3a				520,396


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>				
AMYOTROPHIC LATERAL SCLEROSIS ASSN 1275 K ST NW STE 250 WASHINGTON,DC 20005	N/A	PC	General & Unrestricted	250
APPALACHIAN STATE UNIVERSITY - BRANTLEY RISK & Ins THELMA C RALEY HALL ASU BOX 32058 BOONE,NC 28608	N/A	PC	General & Unrestricted	5,000
ASSISTANCE LEAGUE OF BOISE IDAHO INC PO BOX 140104 GARDEN CITY,ID 83714	N/A	PC	General & Unrestricted	1,000
ATLAS OF ROCK COUNTY PO BOX 922 LUVERNE,MN 56156	N/A	PC	General & Unrestricted	3,000
AUTISM SPEAKS INC 1 E 33RD ST 4TH FL NEW YORK,NY 10016	N/A	PC	General & Unrestricted	1,000
BAYPATH ELDER SERVICES INC 33 BOSTON POST RD W 5TH FL MARLBOROUGH,MA 01752	N/A	PC	Nutrition Services Program	1,800
BOY SCOUTS OF AMERICA 3120 RAINIER AVE S SEATTLE,WA 98144	N/A	PC	General & Unrestricted	5,000
BOYS & GIRLS CLUBS OF SOUTHERN MAINE 277 CUMBERLAND AVE PORTLAND,ME 04101	N/A	PC	Passport to Manhood Program	4,500
BOYS AND GIRLS CLUBS OF METROWEST INC 169 PLEASANT ST MARLBORO,MA 01752	N/A	PC	Project Learn	1,900
BOYS CLUB OF MT VERNON N Y INC 350 S 6TH AVE MOUNT VERNON,NY 10550	N/A	PC	General & Unrestricted	650
BOYS CLUB OF NEWYORK INC 287 E 10TH ST NEWYORK,NY 10009	N/A	PC	General & Unrestricted	2,500
BRAIN TUMOR FOUNDATION FOR CHILDREN INC 6065 ROSWELL RD STE 505 ATLANTA,GA 30328	N/A	PC	General & Unrestricted	1,000
BRIDGE STEPS 1818 CORSICANA ST DALLAS,TX 75201	N/A	PC	General & Unrestricted	1,918
CASA FOR LANCASTER COUNTY 315 S 9TH ST STE 213 LINCOLN,NE 68508	N/A	PC	General & Unrestricted	1,500
CASCADE VALLEY HOSPITAL HEALTH FOUNDATION 330 S STILLAGUAMISH AVE ARLINGTON,WA 98223	N/A	PC	Disaster Relief Oso Slide Fund	2,845
Total  3a				520,396


