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Form **990-PF**

Return of Private Foundation

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

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

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

OMB No 1545-0052

Department of the Treasury Internal Revenue Service For calendar year 2014 or tax year beginning 2015 JUL 1, 2014 , and ending JUN 30, Name of foundation A Employer identification number CHARLES L. WEISBERG FAMILY FOUNDATION 61-1190609 Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number 295 N HUBBARDS LANE, SUITE 102 502-459-1921 City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here LOUISVILLE, KY 40207 G Check all that apply: Initial return Initial return of a former public charity D 1. Foreign organizations, check here Final return Amended return 2 Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here J Accounting method: X Cash I Fair market value of all assets at end of year Accrual F If the foundation is in a 60-month termination (from Part II, col (c), line 16) Other (specify) under section 507(b)(1)(B), check here 1,088,520. (Part I, column (d) must be on cash basis) ▶\$ Part I Analysis of Revenue and Expenses (d) Disbursements (b) Net investment (c) Adjusted net (a) Revenue and (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) for charitable purposes (cash basis only) expenses per books income income 9,890 N/A Contributions, gifts, grants, etc., received MAY if the foundation is not required to attach Sch. B. Interest on savings and temporary cash investments 24,291 23,705 STATEMENT Dividends and interest from securities 5a Gross rents b Net rental income or (loss) 109,166. 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 390,323. 109,166. Capital gain net income (from Part IV, line 2) RECEIVEL Net short-term capital gain Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) CCL11 Other income 143,347 132,871 12 Total, Add lines 1 through 11 0. Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits Operating and Administrative Expenses 16a Legal fees **b** Accounting fees c Other professional fees 53 0. 53. 17 Interest STMT 2 148. 148. 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 1,739 1,566 STMT 3 138. 23 Other expenses 24 Total operating and administrative 1,767 <u>1,940.</u> expenses. Add lines 13 through 23 138. 75,564 75,564. 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 77,504 1,767 75,702. Add lines 24 and 25 27 Subtract line 26 from line 12: 65,843 a Excess of revenue over expenses and disbursements 131,104 b Net investment income (if negative, enter -0-) N/A C Adjusted net income (if negative, enter -0-)

LHA For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2014) CHARLES L. WEISBERG FAMILY FOUNDA					-1190609 Page 2	
Part, II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only				eginning of year		of year
<u> </u>	UI 4	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing		43,595.	50,612.	
	2	Savings and temporary cash investments		29,640.	41,539.	42,539.
	3	Accounts receivable ►				
	1	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		-	 	
	ľ	disqualified persons				
	7	Other notes and toans receivable				
	′					
	1	Less: allowance for doubtful accounts				
Assets	١.	Inventories for sale or use	-			
ASS	9	Prepaid expenses and deferred charges				
_	1	Investments - U.S. and state government obligations STMT 4		233.	201.	
	b	Investments - corporate stock STMT 5		574,172.	553,481.	818,868.
	C	Investments - corporate bonds				
	11	Investments - land, buildings, and equipment basis				
		Less accumulated depreciation				
	12	Investments - mortgage loans				
	13	Investments - other STMT 6		97,741.	165,391.	176,403.
	14	Land, buildings, and equipment: basis				
		Less accumulated depreciation				
	15	Other assets (describe)		·	
		Total assets (to be completed by all filers - see the				
		instructions. Also, see page 1, item I)		745,381.	811,224.	1,088,520.
	17	Accounts payable and accrued expenses		72373021	<u> </u>	1,000,520.
	1	Grants payable				
~	19	Deferred revenue				
Liabilities	l					
Ē	1	Loans from officers, directors, trustees, and other disqualified persons				
Ë	Ĺ	Mortgages and other notes payable	,			
	22	Other liabilities (describe >	_'			
		T . 11: 13:0: /-441 47:1			0	
_	23	Total liabilities (add lines 17 through 22)		0.	0.	
		Foundations that follow SFAS 117, check here				
Ø		and complete lines 24 through 26 and lines 30 and 31.				
ည	24	Unrestricted				
a	25	Temporarily restricted			···	
ä	26	Permanently restricted				
Ĕ		Foundations that do not follow SFAS 117, check here	!			
느		and complete lines 27 through 31.				
S	27	Capital stock, trust principal, or current funds		<1,036.>	<1,036.	>
set	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
Ä	29	Retained earnings, accumulated income, endowment, or other funds		746,417.	812,260.	
Net Assets or Fund Balances	30	Total net assets or fund balances		745,381.	811,224.	
_	İ					
	31	Total liabilities and net assets/fund balances		745,381.	811,224.	
P	art		Balance			
_						
		net assets or fund balances at beginning of year - Part II, column (a), I	ine 30			745 224
	•	t agree with end-of-year figure reported on prior year's return)			1	745,381.
		amount from Part I, line 27a			2	65,843.
		rincreases not included in line 2 (itemize)	· · · · · · · · · · · · · · · · · · ·	· · · · · ·	3	0.
		ines 1, 2, and 3			4	811,224.
		eases not included in line 2 (itemize)			5	0.
<u>6</u>	ı otal	net assets or fund balances at end of year (line 4 minus line 5) - Part II	i, column (b	, line 30		811,224.

