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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
Do not enter social security numbers on this form as it may be made public.

OMB No 1545-0052

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

Open to Public Inspection

_	THE BERN SCHWARTZ FAMILY FOUNDATION  Number and street (or P O box number if mail is not delivered to						Room/suite	47-11418 B Telephone nur	nber (see instructions)
•	141111	er and street (or r O box	Trumber ii maii is i	ior delivered it	o sirect address)		Roominguite	· ·	300) 839 – 1754
1	FOU	NDATION SOURCE	: 501 STLV	ERSIDE 1	RD		123	,	100   035 1734
		r town, state or province,					L.===		
								C If exemption app pending, check h	lication is
1	WIL	MINGTON, DE 19	809-1377					pending, check n	ere
G Check all that apply X Initial return		ırn	Initial return	of a former p	ublic chari	ty D 1 Foreign organ	izations, check here		
			Fınal retu	rn	Amended ref	urn		2 Foreign organ	izations meeting the
	Address change				Name change				k here and attach
ዞ		ck type of organizat			)(3) exempt private f			E If private founda	ition status was terminated
Section 4947(a)(1) nonexempt charitable trust				Other taxable pr			· ·	7(b)(1)(A), check here . ►	
ı	-	market value of a			nting method X Ca	ashAcc	crual	i i	is in a 60-month termination
		of year (from Part II ► \$	, col (c), line 2,154.		er (specify)			under section 50	7(b)(1)(B), check here . ▶
D		Analysis of Rever			lumn (d) must be on cas	n basis j			(d) Disbursements
	et U l	total of amounts in co	lumns (b), (c), a	nd (d)	(a) Revenue and expenses per	(b) Net inve		(c) Adjusted net	for charitable
		may not necessarily e column (a) (see instru		ts ın	books	incon	ne	income	purposes (cash basis only)
Т	1	Contributions, gifts, grants, e		chedule) .	10,000.			·-	(1.2.2.2.2.3)
	2	Chack I If the fo	undation is not re	quired to					
	3	Interest on savings and t			2.		2.		
	4	Dividends and interes	• •						
	5a	Gross rents		[				,	
ļ	b	Net rental income or (los	s)						
임		Net gain or (loss) from s	ale of assets not or	n line 10					
evenue	D	Gross sales price for all assets on line 6a							<u> </u>
힑	7	Capital gain net incor		line 2)			0		
	8	Net short-term capital	gain- ! W.L.L	-70:H					
	9 10 a	Income modifications Gross sales less returns	و و و و و و و و و و و و و و و و و و و	: ·/8} -					
	h	and allowances Less Cost of goods sold	1 2 201	<del>)  &amp; </del>					
		Gross profit of (loss) (		- 12-12					*
ĺ	11	Other income (attach	schedule)						
	12	Total. Add lines 1-thr			10,002.		2.		
	13	Compensation of officers	s, directors, trustee	s, etc	0				
enses	14	Other employee salar	ies and wages	_					
ē	15	Pension plans, emplo			· · · · · · · · · · · · · · · · · · ·				
X	16 a	Legal fees (attach sch	nedule)	-					<del>-</del>
9	b	Accounting ices (atte	ion soneddie,	· · · · -		<u>-</u>			
딁	17	Other professional fe	-				<del></del>		<del>-</del>
St	18	Interest		f			<del></del>		<del> </del>
إجّ	17 18 19 20	Depreciation (attach	• •	· ·				<del></del>	
틍	20	Occupancy	-						-
۲	21	Travel, conferences,							
aŭ	22	Printing and publicati	-						
Б	23	Other expenses (attac	ch schedule) A.T	сн.1	7,848.				7,848
aţi	24	Total operating and	administrative e	expenses.			T		
oer.	23 24 25	Add lines 13 through	23		7,848.				7,848
Ō	ı	Contributions, gifts, g	•		7.040	ļ			
_	26	Total expenses and disburg		24 and 25	7,848.				7,848
	27	Subtract line 26 from			O 1E4				
	1	Excess of revenue over exp		F	2,154.		2.		<del></del>
		Net investment inco Adjusted net income	, ,	· -					<del></del>
 F/		perwork Reduction A	<del></del>		<del> </del>	L			Form <b>990-PF</b> (2014
	1 000		u.uu, ace III						000 11 (2014

	A Deleves Chasta d	ttached schedules and amounts in the	Beginning of year	Er	nd of year
Part I	Balance Sneets a	escription column should be for end-of-year mounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
1	Cash - non-interest-bearing	9			
2		ash investments		2,15	4. 2,154.
3	Accounts receivable ▶				
1		ful accounts >			
4					
		ful accounts ▶			
5					
6		ficers, directors, trustees, and other			
	disqualified persons (attac	ch schedule) (see instructions)			
7	•	ceivable (attach schedule)			
		ful accounts ►			
8 12					
ssets 6 %		erred charges			
		government obligations (attach schedule)			
	· · · · · · · · · · · · · · · · · · ·	tock (attach schedule)			
		oonds (attach schedule)			
11	Investments - land, buildings,				
40	(attach schedule)	ans			
12 13	Investments - mortgage io	h schedule)			
14	Land, buildings, and				
- 1	equipment basis Less accumulated depreciation	on			
15	(attach schedule)	)			
16		completed by all filers - see the			
'"		ge 1, item I)		2,15	4. 2,154.
17		crued expenses			
18	• •				
<u>=</u> 20		s, trustees, and other disqualified persons			
E 21	•	es payable (attach schedule)			
·¬1		>)			
22	Other habilities (describe		·· · · · ·		<del>-  </del>
23	Total liabilities (add lines	17 through 22)	0		d
+		ow SFAS 117, check here . ▶			$\neg$
ses	and complete lines 24	4 through 26 and lines 30 and 31.			
24 25					
E 25	Temporarily restricted .				<del> </del>
일 26	Permanently restricted -				_
a Pund B	check here and comp	not follow SFAS 117, ▶ X lete lines 27 through 31.			
	Capital stock, trust principal	pal, or current funds			
28		and, bldg , and equipment fund			<del>.  </del>
Net Assets 30 30 31	<del>-</del> ·	ated income, endowment, or other funds	ļ	2,15	<del>-  </del>
<u>후</u> 30		balances (see instructions)	0	2,15	94.
31		net assets/fund balances (see		_	
		· · · · · · · · · · · · · · · · · · ·		2,15	94.[
		ges in Net Assets or Fund Bala		<del></del>	<del></del>
		alances at beginning of year - Part			
		d on prior year's return)			1
	ter amount from Part I, I				2,154
		ed in line 2 (itemize) ▶			3
	d lines 1, 2, and 3				4 2,154
5 De	creases not included in	line 2 (itemize) ▶			5
6 To	tal net assets or fund ba	lances at end of year (line 4 minus	s line 5) - Part II, column (	(b), line 30	6 2,154