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 Paid during the year				
CENTER FOR FOOD ACTION IN NEW JERSEY 192 A W DEMAREST AVE ENGLEWOOD,NJ 07631	N/A	PC	Weekend Snack Pack Program	500
CENTRAL PENNSYLVANIA FOOD BANK 3908 COREY RD HARRISBURG,PA 17109	N/A	PC	General & Unrestricted	500
CHARITABLE ASSISTANCE TO COMMUNITYS HOMELESS 503 S AMERICANA BLVD BOISE,ID 83702	N/A	PC	General & Unrestricted	5,000
CHAVES COUNTY CANCER FUND INC PO BOX 193 ROSWELL,NM 88202	N/A	PC	Walk for Hope Fund	500
CHILDRENS FRIEND INC 21 CEDAR ST WORCESTER,MA 01609	N/A	PC	General & Unrestricted	2,500
CHILDSERV 8765 WHIGGINS RD STE 450 CHICAGO,IL 60631	N/A	PC	General & Unrestricted	100
CIVIC BUILDERS INC 304 HUDSON ST 3RD FL NEW YORK,NY 10013	N/A	PC	General & Unrestricted	5,000
COMMUNITY CHEST OF ENGLEWOOD 310 ENGLE ST ENGLEWOOD,NJ 07631	N/A	PC	General & Unrestricted	750
COURT APPOINTED SPECIAL ADVOCATE CASA 212 WASHINGTON ST ROOM 1276 NEWARK,NJ 07102	N/A	PC	General & Unrestricted	500
COWBOYS FOR CANCER RESEARCH INC PO BOX 202 DONA ANA,NM 88032	N/A	PC	General & Unrestricted	500
CRIPPLED CHILDRENS FOUNDATION 2019 4TH AVE N STE 101 BIRMINGHAM,AL 35203	N/A	PC	General & Unrestricted	2,500
CYSTIC FIBROSIS FOUNDATION 2302 PARKLAKE DR NE STE 210 ATLANTA,GA 30345	N/A	PC	General & Unrestricted	1,000
DEREK HUGHES NAPSLO EDUCATIONAL FOUNDATION INC 4131 N MULBERRY DR STE 200 KANSAS CITY,MO 64116	N/A	PC	General & Unrestricted	1,500
DEREK HUGHES NAPSLO EDUCATIONAL FOUNDATION INC 4131 N MULBERRY DR STE 200 KANSAS CITY,MO 64116	N/A	PC	Michael Snead Scholarship Fund	15,000
DES MOINES AREA RELIGIOUS COUNCIL 1435 MULBERRY ST DES MOINES,IA 50309	N/A	PC	Food Pantry Network and Housing Stability Fund	5,000
Total  3a				520,396


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 Paid during the year				
DRAVET SYNDROME FOUNDATION INC PO BOX 16536 WEST HAVEN,CT 06516	N/A	PC	General & Unrestricted	600
DRESS FOR SUCCESS WORCESTER INC 484 MAIN ST WORCESTER,MA 01608	N/A	PC	Career Center Program	1,900
EASTER SEALS NEW HAMPSHIRE INC 555 AUBURN ST MANCHESTER,NH 03103	N/A	PC	Veterans Count Program	4,200
ENVISION UNLIMITED 8 S MICHIGAN 17TH FL CHICAGO,IL 60603	N/A	PC	General & Unrestricted	1,500
FAMILY CENTERS INC PO BOX 7550 GREENWICH,CT 06836	N/A	PC	Literacy Volunteers Program - Scrabble Tournament	10,000
FAMILY PROMISE OF GREATER NASHUA INC 180 LOWELL RD HUDSON,NH 03051	N/A	PC	Anne-Marie House Project	5,000
FEED MY STARVING CHILDREN 401 93RD AVE NW COON RAPIDS,MN 55433	N/A	PC	General & Unrestricted	500
FOOD BANK OF LINCOLN INC PO BOX 29228 LINCOLN,NE 68529	N/A	PC	General & Unrestricted	1,500
FOREIGN POLICY ASSOCIATION INCORPORATED 470 PARK AVE S FRNT 2 NEW YORK,NY 10016	N/A	PC	General & Unrestricted	15,000
FRIENDS OF MIDDLETOWN ROBOTICS ORGANIZATION 364 E MAIN ST STE 210 MIDDLETOWN,DE 19709	N/A	PC	General & Unrestricted	1,000
FRIENDSHIP HOME OF LINCOLN PO BOX 85358 LINCOLN,NE 68501	N/A	PC	General & Unrestricted	1,500
FRIENDSHIP SERVICE CENTER INC PO BOX 1896 NEW BRITAIN,CT 06051	N/A	PC	General & Unrestricted	1,775
FRIENDSHIP SERVICE CENTER INC PO BOX 1896 NEW BRITAIN,CT 06051	N/A	PC	Transitional Living Center Program	1,200
GEORGIA STATE UNIVERSITY RISK MANAGEMENT Fdn PO BOX 4036 ATLANTA,GA 30302	N/A	PC	General & Unrestricted	1,000
GREATER MARLBORO PROGRAMS INCORPORATED 65 BOSTON POST RD WSTE 220 MARLBORO,MA 01752	N/A	PC	Community Living Arrangement Program	1,800
Total  3a				520,396