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.

	n 990-PF (2014) CHARLES L. WEISBERG FAMILY FOUNDATION 61-119 art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see	0609 instr	uctio	Page 4
1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1.			
	Date of ruling or determination letter: (attach copy of letter if necessary-see instructions)			
ь	Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 1%		2 6	522.
	of Part I, line 27b		2,	
c	c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
				0.
3	Add lines 1 and 2	-	2 6	22.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2,0	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		2 6	22.
6	Credits/Payments:		2,0	24.
_	2014 estimated tax payments and 2013 overpayment credited to 2014 6a 892.			
	Exempt foreign organizations - tax withheld at source			
	I Backup withholding erroneously withheld 6c 2,800.			
			2 6	0.0
			3,0	92.
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8			
			1 0	70
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 10		1,0	70.
	Enter the amount of line 10 to be: Credited to 2015 estimated tax ► 1,070 . Refunded ► 11 art VII-A Statements Regarding Activities			<u>0.</u>
		₁	Voc	l Na
ıa	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?	<u> </u>	Yes	+
		1a	ļ. —	X
D	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	<u>1b</u>	ļ	X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or			
	distributed by the foundation in connection with the activities			
	Did the foundation file Form 1120-POL for this year?	1c		X
a	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			
	(1) On the foundation. ► \$ (2) On foundation managers. ► \$ 0.			'
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation	1		
_	managers. ► \$ 0.	İ		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		<u>X</u>
_	If "Yes," attach a detailed description of the activities			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or			
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
	If "Yes," has it filed a tax return on Form 990-T for this year? N/A	4b		
ð	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
_	If "Yes," attach the statement required by General Instruction T.	1		
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	<u>X</u>	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)			
	KY]
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)			
	of each state as required by General Instruction G? If "No," attach explanation	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar			
	year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		х
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X
		rm 990	-PF (

	1990-PF (2014) CHARLES L. WEISBERG FAMILY FOUNDATION 61-119	<u>0609</u>		Page 5
	art VII-A Statements Regarding Activities (continued)			,
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		x
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
	If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► N/A			
14	The books are in care of ► RON WEISBERG Telephone no. ► 502-4	59-1	921	
	Located at ▶ 3411 BARDSTOWN ROAD, LOUISVILLE, KY ZIP+4 ▶4			
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	N	/A	
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16	i	X
	See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the			
	foreign country >			
Pa	art 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?	1 1	ĺ	'
	(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?	1 1		
	(5) Transfer any income or assets to a disqualified person (or make any of either available	1 1	İ	
	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.)	1 1	1	
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here			
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected		}	
	before the first day of the tax year beginning in 2014?	1c		<u>X</u>
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)):			
а	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 \(\bigs_{			
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	1 1	i	
	statement - see instructions.) N/A	2b		
C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
2.	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
04	during the year?	1 1		
.	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after			
U	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		1	
	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.)	,		
42	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	3b		X
	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	4a		
-	had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4h		x