Part IV Capital	Gains and	Losses for Tax on Inv	estment Income	(b) How		
•	(a) List and describe the kind(s) of property sold (e.g., real estate,				(c) Date acquired	(d) Date sold
	2-story brick w	varehouse, or common stock, 200	shs. MLC Co)	P - Purchase D - Donation	(mo , day, yr )	(mo , day, yr )
<u>1a</u>						ļ
<u>b</u>					_	
<u>C</u>				<del> </del>	<u> </u>	<del></del>
	<del></del>					<del></del>
<u>e</u>		<del></del>	(a) Coat or other book	<u> </u>		
(e) Gross sales pri	ce	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (lo (e) plus (f) mini	
<u>a</u>			<u> </u>			
				-		
<u>c</u>			<del>  - · </del>	-		
Complete only for	ur assets show	and dain in column (b) and owner	ed by the foundation on 12/31/69			
Complete only to	233013 31104		Gains (Col (h) g (k), but not less t			
(i) F M V as of 12/3	1/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		Losses (from co	
_a				ļ		
				<del> </del>		
<u> </u>				<del> </del>		
		<del></del> -		<u> </u>		<del> </del>
<u>e</u>				<del>                                     </del>	· · · · · ·	<del></del>
2 Capital gain net	ncome or (n		f gain, also enter in Part I, line 7	2		
2 Not about form o	anıtal asın sı	•	f (loss), enter -0- in Part I, line 7	-		
		(loss) as defined in sections	structions) If (loss), enter -0- in			
. •		, , ,	• • • • • • • • • • • • • • • • • • • •			
			educed Tax on Net Investment I	ncome		<del></del>
			ne section 4940(a) tax on net invest		ma\	
	able for the	section 4942 tax on the distri	T AVAILABLE FOR INITIAL butable amount of any year in the b			Yes No
		qualify under section 4940(e)			_	
	riate amoun	t in each column for each ye	ar, see the instructions before makii	ng any ent		
(a) Base period years Calendar year (or tax year be		(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets		(d) Distribution r (col (b) divided by	
2013						
2012						
2011						
2010				<u> </u>		· <u> </u>
2009			t .	ļ		
2 Total of line 1, c	olumn (d)		. <b></b>	2		
<ol> <li>Average distribution</li> </ol>	tion ratio for	the 5-year base period - divi	de the total on line 2 by 5, or by the			
number of years	the foundati	on has been in existence if le	ess than 5 years	3		
4 Enter the net va	ue of noncha	arıtable-use assets for 2014 f	from Part X, line 5	4		
				_		
5 Multiply line 4 b	y line 3			5		
6 Enter 1% of net	investment i	ncome (1% of Part I, line 27b)		6	<del></del>	
7 Add lines 5 and	6			7		
8 Enter qualifying If line 8 is equa Part VI instruction	to or great	from Part XII, line 4 er than line 7, check the box	x in Part VI, line 1b, and complete	that part	using a 1% ta	x rate See the
rati vi instructio	112					