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

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Name and address (home or business)				
a <i>Paid during the year</i>				
GREATER PITTSBURGH COMMUNITY FOOD BANK 1 N LINDEN ST DUQUESNE,PA 15110	N/A	PC	General & Unrestricted	500
GREENWICH HOSPITAL 5 PERRYRIDGE RD GREENWICH,CT 06830	N/A	PC	Greenwich Hospital Endowment Fund, Inc for the Frank A Corvino Scholarship Fund	35,000
HABITAT FOR HUMANITY INTERNATIONAL INC 144 N ANTELOPE VALLEY PKWY LINCOLN,NE 68503	N/A	PC	Family Support Program	1,500
HANDS ON HARTFORD INC 330 MAIN ST HARTFORD,CT 06106	N/A	PC	Community Engagement Program	1,000
HAWTHORN HILL 3001 GRAND AVE DES MOINES,IA 50312	N/A	PC	New Directions Shelter Program	2,000
HEBREW HOME FOR THE AGED AT RIVERDALE FOUNDATION 5901 PALISADE AVE BRONX,NY 10471	N/A	PC	General & Unrestricted	2,500
HENRY FORD HEALTH SYSTEM 1 FORD PL DETROIT,MI 48202	N/A	PC	General & Unrestricted	2,500
HEPHZIBAH CHILDRENS ASSOCIATION 1144 LAKE ST OAK PARK,IL 60301	N/A	PC	General & Unrestricted	5,000
HUNGER FREE VERMONT INC 38 EASTWOOD DR STE 100 S BURLINGTON,VT 05403	N/A	PC	The Learning Kitchen Program	1,500
IDAHO FOODBANK WAREHOUSE 3562 S TK AVE BOISE,ID 83705	N/A	PC	General & Unrestricted	2,500
INTREPID MUSEUM FOUNDATION INC W 46TH ST 12TH AVE NEW YORK,NY 10036	N/A	PC	General & Unrestricted	2,500
IOWA COLLEGE FOUNDATION 505 5TH AVE STE 1034 DES MOINES,IA 50309	N/A	PC	General & Unrestricted	2,500
IOWA SPECIAL OLYMPICS INC 551 SE DOVETAIL RD GRIMES,IA 50111	N/A	PC	General & Unrestricted	2,500
JA WORLDWIDE 200 CONNECTICUT AVE NORWALK,CT 06854	N/A	PC	General & Unrestricted	2,500
JACKIE ROBINSON FOUNDATION INC 75 VARICK ST 2ND FL NEW YORK,NY 10013	N/A	PC	General & Unrestricted	5,000
Total  3a				520,396


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 Paid during the year				
JDRF INTERNATIONAL 26 BROADWAY 14TH FL NEWYORK,NY 10004	N/A	PC	Northern New Jersey & Rockland County Chapter	10,000
JDRF INTERNATIONAL 100 W 10TH ST STE 1103 WILMINGTON,DE 19801	N/A	PC	General & Unrestricted	900
JOBS FOR MAINES GRADUATES INC 45 COMMERCE DR STE 9 AUGUSTA,ME 04330	N/A	PC	Learning Works Program	4,000
JUNIOR ACHIEVEMENT OF CENTRAL IOWA INC 6100 GRAND AVE DES MOINES,IA 50312	N/A	PC	General & Unrestricted	500
JUNIOR ACHIEVEMENT OF LINCOLN INC 285 S 68TH ST NO 508 LINCOLN,NE 68510	N/A	PC	General & Unrestricted	1,000
JUNIOR ACHIEVEMENT OF NORTHERN NEW ENGLAND 400 5TH AVE STE 300 WALTHAM,MA 02451	N/A	PC	Framinham High School Program	1,800
JUNIOR LEAGUE OF GREENWICH CONN INC 231 E PUTNAM AVE GREENWICH,CT 06830	N/A	PC	General & Unrestricted	2,500
KATIES KRUSADERS PO BOX 252 DOYLESTOWN,PA 18901	N/A	PC	General & Unrestricted	500
KIDS CHANCE INC PO BOX 13756 GREENSBORO,NC 27415	N/A	PC	General & Unrestricted	14,165
KIDS CHANCE INC OF PENNSYLVANIA PO BOX 543 POTTSTOWN,PA 19464	N/A	PC	General & Unrestricted	5,900
KIDS CHANCE OF GEORGIA INC 2024 POWERS FERRY RD STE 225 ATLANTA,GA 30339	N/A	PC	General & Unrestricted	8,705
KIDS CHANCE OF MARYLAND INC PO BOX 20262 BALTIMORE,MD 21284	N/A	PC	General & Unrestricted	10,643
KIDS CHANCE OF SOUTH CAROLINA INC PO BOX 2957 GEORGETOWN,SC 29442	N/A	PC	General & Unrestricted	1,892
KIDS CHANCE OF VIRGINIA INC 12701 MARBLESTONE DR STE 250 WOODBRIDGE,VA 22192	N/A	PC	General & Unrestricted	11,745
KIDS IN CRISIS INC 1 SALEM ST COS COB,CT 06807	N/A	PC	Prevention Program	1,000
Total  3a				520,396