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)	Form 990-PF (2014) CHARLES L. WEISBERG FAM	ILY FOUNDATIO	<u>N</u>	61-11906	09 Page 6
(1) Carry on propagatist, or otherwise altempt to influence legislation (section 4945(c))? (2) Influence the outcome of any sponching public election (4955); or to carry on, directly or indirectly, any voter registration drive? (3) Provide a grant to an organization of the than a churizable, it.e., organization described in section 495(c)(4)(A)(A) (see instructions) (5) Provide for any purpose of them religious, charitable, scientific, literary, or oducational purposes, or for the prevention of cruelly to children or animals? (6) If any other or six "Yes" to Sq.(1) did any of the transactions fail to quality under the exceptions described in Regulations section 53.4945 or an acurrent notice regarding desaster assistance factors? (7) Organizations relying on acurrent notice regarding desaster assistance factors are structions?? (8) If "Yes" (3) did any of the transactions fail to quality under the exceptions described in Regulations section 53.4945 or an acurrent notice regarding desaster assistance factors? (8) If any array responsibility for the grant? (9) Organizations relying on acurrent notice regarding desaster assistance factors? (9) If "Yes" (3) did not the statement required by Regulations section 53.4945-5(g). (9) But the toundation, during the year, receive any funds, directly or indirectly, to pay pertinums on a personal beneficit contract? (1) "Yes" (3) Robert Contract? (1) "Yes" (3) Robert Contract? (1) "Yes" (3) Robert Contract? (2) The Signal Transaction? (3) If "Yes" (4) Robert Contract? (4) "Yes" (5) Robert Contract? (5) Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Pald Employees, and Contractors (6) A Transaction? (6) A Transaction of the Robert Contract? (7) Table Employees, and Contractors (8) Name and address or each employee part more than \$50,000 D. Toundation companies and contractions of the Robert Part of the Regulation of the Regulation of the Regulation of the Regulation of the Regulation of the Regulation of the Regu		Form 4720 May Be	Required (contin	nued)	·
(2) Influence the outcome of any sponchic public decidor (sees section 4555); or to carry on, directly, or indirectly, any voter registration drives? (3) Provide a grant or an individual for taxel, study, or other similar purposes? (4) Provide a grant or an organization other than a chanitable, etc., organization described in section 4945(O(4)AP (see instructions) (5) Provide for any purpose other than reliquous, chanitable, seemands, iterary, or educational purposes, or for the prevention of usulty to children or animals? 5) If any answer is "Yes" to \$81(*)(5), did any of the transactions fail to qualify under the exceptions described in Regulations section \$34(*)(6). 6) If any answer is "Yes" to \$81(*)(5), did any of the transactions fail to qualify under the exceptions described in Regulations section \$34(*) one such careful regulations (see instructions)? Organizations relying on a current notice regarding desister assistance cleek here 1 If the answers is "Yes" to \$81, the form \$870 or the search of \$81, 40 cs. the formation of \$81,40 cs. the formation of search of \$81,40 cs. the formation of search of \$81,40 cs. the formation of search of \$81,40 cs. the formation of the search of \$81,40 cs. the formation of the search of \$81,40 cs. the formation of the search of \$81,40 cs. the formation of the search of \$81,40 cs. the formation of the search of \$81,40 cs. the formation of the search of \$81,40 cs. the formation of the search of \$81,40 cs. the formation of the search of \$81,40 cs. the formation of the search of \$81,40 cs. the searc					i
any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an individual for travel, study, or other similar purposes, or for the prevention of criefly to children or animals? (5) Provide to any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of criefly to children or animals? (6) If any arraws it "Yes" to Si(1), did any of the transactions fall to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? (7) Criganization relying on a current notice regarding disaster assistance check here (8) If any arraws it "Yes" to question 53.614, isos the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? (8) Yes, "attach the statement required by Regulations assistance (see instructions)? (9) A statistic form the grant? (1) Yes, "attach the statement required by Regulations assistance (see instructions)? (1) Yes, "attach the statement required by Regulations assistance (see instructions)? (1) Yes, "attach the statement required by Regulations assistance (see instructions)? (1) Yes, "attach the statement required by Regulations assistance (see instructions)? (2) No (3) If Yes, "attach the statement required by Regulations assistance (see instructions)? (4) Yes (3) No (5) No (6) X (7) Yes (3) No (6) X (7) No (7) Yes (3) No (8) If Yes, "attach the statement required assistance (see instructions)? (8) If Yes, "attach the statement required by Regulations assistance (see instructions)? (9) Yes (3) No (1) Yes (3) No (1) Yes (3) No (1) Yes (3) No (1) Yes (3) No (1) Yes (3) No (1) Yes (3) No (1) Yes (3) No (1) Yes (3) No (1) Yes (3) No (1) Yes (3) No (2) No (3) No (4) Yes (4) No (4) Yes (4) No (5) No (6) Ves (7) No (6) Ves (7) No (· · · · · · · · · · · · · · · · · · ·			es LX No	