here ▶ and enter 1% of Part I, line 27b.  c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)  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 Hz zor or less, enter -0.  5 Credits/Payments  2014 estimated tax payments and 2013 overpayment credited to 2014.  6 Exempt foreign organizations - tax withheld at source.  c Tax paid with application for extension of time to file (Form 8868).  6 Exert any penalty for undersyment of estimated tax. Check here   if Form 2220 is attached.  7 Total credits and payments Add lines 6a through 60.  7 Total credits and payments Add lines 5a drift and the second of the second o		Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see in	<u>nstru</u>	ction	s)
b Domesto Foundations that meet the section 4947(p) requirements in Part V, check here P is and enter 1% for Part I, line 27b. c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, coll (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. 3 Add lines 1 and 2. 5 Tax under section 511 (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. 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 5 Exempt foreign organizations - Law whitheid at source. 6 Exempt foreign organizations - Law whitheid at source. 6 Best control or extension of time 4 from line 3 if zero or less, enter -0. 5 Exempt foreign organizations - Law whitheid at source. 6 Best control organizations - Law whitheid at source. 6 Best control organizations - Law whitheid at source. 7 Total credits and payments. Add lines 6a through 6d. 6 Extension organizations - Law whitheid at source - 6 ded. 7 Total credits and payments. Add lines 6a through 6d. 6 Extension organizations - Law whitheid at source - 6 ded. 7 Total credits and payments. Add lines 6a through 6d. 7 Total credits and payments. Add lines 6a through 6d. 8 Extension organizations - Law whith application or did it part due to 10 lines 5 and 8 is more than line 7, enter amount ower paid. 9 Tax due If the total of lines 5 and 8 is more than line 12 feet from 2220 is attached. 8 Tax due If the total of lines 5 and 8 is more than line 7, enter amount ower paid. 11 Enter the amount of line 10 to be Credited to 2015 estimated tax \( \) = 0 Refunded \( \) 1. 12 Enter the amount of line 10 to be Credited to 2015 estimated tax \( \) = 0 Refunded \( \) 1. 13 Enter the amount of line 10 to be Credited to 2015 estimated tax \( \) = 0 Refunded \( \) 1. 14 Extension in the credit of the foundation attempt to influence any na	1a				
here ▶ and enter 1% of Part I, line 27b.  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 4% of 3 Add lines 1 and 2, 3  3 Add lines 1 and 2, 3  4 Subbitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter 40-) 4  5 Tax based on investment income. Subtract line 4 from line 3 Tize or or less, enter 40-0.  5 Credits/Payments  2014 estimated tax payments and 2013 overpayment credited to 2014.  6 Exempt foreign organizations - tax withheld at Source.  6 Tax paid with application for extension of time to file (Form 8966).  6 Each tax payments and divines 5 and 8 is more than line 7, reter amount ower.  7 Total credits and payments Add lines 6 ath though 6d.  7 Total credits and payments Add lines 6 ath 8 though 6d.  7 Total credits and payments Add lines 5 and 8 is more than line 7, reter amount ower.  9 Tax due if the total of lines 5 and 8 is more than line 7, reter amount overpaid.  10 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, reter amount overpaid.  10 Enter any penalty for underpayment of lines 5 and 8, enter the amount overpaid.  11 Enter the amount of line 10 to be Gredited to 2015 estimated tax ▶  12 Enter the amount of line 10 to be Gredited to 2015 estimated tax ▶  13 Enter the smount of line 10 to be Gredited to 2015 estimated tax ▶  14 Enter the amount of line 10 to be Gredited to 2015 estimated tax ▶  15 Enter the smount of line 10 to be Gredited to 2015 estimated tax ▶  16 Lines the smount of line 10 to be Gredited to 2015 estimated tax ▶  17 Exempt Payment Paymen		Date of ruling or determination letter (attach copy of letter if necessary - see instructions)			
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 4847(a)(1) trusts and taxable foundations only Others enter -0-) 2  3 Add lines 1 and 2	b	Domestic foundations that meet the section 4940(e) requirements in Part V, check			0
Part 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. 3 Add lines 1 and 2. 4 Substite 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 lit zero or less, enter -0 6 Credists/Payments 2014 estimated tax payments and 2013 overpayment credited to 2014. 6 Exempt forceign organizations - tax withheld at source. 6 Tax paid with application for exhension of time to file (Form 8868). 6 Estimated tax payments and 2013 overpayment credited to 2014. 6 Enter any penalty for underpayment of estimated tax. Check here		here  and enter 1% of Part I, line 27b			
3 Add lines 1 and 2	С				
3 Add lines 1 and 2	2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) 2			
S Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0.  6 Credits/Payments 2 2014 estimated tax payments and 2013 overpayment credited to 2014.  6 Exempt foreign organizations. 1ax withheld at source.  6 B b  6 C Tax paid with application for extension of time to file (Form 8868).  6 C Tax paid with application for extension of time to file (Form 8868).  6 C Tax paid with application for extension of time to file (Form 8868).  6 C Tax paid with application for extension of time to file (Form 8868).  6 C Tax paid with application for extension of time of the (Form 8868).  7 Total credits and payments Add lines 6 athrough 6d.  8 Enter any penalty for underpayment of estimated tax. Check here	3	Add lines 1 and 2			
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a 2014 estimated tax payments and 2013 overpayment credited to 2014. 6	5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0			
b Exempt foreign organizations - tax withheld at source	6	Credits/Payments , , ,			
c Tax paid with application for extension of time to file (Form 8868), 6c 8d 4 Backup withholding erroneously withhold 5d 5d 5d 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits and payments Add lines 6a through 6d . 7 Total credits 6d .	а	2014 estimated tax payments and 2013 overpayment credited to 2014 6a			
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7 Total credits and payments. Add lines 6a through 6d. 8 Enter any penalty for underpayment of estimated tax Check here	С	Tax paid with application for extension of time to file (Form 8868) 6c			
7 Total credits and payments. Add lines 6a through 6d. 8 Enter any penalty for underpayment of estimated tax Check here	d	Backup withholding erroneously withheld			
10 Overpayment. If line 7 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8, enter the amount overpaid  10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid  11 Enter the amount of line 10 to be Credited to 2015 estimated tax ▶ 0 Refunded ▶ 11  12 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?.  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?  If the answer is "Yes" to 1a or 1b, attach a defailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities  c Did the foundation file Form 1120-POL for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation P \$ (2) On foundation during the year for political expenditure tax imposed on foundation managers P \$ (2) On foundation during the year for political expenditure tax imposed on foundation managers P \$ (2) On foundation during the year for political expenditure tax imposed on foundation managers P \$ (3) If "Yes," attach de addition engaged in any activities that have not previously been reported to the IRS?  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?  4 Bid the foundation have unrelated business gross income of \$1,000 or more during the year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  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 mandator		Total credits and payments Add lines 6a through 6d			0
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.  11 Enter the amount of line 10 to be Credited to 2015 estimated tax ▶ 0 Refunded ▶ 11	8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8			
The Enter the amount of line 10 to be Cradited to 2015 estimated tax ▶ 0 Refunded 11 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed		_	=.
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?.  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?.  If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities  c Did the foundation file Form 1120-POL for this year?  d Enter the amount (if any) place of tax on political expenditures (section 4955) imposed during the year (1) On the foundation b \$ (2) On foundation managers \$ \$  e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ \$ \$  e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ \$ \$  e Enter the foundation made any changes, not previously reported to the IRS?  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  4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  4b If "Yes," has it filed a tax return on Form 990-T for this year?  5 Was there a liquidation, dissolution, of substantial contraction during the year?  6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either  9 By language in the governing instrument or  9 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 in the governing instrument or  9 By the foundation claiming status as a private operating foundation within the meaning of sect	10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			C
Pes No participate or intervene in any political campagin?	11	Enter the amount of line 10 to be Credited to 2015 estimated tax ▶ 0 Refunded ▶ 11			С
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition?).  If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities  C Did the foundation file Form 1120-POL for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year  (1) On the foundation   S	Pa	rt VII-A Statements Regarding Activities			
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?  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  Did the foundation file Form 1120-POL for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year  (1) On the foundation ▷ \$ (2) On foundation managers ▷ \$  Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▷ \$  Has the foundation engaged in any activities that have not previously been reported to the IRS?  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  b If "Yes," attach a detailed description of the activities  Uses the foundation have unrelated business gross income of \$1,000 or more during the year?  Was there a liquidation, termination, dissolution, or substantial contraction during the year?  Was there a liquidation, termination, dissolution, or substantial contraction during the year?  Was there a liquidation, termination, dissolution or substantial contraction during the year?  Was there a liquidation, termination, dissolution or substantial contraction during the year?  Was there a liquidation, termination, dissolution or substantial contraction during the year?  Was there a liquidation, termination, dissolution or substantial contraction during the year?  Was there a liquidation, termination, dissolution or substantial contraction during the year?  Was there a liquidation, termination, dissolution or substantial contraction during the year?  Was there a liquidation, termination, dissolution or substantial contraction during the year?  Was the the requirements of section	1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	No
Instructions for the definition)?  If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities  C Did the foundation file Form 1120-PDL for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$  Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$  2 Has the foundation engaged in any activities that have not previously been reported to the IRS?  3 Has the foundation made any changes, not previously reported to the IRS?  4 Did the foundation have unrelated business gross income of \$1,000 or more during the year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  6 Are the requirements of section 58(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?  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  8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶  CA, DE,  b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Altorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation  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)? If "Yes," complete Part XIV.  9 Explanation for the state of the activities and complete Part XIV.		participate or intervene in any political campaign?	1a		Х
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities  c Did the foundation flie Form 1120-POL for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year  (1) On the foundation ▶ \$ (2) On foundation managers ▶ \$ (3) On foundation managers ▶ \$ (4) On the foundation managers ▶ \$ (5) On foundation managers ▶ \$ (8) On foundation managers ▶ \$ (9) On the foundation managers ▶ \$ (1) On the foundation managers ▶ \$ (2) On foundation managers ▶ \$ (3) On the foundation of the activities of foundation managers ▶ \$ (4) On the foundation managers ▶ \$ (7) On the foundation managers ▶ \$ (1) On the foundation managers ▶ \$ (2) On foundation managers ▶ \$ (3) On the foundation managers ▶ \$ (4) On the foundati	b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see			
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(or designate) of each state as required by <i>General Instruction G? If "No," attach explanation</i>					
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)? If "Yes," complete Part XIV.	b		1		1
4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV			8b	X	<b>├</b> ─
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Complete variables and a second secon		<del></del>			
			9		<del>  X</del>
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their	10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their	١.	v	
names and addresses ATCH 2		names and addresses . ATCH. Z	<u> </u>	<u> </u>	