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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				
LEUKEMIA & LYMPHOMA SOCIETY - NEBRASKA CHAPTER 12100 W CENTER RD BLDG 1 STE 202 OMAHA,NE 68144	N/A	PC	General & Unrestricted	1,500
LEUKEMIA & LYMPHOMA SOCIETY INC 8033 UNIVERSITY BLVD STE A DES MOINES,IA 50325	N/A	PC	General & Unrestricted	2,500
LIAMS LIGHTHOUSE FOUNDATION 5818 CHARLOIS CT COLORADO SPGS,CO 80922	N/A	PC	General & Unrestricted	300
LITERACY VOLUNTEERS OF BANGOR 200 HOGAN RD BANGOR,ME 04401	N/A	PC	Volunteer Training Program	4,000
LUND FAMILY CENTER INC PO BOX 4009 BURLINGTON,VT 05406	N/A	PC	New Horizons Education Program	3,100
LUVERNE AREA COMMUNITY FOUNDATION PO BOX 623 LUVERNE,MN 56156	N/A	PC	Luverne Food Shelf Program	1,500
LUVERNE AREA COMMUNITY FOUNDATION PO BOX 623 LUVERNE,MN 56156	N/A	PC	Rock County Historical Society	7,500
LYMPHOMA RESEARCH FOUNDATION 115 BROADWAY 13TH FL NEW YORK,NY 10006	N/A	PC	General & Unrestricted	2,500
MAINE ADAPTIVE SPORTS & RECREATION 8 SUNDANCE LN NEWRY,ME 04261	N/A	PC	Veterans no Boundaries Program	3,000
MAKE-A-WISH FOUNDATION OF MISSOURI INC 600 KELLWOOD PKWY CHESTERFIELD,MO 63017	N/A	PC	General & Unrestricted	4,500
MANHATTAN INSTITUTE FOR POLICY RESEARCH INC 52 VANDERBILT AVE NEW YORK,NY 10017	N/A	PC	General & Unrestricted	12,500
MARCH OF DIMES - MEMPHIS TN 5384 POPLAR AVE STE 107 MEMPHIS,TN 38119	N/A	PC	General & Unrestricted	250
MARCH OF DIMES FOUNDATION - CENTRAL JERSEY 2400 MAIN ST STE 1 SAYREVILLE,NJ 08872	N/A	PC	General & Unrestricted	100
MARINE CORPS SCHOLARSHIP FOUNDATION INC 909 N WASHINGTON ST STE 400 ALEXANDRIA,VA 22314	N/A	PC	General & Unrestricted	10,000
MID-OHIO FOODBANK 3960 BROOKHAM DR GROVE CITY,OH 43123	N/A	PC	General & Unrestricted	500
Total  3a				520,396