(4) Provide a grant to an organization offer the han a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) (5) Provide for any purpose other than religious, charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) (5) Provide for any purpose other than religious, charitable, scenific, literary, or educational purposes, or for the prevention of cruelly to chiefer or ammals? 1 Ves	• • • • • • • • • • • • • • • • • • • •	; or to carry on, directly or indi			1 1
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(4)(4)(2) (cea instructions) (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of curely to children or animals? It is prevention of curely to children or animals? No bit any arraws in "Yes" to \$1(1)(4), of any of the framesations fall to qualify under the exceptions described in Regulations section 53,4945 or in a current notice regarding disaster assistance check here I the enswer is "Yes" to question 54(4), does the foundation charm exemption from the lax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53,4945-5(d). Sa Did the foundation, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract? If "Yes," to 6b, file Form 8870 7a At any time during the tax year, was the foundation aparty to a prohibited tax shelter transaction? N/A 1"Yes To 6b, file Form 8870 7a At any time during the tax year, was the foundation aparty to a prohibited tax shelter transaction? N/A 1"Yes To 6b, file Form 8870 7a At any time during the tax year, was the foundation aparty to a prohibited tax shelter transaction? N/A 7b International Differences, differences any proceeds or have any net moment attributable to the transaction? N/A 7b International Differences, differences any proceeds or have any net moment attributable to the transaction? List all officers, directors, trustees, foundation managers and their compensation. (a) Name and address N/A 7b International Differences, directors, trustees, foundation managers and their compensation. (b) Title, and average for the file of the part of the part of the part of the part of the part of the part of the part of the part of the part of the part of the part of the part of the part of the part of the part of the part of the part of the part of the part of	any voter registration drive?				
4945(f)(4)(A)(exe matructions) (5) Provide to any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? b I any arrows is Yes' to us (1)-(3), did say of the Transactions fall to qualify under the exceptions described in Regulations section S3-4945 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here of It the answer is Yes' to quisation assist, divide the foundation call, does the foundation call, does the foundation call, does the foundation call the statement required by Regulations section S3-4945-5(d). 8a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? 8b Did the foundation, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract? 9 Yes IX No 1 If Yes's 100 b, life Form 8870 Yes IX No 1 If Yes's 1 of the foundation aparty to a prohibited tax shelter transaction? 1 If Yes's 1 of the foundation receive any funds, directly or indirectly, to pay premiums on a personal benefit contract or yes any new lancome attributable to the transaction? 1 If Yes's 1 of the foundation receive any promotes or they any net income attributable to the transaction? 1 If Yes's 1 of the foundation receive any promotes or they any net income attributable to the transaction? 1 If Yes's 1 of the foundation receive any promotes or they any net income attributable to the transaction? 1 If Yes's 1 of the foundation receive any promotes or they any network and the foundation receives any promotes or the foundation managers and their compensation. 1 Information About Officers, Trustees, Foundation Managers, Highly Paid Employees, and Contractors 1 I I I I I I I I I I I I I I I I I I	· · ·		Y	es X No	
(s) Provide for any purpose other than religious, chartable, scientific, literary, or educational purposes, or for the prevention of curely to chidren or animals? 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 \$3.4945 or in a current notice regarding disaster assistance (see instructions)? Originations relying on a current notice regarding disaster assistance (see instructions)? Originations relying on a current notice regarding disaster assistance (see instructions)? Originations relying on a current notice regarding disaster assistance (see instructions)? Originations relying on a current notice regarding disaster assistance check here or If the answer is "Yes" to question \$4,0 does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes" catach the statement required by Pegulations section 53.4945-5(g). 6a Did the foundation, during the year, near premiums, directly or indirectly, to pay premiums on a personal benefit contract? Origination during the lax year, receive any function, or a personal benefit contract? If "Yes" to bb, the form #850 the foundation aparty to a prohibited as sheller transaction? Origination during the lax year, was the foundation aparty to a prohibited as sheller transaction? Origination of the lax year, was the foundation aparty to a prohibited as sheller transaction? Part VIIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors Origination of the lax year, was the foundation aparty to a prohibited to the transaction? Origination of the paid of	(4) Provide a grant to an organization other than a charitable, etc., organizat	ion described in section			
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3550 GLENVIEW	(a) Name and address	hours per week devoted to position	(If not paid,	employee benefit plans and deferred compensation	account, other allowances
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	Total number of other employees paid over \$50,000			Form 9	<u>_</u>