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(0)(12) in "Yes" attach schedule (see instructions).  12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory printinged." If "Yes" attach statement (see instructions).  13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  14 The books are name. ► FOUNDATION SOURCE.  15 Section 487(a(1)) increasing the foundation of the public inspection requirements for its annual returns and exemption application?  15 Section 487(a(1)) increasing the foundation in the foundation have an interest in or a signature or other authority over a bark, securities, or other financial account in a foreign country?  16 At any time during calendary rear 2014, did the foundation have an interest in or a signature or other authority over a bark, securities, or other financial account in a foreign country?  16 Set the instructions for exceptions and filing requirements for FincEN Form 114, (formerly TD F 90-22.1) if Yes, enter the name of the foreign country.  18 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.  19 During the year did the foundation (either directly or indirectly)  19 Extra the entire of the property of the second of property with a disqualified person?  19 Extra the entire of the property of the extra the expenses of, a disqualified person?  19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  19 During the year did the foundation (either directly or indirectly)  19 Extra the year did the foundation (either directly or indirectly)  19 Extra the year did the foundation (either directly or indirectly)  19 Extra the year did the foundation (either directly or indirectly)  19 Extra the year did the foundation or	Pai	t VII-A Statements Regarding Activities (continued)			
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).  13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  14 The books are in care of \$\text{PCINDATION}\$ SOURCE.  15 Section 4974(3(1)) nonexemptic charitable trusts fitting Form 950-PF in leu of Form 1041. Check here:  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 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?  18 Set the instructions for exceptions and faling requirements for FinCEN Form 114. (formerly TD F 90-22.1) If Yes, enter the name of the foreign country by the financial account in a foreign country?  19 Dart VII-S Statements Regarding Activities for Which Form 4720 May Be Required  19 Dart VII-S Statements Regarding Activities for Which Form 4720 May Be Required  19 Dart VII-S Statements Regarding Activities for Which Form 4720 May Be Required  19 Dart VII-S Statements Regarding Activities for Which Form 4720 May Be Required  19 Dart VII-S Statements Regarding Activities for Which Form 4720 May Be Required  19 Dart VII-S Statements Regarding Activities for Which Form 4720 May Be Required  19 Dart VII-S Statements Regarding Activities for Which Form 4720 May Be Required  10 Dart VII-S Statements Regarding Activities for Which Form 4720 May Be Required  11 Dart VII-S Statements Regarding Activities for Which Form 4720 May Be Required  12 Dart VII-S Statements Regarding Activities for Which Form 4720 May Be Required  13 Dart VII-S Statements Regarding Activities for Which Form 4720 May Be Required  14 Dart May Be Statements Regarding Activities for Which Form 4720 May Be Requ	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the		İ	
and advisory privileges? If Yes, "attach statement (see instructions).  1 Did the foundation camply with the public inspection requirements for its annual returns and exemption application?  1 The books are in care of ▶ FOUNDATION SOURCE  1 Telephone no ▶ 800-839-1754  1 The books are in Care of ▶ FOUNDATION SOURCE  1 Telephone no ▶ 800-839-1754  1 The books are in Care of ▶ FOUNDATION SOURCE  1 Telephone no ▶ 800-839-1754  1 The books are in Care of ▶ FOUNDATION SOURCE  1 Telephone no ▶ 800-839-1754  1 The books are in Care of ▶ FOUNDATION SOURCE  1 Telephone no ▶ 800-839-1754  1 The books are in Care of ▶ FOUNDATION SOURCE  1 Telephone no ▶ 800-839-1754  1 The books are in Care of ▶ FOUNDATION SOURCE  2 Telephone no ▶ 800-839-1754  1 The books are in Care of ▶ FOUNDATION SOURCE  2 Telephone no ▶ 800-839-1754  1 The books are in Care of ▶ FOUNDATION SOURCE  2 Telephone no ▶ 800-839-1754  1 The books are in Care of ▶ FOUNDATION SOURCE  3 Telephone no ▶ 800-839-1754  1 The books are in Care of ▶ FOUNDATION SOURCE  3 Telephone no ▶ 800-839-1754  1 The books are in Care of ▶ FOUNDATION SOURCE  4 The Source of Poundation (and the Care of Poundation Nave an interest in or a signature or other authority over back securities or other inscribed country.  5 See the instructions for exceptions and filing requirements for FRCEN Form 14. (formerly TD F 90-221) If Yes, and the result of the Care of Poundation for Poundation (either directly or indirectly)  6 The Form 4720 if any item is checked in the Yes' Country, unless an exception applies.  7 The Form 4720 if any item is checked in the Yes' Country, unless an exception applies.  8 The Form 4720 if any item is checked in the Yes' Country, unless an exception applies.  9 The Form 4720 if any item is checked in the Yes' Country, unless and exception applies.  1 During the year of the foundation (either directly or indirectly)  1 The Form 4720 if any item and the Yes' Country in the Yes' Country in the Yes' No (4) Pay companies also or exchange, or lessing of property to a		meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		_X
3 Did the foundation comply with the public imspection requirements for its annual returns and exemption application?	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified	- 1		
Website address ▶ N/A  14. The books are nated are DEONDATION SOURCE.  15. Section 4947(a)(1) nonexempt charable trusts fining Form 980-PF in lieu of Form 1941. Check here.  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. See the instructions for exceptions and filing requirements for FracEN Form 114, (formerly TD F 90-221) If Yes, "lent the named the foreign country".  17. See the instructions for exceptions and filing requirements for FracEN Form 114, (formerly TD F 90-221) If Yes, "lent the named the foreign country".  18. Statements Regarding Activities for Which Form 4720 May Be Required  19. File Form 4720 if any time is checked in the "Yes" country, with a disqualified person?  19. British and the foundation (either directly) or indirectly)  10. Engage in the sale or exchange, or leasing of property with a disqualified person?  10. British goods, services, or facilities to (or accept them from) a disqualified person?  10. Former any income or assets to a disqualified person?  11. See the part of the disqualified person?  12. Former any income or assets to a disqualified person?  13. Furnish goods, services, or facilities to (or accept them from) a disqualified person?  14. Pay compensation to, or pay or reimburse the exponses of, a disqualified person?  15. Traces 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 penied after termination of government service, if terminating within 90 days),  15. If you answer is "Yes to 15(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 heck here.  15. Cold the foundation engage in a prior year in any of the acts fail to qualify under the exceptions described in Regulations section 54941 (a):3 or in a current no		person had advisory privileges? If "Yes," attach statement (see instructions)	12		<u>X</u>
The books are in care of ▶ FOUNDATION SOURCE    Telephone   December   Source   Sou	13		13	Х	
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041. Check here	14		-175	4	
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041. Check here	•	Located at ▶501 SILVERSIDE ROAD, SUITE 123 WILMINGTON, DE ZIP+4 ▶ 19809-13	377_	·	<del></del>
Yes   No over a bank, securities, or other financial account in a foreign country?   No over a bank, securities, or other financial account in a foreign country?   No over a bank, securities, or other financial account in a foreign country   No over a bank, securities, or other financial accountry   No over a bank, securities, or other financial and filing requirements for FinCEN Form 114, (formerly TD F 90-22 1) If   Yes   The first file form 4720 if any item is checked in the "Yes" column, unless an exception applies.   Yes   X   No     Yes   X   No   Yes   X   No   Yes   X   No     Yes   X   No     Yes   X   No     Yes   X   No     Yes   X   No     Yes   X   No   Yes   X   No   Yes   X   Y	15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		. ▶	
see the instructions for exceptions and filing requirements for FaCEN Form 114, (formerly TD F 90-22 1) if  "Yes" enter the name of the foreign country ▶  Part VIES   Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 if any term is checked in the "Yes" column, unless an exception applies.  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?	40		$\neg \neg$	Vac	No
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(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).  (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).  (6) Agree to pay money or property to a government official? (Exception, Check "No" if the foundations section 53 4941(gl-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here.  C Did the foundation dended in section 4942(j)(3) or 4942(j)(5))  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 beginning in 2014?  If "Yes," list the years beginning 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 det	•				
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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)		1 1 1			
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)					
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)		disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the			
foundation had excess business holdings in 2014)					
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4a X  b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?  4b X		the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the			
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			3b		<u> </u>
charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? 4b X			4a		X
				N_PF	