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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				
MULTIPLE SCLEROSIS RESOURCES OF CENTRAL NEW YORK PO BOX 237 EAST SYRACUSE,NY 13057	N/A	PC	Education Program	1,500
MY PLACE TEEN CENTER INC 755 MAIN ST WESTBROOK,ME 04092	N/A	PC	After School Program	4,000
NATIONAL ASSN FOR PREVENTION OF TEENAGE addiction 61 ARROW RD WETHERSFIELD,CT 06109	N/A	PC	Youth Empowerment Program	1,775
NATIONAL CENTER FOR LEARNING DISABILITIES INC 32 LAIGHT ST APT 2 NEW YORK,NY 10013	N/A	PC	General & Unrestricted	5,000
NATIONAL MULTIPLE SCLEROSIS SOCIETY 200 12TH AVE S MINNEAPOLIS,MN 55415	N/A	PC	General & Unrestricted	125
NATIONAL PARKS CONSERVATION ASSOCIATION 777 6TH ST NW STE 700 WASHINGTON,DC 20001	N/A	PC	General & Unrestricted	10,000
NEBRASKA CHILDRENS HOME SOCIETY INC 4939 S 118TH ST OMAHA,NE 68137	N/A	PC	General & Unrestricted	1,100
NEW HAMPSHIRE FOOD BANK DEPT F PO BOX 9510 MANCHESTER,NH 03108	N/A	PC	Recipe for Success - Culinary Job Training Program	4,200
NEW YORK UNIVERSITY SCHOOL OF MEDICINE ONE PARK AVE 17TH FL NEW YORK,NY 10016	N/A	PC	Urology Research Program	5,000
NORTHEAST FAMILY RESOURCE CENTER 6220 LOGAN AVE LINCOLN,NE 68507	N/A	PC	Academy of Rock Program	1,500
OCEANS HARBOR HOUSE INC PO BOX 622 TOMS RIVER,NJ 08754	N/A	PC	General & Unrestricted	500
OPHELIA'S PLACE INC PO BOX 621 LIVERPOOL,NY 13088	N/A	PC	Family and Friends Support Group - Parent Partner Program	4,025
PAN MASSACHUSETTS CHALLENGE TRUST 77 4TH AVE NEEDHAM,MA 02494	N/A	PC	General & Unrestricted	500
PEER HEALTH EXCHANGE INC 1460 BROADWAY NEW YORK,NY 10036	N/A	PC	General & Unrestricted	2,500
PENOBSCOT THEATRE COMPANY 115 MAIN ST FL 4 BANGOR,ME 04401	N/A	PC	Dramatic Academy Program	3,000
Total  3a				520,396


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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>				
PLUS FOUNDATION 5353 WAYZATA BLVD STE 600 MINNEAPOLIS,MN 55416	N/A	SO I	General & Unrestricted	1,000
POLY PREP COUNTRY DAY SCHOOL 9216 7TH AVE BROOKLYN,NY 11228	N/A	PC	General & Unrestricted	75
PROJECT OPEN HAND-ATLANTA INC 176 OTTLEY DR NE ATLANTA,GA 30324	N/A	PC	General & Unrestricted	1,302
ROAD TRIP HOME ANIMAL RESCUE INC PO BOX 372 ACWORTH,GA 30101	N/A	PC	General & Unrestricted	2,000
ROCK COUNTY OPPORTUNITIES INC PO BOX 626 LIVERNE,MN 56156	N/A	PC	Treadmill Fund	1,000
RUTHERFORD COMMUNITY PANTRY INC 176 PARK AVE RUTHERFORD,NJ 07070	N/A	PC	General & Unrestricted	1,150
RUTHS REUSABLE RESOURCES 39 BLUEBERRY RD PORTLAND,ME 04102	N/A	PC	Literacy Kits & Sustainability Program	2,500
SCIENCE CENTER OF IOWA 401 MARTIN LUTHER KING JR PKWY DES MOINES,IA 50309	N/A	PC	STEM Education Program	1,000
SECOND HARVEST FOODBANK OF SOUTHERN WISCONSIN 2802 DAIRY DR MADISON,WI 53718	N/A	PC	General & Unrestricted	500
SOCIETY OF ST VINCENT DE PAUL SWIDAHO DISTRICT 3217 W OVERLAND RD BOISE,ID 83705	N/A	PC	Food Bank and Community Kitchen Program	5,000
SPIERINGS CANCER FOUNDATION 700 HARVEST TRL APPLETON,WI 54913	N/A	PC	General & Unrestricted	2,500
ST JUDE CHILDRENS RESEARCH HOSPITAL INC 262 DANNY THOMAS PL MSC 509 MEMPHIS,TN 38105	N/A	PC	General & Unrestricted	600
ST MARYS FOOD BANK ALLIANCE 2831 N 31ST AVE PHOENIX,AZ 85009	N/A	PC	General & Unrestricted	6,500
STUDENT CONSERVATION ASSOCIATION INC 4245 N FAIRFIELD DR STE 825 ARLINGTON,VA 22203	N/A	PC	General & Unrestricted	1,000
SUDBURY FOR WOUNDED WARRIORS PO BOX 1166 SUDBURY,MA 01776	N/A	PC	Warriors to Work Program	1,900
Total  3a				520,396