Form 990-PF (2014) CHARLES L. WEISBERG FAMILY FOUNDATION 6	51-1190	609 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)		
3 Five highest-paid independent contractors for professional services. If none, enter "NONE."		
(a) Name and address of each person paid more than \$50,000 (b) Type of service	e	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities	>	0
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 N/A		"
2		
3		
<u> </u>		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount
1 N/A	_	
2		
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3	•	0.
Total, Add lines 1 dillough o		990-PF (2014)

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_	m 990-PF (2014) CHARLES L. WEISBERG FAMILY FOUNDATION	<u> 9T</u>	-1190609 Page 8
L	Minimum Investment Return (All domestic foundations must complete this part. Foreign fou	ndations,	, see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	925,194.
b	Average of monthly cash balances	1b	925,194. 190,741.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,115,935.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0 .]	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,115,935.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	16,739.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,099,196.
6	Minimum investment return. Enter 5% of line 5	6	54,960.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are	nd certain	
	foreign organizations check here and do not complete this part.)	,	
1	Minimum investment return from Part X, line 6	1	54,960.
2a	Tax on investment income for 2014 from Part VI, line 5 2a 2,622.		
b	Income tax for 2014. (This does not include the tax from Part VI.)	!	
C	Add lines 2a and 2b	2c	2,622.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	52,338.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	52,338.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	52,338.
Р	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	75,702.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
а	, , , , , , , , , , , , , , , , , , ,	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	75,702.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	<u> </u>
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	75,702.
	Note The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of	jualifies for	r 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				52,338.
2 Undistributed income, if any, as of the end of 2014				32,330.
a Enter amount for 2013 only			0.	
b Total for prior years:				
,		0.		
3 Excess distributions carryover, if any, to 2014:				· · · · · · · · · · · · · · · · · · ·
a From 2009 61,494.				
b From 2010 83,310.				
c From 2011 48,166.				
d From 2012 150,162.				
e From 2013 42,191.				
f Total of lines 3a through e	385,323.			
4 Qualifying distributions for 2014 from				
Part XII, line 4: \triangleright \$ 75,702.				
a Applied to 2013, but not more than line 2a			0.	
b Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			
d Applied to 2014 distributable amount				52,338.
e Remaining amount distributed out of corpus	23,364.			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	408,687.			
b Prior years' undistributed income. Subtract		1		
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2013. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2014. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2015				0.
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)	0.			
8 Excess distributions carryover from 2009				
not applied on line 5 or line 7	61,494.			
9 Excess distributions carryover to 2015				
Subtract lines 7 and 8 from line 6a	347,193.			
O Analysis of line 9:				
a Excess from 2010 83,310.				
b Excess from 2011 48,166.				
c Excess from 2012 150, 162.				
d Excess from 2013 42,191.				
e Excess from 2014 23,364.			l	5 000 DE (0041)

Part XIV Private Operating F	oundations (see in:			N/A	190609 Page IC		
1 a If the foundation has received a ruling of			· · · · · · · · · · · · · · · · · · ·	N/A	·		
foundation, and the ruling is effective fo		· · · · · · · ·					
b Check box to indicate whether the found	•	•	un section	4942(j)(3) or	1942(j)(5)		
2 a Enter the lesser of the adjusted net	Tax year	ig touridation described	Prior 3 years	1 1312())(0) 01	1042())(0)		
income from Part I or the minimum	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total		
investment return from Part X for	(-)	(0) ====	(4)	1-7	(0) (0)		
each year listed				•			
b 85% of line 2a			-		+		
c Qualifying distributions from Part XII,							
line 4 for each year listed							
d Amounts included in line 2c not							
used directly for active conduct of					İ		
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			1		 		
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					<u> </u>		
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				1			
(4) Gross investment income Part XV Supplementary Info	rmation (Comple	te this part only	if the foundation	had \$5 000 or m	ore in assets		
at any time during t	• •		ii tiio iodiidatioi	· παα φο,σσο σι π	ioro iir assets		
1 Information Regarding Foundatio							
a List any managers of the foundation who	-	han 2% of the total con	tributions received by the	foundation before the cle	ose of any tax		
year (but only if they have contributed in				Tourisday Soloro and or	oo o an an		
SEE STATEMENT 7							
b List any managers of the foundation who	o own 10% or more of the	stock of a corporation	(or an equally large porti	on of the ownership of a	partnership or		
other entity) of which the foundation has	s a 10% or greater interes	t.	, , , , , ,				
NONE							
2 Information Regarding Contributi	on, Grant, Gift, Loan,	Scholarship, etc., P	rograms:				
Check here ► X if the foundation o							
the foundation makes gifts, grants, etc.	(see instructions) to indiv	iduals or organizations	under other conditions, c	omplete items 2a, b, c, ar	ıd d.		
a The name, address, and telephone numl	oer or e-mail address of th	ne person to whom app	lications should be addre	ssed:			
b The form in which applications should b	e submitted and informat	ion and materials they s	hould include:				
e Any submission deadlines:							
c Any submission deadlines;							
d Any restrictions or limitations on awards	s, such as by geographica	l areas, charitable fields	, kinds of institutions, or	other factors:			
				<u> </u>			