Form 9	90-PF (2014)	THE BERN SCHWA	RTZ FAMILY FO	MOITADNUC	4	7-1141878	Page 6
Par	t VII-B	Statements Regarding Activities	for Which Form	4720 May Be Req	uired (continue	ed)	
5a	During the	year did the foundation pay or incur any amo	unt to				
	(1) Carry	on propaganda, or otherwise attempt to influe	nce legislation (sectio	n 4945(e))?	. Yes X	No	
		ice the outcome of any specific public ele					
	• •	y or indirectly, any voter registration drive?	•	•		No	
		e a grant to an individual for travel, study, or o				No	1
		e a grant to an organization other than a				-	
		1 4945(d)(4)(A)? (see instructions)			_	No	
		e for any purpose other than religious, ch			. — —	]	
		ses, or for the prevention of cruelty to children				No	
h		swer is "Yes" to 5a(1)-(5), did any of the				-	-
b	-	s section 53 4945 or in a current notice regar					
	•	ons relying on a current notice regarding disas	_				<del>-   -</del>
	_						
С		swer is "Yes" to question 5a(4), does the				7 No	
		maintained expenditure responsibility for the			. Lies	J <b>''</b> ''	
	•	ttach the statement required by Regulations sec					
6a		oundation, during the year, receive any fur	-			No	
		nal benefit contract?			. — —	· · · · · · · · · · · · · · · · · ·	x
b		undation, during the year, pay premiums, dire	ectly or indirectly, on a	personal benefit contra	ict7	6b	<del></del>
		6b, file Form 8870				7	
7a		e during the tax year, was the foundation a p					
		id the foundation receive any proceeds or have Information About Officers, Directo					
Pa		and Contractors				Lilipioyees,	
1	List all of	ficers, directors, trustees, foundation r					
		(a) Name and address	(b) Title, and average hours per week	(c) Compensation (If not paid,	(d) Contributions to employee benefit pla	ns (e) Expense	
			devoted to position	enter -0-)	and deferred compens	ation	
				_			0
ATC	н 3	u			4		
	<del>-</del>						
	<b>-</b>						
							<del> </del>
	- <b></b>				<i>≟</i> :		
_	<u> </u>	ation of five highest-paid employees	/athor than the	o included on lin	. 1 inst	uetions) If no	no ontor
2	"NONE."	ation of five nignest-paid employees	(other than thos	se included on iiil	e i - see ilisti	ructions). If the	me, enter
			(b) Title, and average		(d) Contributions		o account
(a)	Name and a	ddress of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benef plans and deferre		
			The state of the s		compensation		
		<del>-</del>					
	NONE				·		
	<b>-</b>						
	<del></del>						
		1			1		
			ļ		<del>-</del>		
		<u> </u>	<u>L</u>	1	L		
Tota	I number o	f other employees paid over \$50,000	<u> </u>	<del> </del>	<del></del>	<b></b>	
						Form <b>99</b> (	<b>)-PF</b> (2014)