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>				
SUMMER ON THE HILL 4440 TIBBETT AVE RIVERDALE,NY 10471	N/A	PC	General & Unrestricted	500
TEACH FOR AMERICA - CONNECTICUT 370 JAMES ST STE 404 NEW HAVEN,CT 06513	N/A	PC	General & Unrestricted	10,000
TEENS TO TRAILS PO BOX 116 EDGECOMB,ME 04556	N/A	PC	Outing Clubs Program	3,000
TELLING ROOM 225 COMMERCIAL ST STE 201 PORTLAND,ME 04101	N/A	PC	Young Writers and Leaders Program	3,375
THE ALFRED E SMITH MEMORIAL FOUNDATION 1011 1ST AVE STE 1400 New YORK,NY 10022	N/A	PC	General & Unrestricted	2,500
THE BANQUET 900 E 8TH ST SIOUX FALLS,SD 57103	N/A	PC	General & Unrestricted	1,000
THE BRIDGE-A VISION FOR SHARED DOWNTOWN MINISTRY 600 6TH AVE DES MOINES,IA 50309	N/A	PC	The Connections Cafe Program	5,000
THE FOUNDATION FOR MAINE COMMUNITY COLLEGES 323 STATE ST AUGUSTA,ME 04330	N/A	PC	Accelerate ME Program	5,000
THE OPPORTUNITY ALLIANCE 510 CUMBERLAND AVE PORTLAND,ME 04101	N/A	PC	Maine Youth Action Network Program	2,800
THE PARENT PROJECT FOR MUSCULAR DYSTROPHY RESEARCH 401 HACKENSACK AVE 9TH FL HACKENSACK,NJ 07601	N/A	PC	General & Unrestricted	100
THEDACARE FAMILY OF FOUNDATIONS INC PO BOX 1222 APPLETON,WI 54912	N/A	PC	ThedaCare Hospice Foundation Fund	250
TREASURE VALLEY FAMILY YMCA 1177 W STATE ST BOISE,ID 83702	N/A	PC	Strong Kids Campaign	3,000
UNITED CARE USA 613 COLTS NECK CT COLLEYVILLE,TX 76034	N/A	PC	General & Unrestricted	500
UNITED JEWISH APPEAL FED OF JEWISH PHILANTHropies 130 E 59TH ST NEW YORK,NY 10022	N/A	PC	General & Unrestricted	2,500
UNITED WAY OF GREENWICH INC 1 LAFAYETTE COURT GREENWICH,CT 06830	N/A	PC	Greenwich Campership Fund	2,500
Total  3a				520,396