· art xx - cappionionian				
3 Grants and Contributions Paid During the	Year or Approved for Future	Payment		
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
	L			
SEE ATTACHED LIST	NONE		GENERAL FUND	75,564.
		-		75,564.
		-		~
Total			▶ 3a	75,564
b Approved for future payment				
NONE				
NONE				
Total			▶ 3b	0.
10141			₽ 30 l	()

423611 11-24-14 Form 990-PF (2014) Part XVI-A

Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income		ded by section 512, 513, or 514	(e)
g g a	(a)	(b)	(C) Exclu-	(d)	Related or exempt
1 Dragram con usa rayanyar	(a) Business code	Amount	sion	Amount	function income
1 Program service revenue:	Code		code		
a		····			· · · · · · · · · · · · · · · · · · ·
b			ļ		
C					
d			1 :		
e					
f					
g Fees and contracts from government agencies	h		 		
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments					<u>, </u>
4 Dividends and interest from securities			14	24,291.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal					
				i	
property			0.4		
7 Other investment income			01		
8 Gain or (loss) from sales of assets other					
than inventory			18	109,166.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
	-				
****** **** *** **** **** **** **** ****					
C					
d					
e					14. 114
12 Subtotal. Add columns (b), (d), and (e)		0.		133,457.	
13 Total. Add line 12, columns (b), (d), and (e)				13	133,457.
(See worksheet in line 13 instructions to verify calculations.)					
Part XVI-B Relationship of Activities to	the Asse	mplichment of Ev	amni	t Burnaga	
Telationship of Activities to	tile Acco	inhiisiiiieiii oi Ex	emp	t ruiposes	
Line No. Explain below how each activity for which incom	e is reported ii	n column (e) of Part XVI-A	contrib	uted importantly to the accom-	plishment of
▼ the foundation's exempt purposes (other than by			00111110	and importantly to the accom-	Janoin of
	, _F				
					
		· · · · · · · · · · · · · · · · · · ·			
					
					
					
					
					
		,			
					
423621				_	
423621 11-24-14					Form 990-PF (2014)

-	- coopy (code) CHARLEG I WEIGHROOF BANTLY HOLDDAMION (1 1100	<i>-</i>	_					
_	m 990-PF (2014) CHARLES L. WEISBERG FAMILY FOUNDATION 61-119 Cart XVII Information Regarding Transfers To and Transactions and Relationships With Nonchar			ge 13				
	art XVII Information Regarding Transfers To and Transactions and Relationships With Nonchar Exempt Organizations	itabie	•					
		ι —	Yes	No				
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of	i	163	140				
	the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?							
а	Transfers from the reporting foundation to a noncharitable exempt organization of:							
	(1) Cash	1a(1)		X				
	(2) Other assets	1a(2)		Х				
b	Other transactions:							
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X				
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		Х				
	(3) Rental of facilities, equipment, or other assets	1b(3)		X				
	(4) Reimbursement arrangements	1b(4)		X_				
	(5) Loans or loan guarantees	1b(5)		X				
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X				
C	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		<u>X</u> _				
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, of	her ass	ets,					
	or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, sh	ow in						
	column (d) the value of the goods, other assets, or services received.							
(- 1 -	(h) Amount involved (a) Name of people stable average received (4) a			. 				