Form 990-PF (2014) Page 7 Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, Part VIII and Contractors (continued) Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE." (a) Name and address of each person paid more than \$50,000 (b) Type of service (c) Compensation NONE 0 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 beneficianes served, conferences convened, research papers produced, etc. Expenses Summary of Program-Related Investments (see instructions) Amount Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 All other program-related investments. See instructions 3 NONE Total. Add lines 1 through 3

Part		Minimum Investment Return (All domestic foundations must complete this part. Foreign see instructions)	gn foundations,	
1	Fair	market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purpo	oses		
а		age monthly fair market value of securities	1a	
b	Avera	age of monthly cash balances	1b	3,626.
С		market value of all other assets (see instructions)	1c	
d		(add lines 1a, b, and c)	1d	3,626.
е	Redu	ction claimed for blockage or other factors reported on lines 1a and		
	1c (a	ttach detailed explanation)		
2	Acqu	isition indebtedness applicable to line 1 assets	2	
3			3	3,626.
4	Cash	deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see		
		uctions)	4	54.
5		value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,572.
6	Minir	num investment return. Enter 5% of line 5	6	100.
Part		<b>Distributable Amount</b> (see instructions) (Section 4942(j)(3) and (j)(5) private operating foun and certain foreign organizations check here ▶ and do not complete this part)	dations	
1	Mınır	num investment return from Part X, line 6	1	100.
2 a		on investment income for 2014 from Part VI, line 5		<u></u>
b	Incor	me tax for 2014 (This does not include the tax from Part VI).		
c	Add.	lines 2a and 2b	2c	
3		ibutable amount before adjustments Subtract line 2c from line 1	3	100.
4		overies of amounts treated as qualifying distributions	4	
5		lines 3 and 4	5	100.
6		uction from distributable amount (see instructions)	6	
7		ibutable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII,		
-		1	7	100.
	XII	Qualifying Distributions (see instructions)		
1		unts paid (including administrative expenses) to accomplish charitable, etc., purposes	4.5	7 040
a		enses, contributions, gifts, etc - total from Part I, column (d), line 26	1a   1b	7,848.
	Prog	ram-related investments - total from Part IX-B	10	<del></del>
2		unts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,		
_		oses	2	
3		unts set aside for specific charitable projects that satisfy the		
а	Suita	ability test (prior IRS approval required)	3a	
		n distribution test (attach the required schedule)	3b	7.040
4		fying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	7,848.
5		ndations that qualify under section 4940(e) for the reduced rate of tax on net investment income	_	^
		r 1% of Part I, line 27b (see instructions)		0
6	Adju	sted qualifying distributions. Subtract line 5 from line 4	6	7,848.
	Not	e. The amount on line 6 will be used in Part V, column (b), in subsequent years when c qualifies for the section 4940(e) reduction of tax in those years	calculating whether t	he foundation

Form 990-PF (2014) Page 9 Part XIII Undistributed Income (see instructions) (a) (b) (c) (d) Years prior to 2013 2013 2014 Corpus Distributable amount for 2014 from Part XI, 100. Undistributed income, if any, as of the end of 2014 a Enter amount for 2013 only ...... b Total for prior years 20 12 ,20 11 ,20 10 Excess distributions carryover, if any, to 2014 a From 2009 . . . . . . **b** From 2010 . . . . . . c From 2011 . . . . . . d From 2012 . . . . . . e From 2013 . . . . . . Qualifying distributions for 2014 from Part XII, 7,848. line 4 ▶ \$ \_\_\_\_\_ a Applied to 2013, but not more than line 2a . . . b Applied to undistributed income of prior years (Election required - see instructions) . . . . . Treated as distributions out of corpus (Election required - see instructions) . . . . . . . . . . . . 100. d Applied to 2014 distributable amount ..... 7,748. e Remaining amount distributed out of corpus . . . Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a)) Enter the net total of each column as indicated below: 7,748. 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 . . Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount - see instructions . . . . . . . . . Undistributed income for 2014 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015 . . . . . . . . . . . . . . . . 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) . . . . . . . . . . . . Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . . . Excess distributions carryover to 2015. 7,748. 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 . . . 7,748. e Excess from 2014 . . .