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 Paid during the year				
VETERAN HOMESTEAD INC 69 HIGH ST FITCHBURG,MA 01420	N/A	PC	General & Unrestricted	2,625
VETERANS INC 69 GROVE ST WORCESTER,MA 01605	N/A	PC	Employment and Training Program	1,800
VA COMMONWEALTH UNIVERSITY SCHOOL OF BUSINESS fdn PO BOX 844000 RICHMOND,VA 23284	N/A	PC	General & Unrestricted	1,000
VIRGINIA HOME FOR BOYS AND GIRLS 8716 W BROAD ST HENRICO,VA 23294	N/A	PC	General & Unrestricted	600
VISITING NURSE ASSN OF CHITTENDEN AND GRAND Isle 1110 PRIM RD COLCHESTER,VT 05446	N/A	PC	Parent Child Center Services	1,500
VISITING NURSE SERVICES OF IOWA 1111 9TH ST DES MOINES,IA 50314	N/A	PC	Foster Grandparent Program	1,500
WASHINGTON LEGAL FOUNDATION 2009 MASSACHUSETTS AVE NW WASHINGTON,DC 20036	N/A	PC	General & Unrestricted	15,000
WOMENS CENTER OF GREATER DANBURY CONN INC 2 WST DANBURY,CT 06810	N/A	PC	Community Education Program	1,000
WOMENS CLUB OF SUGARLOAF COUNTRY CLUB CHARITIES 6555 SUGARLOAF PKWY STE 307 DULUTH,GA 30097	N/A	PC	General & Unrestricted	1,000
WWP INC PO BOX 758517 TOPEKA,KS 66675	N/A	PC	General & Unrestricted	10,000
WWP INC - WOUNDED WARRIOR PROJECT INC 4899 BELFORT RD STE 300 JACKSONVILLE,FL 32256	N/A	PC	General & Unrestricted	1,806
YORK COUNTY SHELTER PROGRAMS INC 3 GEORGE RD ALFRED,ME 04002	N/A	PC	Vocational Training Program	2,500
YOUNG WOMENS CHRISTIAN ASSOCIATION OF RICHMOND 6 N 5TH ST RICHMOND,VA 23219	N/A	PC	General & Unrestricted	500
YOUTH HOMES OF MID-AMERICA 7225 NW 58TH ST JOHNSTON,IA 50131	N/A	PC	General & Unrestricted	2,500
Total  3a				520,396

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.</div>	<div>OMB No 1545-0047</div> <div>2014</div>
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<div>Name of the organization</div> <div>WR Berkley Corporation Charitable Foundation</div>	<div>Employer identification number</div> <div>36-4516560</div>
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Organization type (check one)

<div>Filers of:</div> <div>Form 990 or 990-EZ</div>	<div>Section:</div> <div><div><input type="checkbox"/> 501(c)() (enter number) organization</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation</div><div><input type="checkbox"/> 527 political organization</div></div>
<div>Form 990-PF</div>	<div><div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div><div><input type="checkbox"/> 501(c)(3) taxable private foundation</div></div>

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization WR Berkley Corporation Charitable Foundation	Employer identification number 36-4516560
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	WR Berkley Corporation 475 Steamboat Rd Greenwich, CT 06830	\$ 350,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
<u>2</u>	BERKLEY INSURANCE CO 475 STEAMBOAT RD GREENWICH, CT 06830	\$ 276,321	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
<u> </u>		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
<u> </u>		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
<u> </u>		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
<u> </u>		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
<u> </u>		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization WR Berkley Corporation Charitable Foundation	Employer identification number 36-4516560
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Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____

Name of organization WR Berkley Corporation Charitable Foundation	Employer identification number 36-4516560
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Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	

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

TY 2014 Depreciation Schedule

Name: WR Berkley Corporation Charitable
Foundation

EIN: 36-4516560

TY 2014 Other Expenses Schedule

Name: WR Berkley Corporation Charitable
Foundation

EIN: 36-4516560

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative Fees	3,330			3,330
Bank Charges	25	25		
State or Local Filing Fees	25			25

TY 2014 Other Increases Schedule

Name: WR Berkley Corporation Charitable
Foundation
EIN: 36-4516560

Description	Amount
RETURNED GRANT	500