column	n (d) the value of the goods, (other assets, or services received.				
(a) Line no	(b) Amount involved	(c) Name of noncharitable	e exempt organization	(d) Description	of transfers, transaction	s, and sharing arrangements
		N/A				
						<u> </u>
-						
					·	
					····	
ın secti	on 501(c) of the Code (other complete the following sche		tion 527?			Yes X No
	(a) Name of orga	anization	(b) Type of organization		(c) Description of rela	tionship
_ .	N/A				· · · · · · · · · · · · · · · · · · ·	
		<u> </u>				
				· · · · · · · · · · · · · · · · · · ·		
Sign Here	der penalties of perjury, I declare to d belief, it is drug conect, and com ignature of officer or trustee	hat I have examined this return, includir plete Decistation of preparer (other tha	g accompanying schedules and in taxpayer) is based on all inform	statements, and to the ation of which preparer	best of my knowledge has any knowledge	May the IRS discuss this return with the preparer shown below (see instr)? X Yes No
	Print/Type preparer's na	me Pre pa rer's s		Date	Check If F	PTIN
Paid	BARRY J CHI	(Dan)	Clos	Date	self- employed	P00176953
Prepare Use Onl	ly	IS T. ROTH & CO			Firm's EIN ► 61	-0480236
	Firm's address ► 21	00 GARDINER LAN	E 207			
	LO	JISVILLE, KY 40	205		Phone no. (50	2)459-8100

CHARLES L. WEISBERG FAMILY FOUNDATION
Part IV | Capital Gains and Losses for Tax on Investment Income

	Capital Gaine and Loo	OCO TOT TEX OIL THIT COUNTERN THOUSAND				
(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.					(c) Date acquired (mo., day, yr.)	(d) Date sold (mo , day, yr.)
1a UBS #57416					 	
b UBS #16364						VARIOUS
						VARIOUS
		P P		09/30/14		
	#00088		P		VARIOUS	
	#00088	P	VARIOUS	VARIOUS		
f UBS	#00610 - 21	12 SHS SOUTHERN	CO	D	VARIOUS	VARIOUS
g CAP	ITAL GAINS I	DIVIDENDS				
h						
1						
<u> </u>				· · · ·	 	
					 	
_k					 	
					 	
<u>m</u>						
_n					 	
		-·			Ł	<u> </u>
(e)	Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h (e) r) Gain or (loss) plus (f) minus (g)	
a	163,161.		109,492.	· · · · · · · · · · · · · · · · · · ·		53,669.
b	61,076.		33,626.			27,450.
C	33,000.		18,590.			14,410.
d	11,772.		11,814.			<42.>
	103,108.		97,745.			5,363.
<u>e</u>	10,694.		9,890.			
<u>f</u>	7,512.		9,890.			804.
<u>g</u>	1,514.					7,512.
<u>h</u>						
<u>k</u>						
<u> </u>						·
m						
n						
0				· 		
	ete only for assets showing	gain in column (h) and owned by t	he foundation on 12/31/69	(I) Los	ses (from col. (h))	
		(j) Adjusted basis	(k) Excess of col. (i)	Gains (excess of	of col. (h) gain over	col. (k),
(i) F.I	M.V. as of 12/31/69	as of 12/31/69	over col. (j), if any	but n	ot less than "-0-")	
						53,669.
<u>a</u>						27,450.
<u>b</u>						
<u>c</u>				······································		14,410.
<u>d</u>						<u> </u>
<u>e</u>						5,363.
<u>f</u>						804.
<u>g</u>						7,512.
h						
1						
1						
k						
m						
n						-
0						
						
2 Capital o	gain net income or (net cap	ortal loss) { If gain, also enter If (loss), enter "-0-	in Part I, line 7			109,166.
			<u> </u>	+		107,100.
3 Net short	rt-term capital gain or (loss	s) as defined in sections 1222(5) and	d (6):			
if (lose)	also enter in Part I, line 8, c , enter "-0-" in Part I, line 8	ounn (c).	ř l		NT / 3	
11 (1055)	, onto o miaiti, mie o			<u> </u>	N/A	

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

Attach to Form 990, Form 990-EZ, or Form 990-PF.
 Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2014

Name of the organization

Employer identification number

CH	HARLES L. WEISBERG FAMILY FOUNDATION	61-1190609				
Organization type (check o						
Filers of:	Section:					
Form 990 or 990-EZ	501(c)() (enter number) organization					
	4947(a)(1) nonexempt charitable trust not treated as a private foundation					
	527 political organization					
Form 990-PF	X 501(c)(3) exempt private foundation					
	4947(a)(1) nonexempt charitable trust treated as a private foundation					
	501(c)(3) taxable private foundation					
	s covered by the General Rule or a Special Rule. (7), (8), or (10) organization can check boxes for both the General Rule and a Special Rul	e See instructions.				
General Rule						
	n filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling one contributor. Complete Parts I and II. See instructions for determining a contributor's	· · · · · · · · · · · · · · · · · · ·				
Special Rules						
sections 509(a)(1) any one contributo	n described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support to and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount line 1. Complete Parts I and II.	or 16b, and that received from				
year, total contribu	n described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from a tions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educa ruelty 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						
out it must answer "No" on	nat is not covered by the General Rule and/or the Special Rules does not file Schedule B Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Forthe filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)	•				