Рa	rt XIV Private Ope	erating Foundations	(see instructions ar	nd Part VII-A, questi	on 9)	NOT APPLICABLE
1 a	If the foundation has	received a ruling or d	etermination letter that	it is a private opera	ating	<del></del>
	foundation, and the ruling	g is effective for 2014, e	nter the date of the ruling		▶	
ь	Check box to indicate v				section 4942(j	)(3) or 4942(J)(5)
2.	Enter the locate of the or	Tax year		Prior 3 years		(a) Tatal
2 d	Enter the lesser of the ad- justed net income from Part	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total
	I or the minimum investment					
	return from Part X for each year listed					
b	85% of line 2a					
	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					
е	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		,			!
а	"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-	1				:
	enter 2/3 of minimum invest- ment return shown in Part X,					
	line 6 for each year listed				····	
С	"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)(m)				<del></del>	
	<li>(3) Largest amount of sup- port from an exempt</li>					4
	organization				<del> </del>	<del> </del>
Da	(4) Gross investment income .  rt XV Supplement	ntary Information (	Complete this part	t only if the found	lation had \$5 000	or more in assets
<u> </u>		during the year -s				
	Information Regardin					
а	List any managers of before the close of any	the foundation who ly tax year (but only if the	have contributed more ney have contributed n	e than 2% of the tota nore than \$5,000) (S	ee section 507(d)(2))	ved by the foundation
	MICHAEL L.		400/	f the steel of a com-	anation (as as asset	hi larga narkini of the
D	List any managers of ownership of a partner					y large portion of the
	ominorality of a partitor			,		
	N/A		,			'
2	Information Regardin	g Contribution, Grant	, Gift, Loan, Scholarsh	nip, etc., Programs:		
	Č	<del>-</del>			itable organizations	and does not accept
						or organizations under
	other conditions, comp	plete items 2a, b, c, an	d d			
а	The name, address, a	ind telephone number	or e-mail address of t	the person to whom ap	plications should be ac	ddressed
b	The form in which app	lications should be su	bmitted and information	on and materials they	should include	
C	Any submission deadl	ines				
C	Any restrictions or li	imitations on awards	, such as by geogra	aphical areas, charita	able fields, kinds of	institutions, or other

Part XV Supplementary Information (continued)								
3	<b>Grants and Contributions Paid Durin</b>	ons Paid During the Year or Approved for Future Payment						
	Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount			
	Name and address (home or business)	or substantial contributor	recipient	Contribution				
а	Paid during the year							
				,				
	Total		<u> </u>	▶ 3a				
	Approved for future payment	<u> </u>	<del></del>					
	, ipproved for fatare payment							
-								
				1				
				i				
	Total			▶ 3b				

	A Analysis of Income-Produ amounts unless otherwise indicated	T	ated business income	Excluded b	y section 512, 513, or 514	(e)
-		(a) Business code	(b) Amount	(c)	(d)	Related or exempt function income
=	service revenue		-	2.000.000		(See instructions )
				·		
d						
е						
f		<u> </u>				
_	and contracts from government agencies	<u> </u>		ļ		
	ship dues and assessments	<u>-</u>		1.4		
	on savings and temporary cash investments		<del></del>	14	2.	
	ds and interest from securities			<del> </del>		
	al income or (loss) from real estate		<del>-</del>	-		
	-financed property					
	il income or (loss) from personal property			<del> </del>		
	vestment income	{		<del></del>		
	loss) from sales of assets other than inventory	1				·
•	ome or (loss) from special events			1		
	rofit or (loss) from sales of inventory					
	evenue a					
_						
е		<u></u>				
2 Subtota	Add columns (b), (d), and (e)		<u> </u>		2.	
	dd line 12, columns (b), (d), and (e)				13	2
	heet in line 13 instructions to verify calc					····
Part XVI	B Relationship of Activities	s to the Ad	complishment of Ex	empt Purp	oses	
	accomplishment of the foundation	on's exemp	t purposes (other than	by providing	g funds for such purpose	es) (See instructions )
			·		·	
			<u>-</u>			
			-			
			_			
				-		
			_	<del>-</del>		
					·	

# 4) THE BERN SCHWARTZ FAMILY FOUNDATION 47-1141878 Page Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations Part XVII

1		ie organization direct	•		_	•	_			Yes	No
	ın sec	tion 501(c) of the Co	ode (other than s	ection 501(c)(3) org	anızatıons)	or in section	n 527, relating	to political			l
	organ	ızations?							ł		1
а	Trans	fers from the reportin	ig foundation to a	a noncharitable exen	npt organiza	ation of					1
	(1) Ca	ash							1a(1)		Х
	(2) Ot	her assets							1a(2)		X
b	Other	transactions									
	(1) Sa	ales of assets to a no	ncharitable exem	pt organization		<i></i>			16(1)		Х
	(2) Pu	irchases of assets fro	om a noncharitat	le exempt organization	on			[	1b(2)		Х
		ental of facilities, equi									Х
		eimbursement arrange									Х
		ans or loan guarantee									Х
	(6) Pe	erformance of service	s or membershi	or fundraising solici	tations				1b(6)		Х
С	Sharır	ng of facilities, equipm	nent, mailing lists	s, other assets, or pa	id employee	es			1c		Х
		answer to any of th								fair m	arket
		of the goods, other									
		in any transaction or									
(a) L	ne no	(b) Amount involved	(c) Name of no	ncharitable exempt organi	zation	(d) Description	of transfers, transa	ctions, and shan	па агга	ngeme	nts
- 1		N/A		· · · · · · · · · · · · · · · · · · ·		N/A	<u>.</u>	· · · · · ·			
	1		***				•				
				· · · · · · · · · · · · · · · · · · ·			• • •	<del></del>			
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	· · · · · · · · · · · · · · · · · · ·	<del></del>						•——			
		·····								-,	
22	Is the	foundation directly	or indirectly offil	ated with or relate							
La		bed in section 501(c)							٦ <sub>٧</sub> -	s X	1
h		s," complete the follow		ier than section 50 f(	(0)(0)) 01 111	Section 327	·	∟		:S [_^	] 140
	11 163	(a) Name of organization		(b) Type of orga	anization		(c) Descrip	tion of relationsh	ain.		
		(-) rame or or games		(2) .)po o. o.go		<del> </del>	(6) Descrip	Tion of relations	пp		
					'-						
								<del></del>			
		<u></u>	-	—	<del></del>		<del></del>				
	Unde	er penalities of perjury, I decla	are that I have examine	d this return, including acco	mpanying sched	lules and stateme	nts, and to the best	of my knowledge	and b	ellef. it	is true
	corre	ect, and complete Declaration of	preparer other than tax	payer) is based on all informati	ion of which prep	oarer has any knov	rledge			,	
Sigr	ו	In 180		14/14/20	15	Prosid	244	May the IRS			
Her	e   🖳	nature of officer or trustee	<del>~</del> \/	Date		7 7 5 7 7		with the pre		` _	below
	5.9	,	/	Juic	110			(see instructions	/' LA	Yes	No
		Print/Type preparer's nar	me	Preparer's signature		Dat	e		ΠN		
Paid	l	JEFFREY D HASH			CKEII	1	Ci			1577	0
Pre	oarer			JEFFREY D HA	חתים אכי	J. 04	1/13/2015 se			4577	<u> </u>
	Only		UNDATION SO			<del></del> -	Firm's Elf	v ▶51039	034/		
JJC	Unity	1	E HOLLOW LN			11040		000000	1754	1	
		LA.	KE SUCCESS,	NY		11042	Phone no	800839		DE	

### Schedule B

(Form 990, 990-EZ, or 990-PF) Department of the Treasur

### **Schedule of Contributors**

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

2014

OMB No 1545-0047

Department of the Treasury
Internal Revenue Service

Attach to Form 990, Porm 990-EZ, or Porm 990-EZ, or Porm 990-EZ, or 990-PF) and its instructions is at www irs gov/form990

Name of the organization

THE BERN SCHWARTZ FAMILY FOUNDATION

Employer identification number

		47-1141878
Organization type (check on	ie)	
Filers of:	Section:	
Form 990 or 990-EZ	501(c)( ) (enter number) organization	
	4947(a)(1) nonexempt charitable trust not treated as a private f	oundation
	527 political organization	
Form 990-PF	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a private found	lation
	501(c)(3) taxable private foundation	
	s covered by the <b>General Rule</b> or a <b>Special Rule.</b> (7), (8), or (10) organization can check boxes for both the General Rule and a	a Special Rule See
General Rule		
	on filing Form 990, 990-EZ, or 990-PF that received, during the year, contri y or property) from any one contributor. Complete Parts I and II. See instruc- contributions	
Special Rules		
regulations under 13, 16a, or 16b, a	on described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 99 and that received from any one contributor, during the year, total contributor of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1	0 or 990-EZ), Part II, line
contributor, during	on described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that g the year, total contributions of more than \$1,000 exclusively for religious, the thing process, or the prevention of cruelty to children or animals. Complete	charitable, scientific,
contributor, during contributions total during the year fo General Rule app	on described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that g the year, contributions <i>exclusively</i> for religious, charitable, etc., purposes, led more than \$1,000. If this box is checked, enter here the total contribution an <i>exclusively</i> religious, charitable, etc., purpose. Do not complete any of other to this organization because it received <i>nonexclusively</i> religious, charital r more during the year.	but no such ons that were received the parts unless the ble, etc, contributions
<del>_</del>	at is not covered by the General Rule and/or the Special Rules does not file	

Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Employer identification number 47-1141878

Part I	Contributors (see instructions). Use duplicate copies of Pa	art I if additional space is nee	ded
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1-	SCHWARTZ, MICHAEL L.  1111 BAYHILL DRIVE, SUITE 450  SAN BRUNO, CA 94066	\$10,000.	Person  Payroll  Noncash  (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) _ Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)

Employer identification number

47-1141878

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) (d) FMV (or estimate) Date rece			
		\$			
(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 THE BERN SCHWARTZ FAMILY FOUNDATION

Employer identification number

47-1141878	4	7-	1	1	4	1	8	78	3	
------------	---	----	---	---	---	---	---	----	---	--

	that total more than \$1,000 for the y following line entry. For organizations contributions of \$1,000 or less for the Use duplicate copies of Part III if additi	completing Part III, e year (Enter this in	enter the total of efformation once Se	exclusively religious, charitable, etc ,		
(a) No. from	(b) Purpose of gift	(c) Use		(d) Description of how gift is held		
Part I						
		(e) Transfe	er of gift			
	Transferee's name, address, an	nd ZIP + 4	Relatio	nship 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) Transferee's name, address, and ZIP + 4			nship 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		Relatio	nship of transferor to transferee		
(a) No. from Part I	(b) Purpose of gift	(c) Use	of gift	(d) Description of how gift is held		
	Transferee's name, address, at	(e) Transf	-	nship of transferor to transferee		

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10)

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ATTACHMENT

# - OTHER EXPENSES PART I FORM 990PE,

ADMINISTRATIVE FEES
ADMINISTRATIVE SET-UP FEE
DELAWARE INCORPORATION FEES
IRS APPLICATION FEES DESCRIPTION

EXPENSES

EXPENSES

PER BOOKS

1,998.

4,500.

850.

7,848.

TOTALS

PURPOSES 1,998. 4,500. 500. 850.

CHARITABLE

7,848.

NAME AND ADDRESS

SCHWARTZ, MICHAEL L. 1111 BAYHILL DRIVE, SUITE 450 SAN BRUNO, CA 94066

ATTACHMENT 2

47-1141878

# FORM 990PE, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

TITLE AND AVERAGE HOURS PER	WEEK DEVOTED TO POSITION
	NAME AND ADDRESS
	AND
	NAME

FRED W CONCKLIN
FOUNDATION SOURCE 501 SILVERSIDE RD
1.00
123
WILMINGTON, DE 19809-1377

TILDA R ORR
FOUNDATION SOURCE 501 SILVERSIDE RD 1.00
123
WILMINGTON, DE 19809-1377

ERIC A SCHWARTZ
FOUNDATION SOURCE 501 SILVERSIDE RD
1.00
123
WILMINGTON, DE 19809-1377

CHAEL L SCHWARTZ

MICHAEL L SCHWARTZ FOUNDATION SOURCE 501 SILVERSIDE RD

PRES / DIR 1.00

WILMINGTON, DE 19809-1377

ATTACHMENT 3

47-1141878