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2014)

Name of organization

Employer identification number

CHARLES L. WEISBERG FAMILY FOUNDATION

61-1190609

Part I	Contributors (see instructions) Use duplicate copies of Part I if	f additional space is needed	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ROBYN AND BEN SLEN 406 POLO DRIVE CLAYTON, MO 63105	\$\$.	Person Payroll Noncash X (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 Payroli Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$\$	Person Pe

Name of organization

Employer identification number

CHARLES L. WEISBERG FAMILY FOUNDATION

61-1190609

	Noncash Property (see instructions) Use duplicate copies of Part	<u> </u>	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_1	212 SHARES OF SOUTHERN CO. STOCK		
		\$\$.	11/02/14
(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. rom art I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. rom art I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
i		\$	

Name of orga •	nnization		Employer identification number		
CHARLE Part III	the year from any one contributor. Complete	ributions to organizations describe columns (a) through (e) and the follo	61-1190609 d in section 501(c)(7), (8), or (10) that total more than \$1,000 for powing line entry. For organizations		
	completing Part III, enter the total of exclusively religiou	s, charitable, etc., contributions of \$1,000 c	or less for the year (Enter this info once) \$		
(a) No.	Use duplicate copies of Part III if addition	al space is needed			
from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held		
		(e) Transfer of gi	ft		
-	Transferee's name, address, a	nd 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 git	ft		
-	Transferee's name, address, ar	nd 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 git			
	Transferee's name, address, ar		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 gif	t		
	Transferee's name, address, an	d ZIP + 4	Relationship of transferor to transferee		
-					

FORM 990-PF	DIVIDENDS	AND INTER	EST 1	FROM SECUR	ITIES ST	PATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND		(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUST NET INC	
INT & DIV-ALAN - C. SCHWAB	4,350.	1,86	6.	2,484.	2,484.		
INT & DIV-FRANK - UBS	12,301.		0.	12,301.	12,301.		
INT & DIV-MICHAEL - UBS	1,347.	45	4.	893.	893.		
INT & DIV-ROBYN - UBS	259.		0.	259.	259.		
INT & DIV-RON - UBS	13,546.	5,19	2.	8,354.	7,768.		
TO PART I, LINE 4	31,803.	7,51	2.	24,291.	23,705.		
=					···		
FORM 990-PF		TAX	ES		Si	PATEMENT	2
DESCRIPTION		(A) EXPENSES PER BOOKS		(B) INVEST- INCOME	(C) ADJUSTED NET INCOME	(D) CHARITAI PURPOSI	
FOREIGN TAXES		148.		148.			0.
TO FORM 990-PF, PG 1, LN 18		148.		148.			0.
FORM 990-PF		OTHER E	XPENS	SES	ST	PATEMENT	3
DESCRIPTION		(A) EXPENSES PER BOOKS		(B) INVEST- 'INCOME	(C) ADJUSTED NET INCOME	(D) CHARITAI PURPOSI	
BROKER FEES BANK CHARGES NON-DEDUCTIBLE EXPEN	- ISES	1,566. 138. 35.		1,566. 0. 0.		13	0. 38. 0.
TO FORM 990-PF, PG 1	L, LN 23	1,739.		1,566.		13	38.

FORM 990-PF U.S. AND STATE/C	CITY GOV	ERNMENT	OBLIGATIONS	STATEMENT	4
DESCRIPTION	U.S. GOV'T		BOOK VALUE	FAIR MARKET VALUE	C
U.S. GOV'T OBLIGATIONS	X		201.	9	98.
TOTAL U.S. GOVERNMENT OBLIGATIONS	201.	98.			
TOTAL STATE AND MUNICIPAL GOVERNMEN	T OBLIG	ATIONS			-
TOTAL TO FORM 990-PF, PART II, LINE	9	8.			
FORM 990-PF COR	PORATE	STOCK		STATEMENT	 5
DESCRIPTION			BOOK VALUE	FAIR MARKET VALUE	
CORPORATE STOCKS		-	553,481.	818,86	8.
TOTAL TO FORM 990-PF, PART II, LINE	553,481.	818,86	8.		
FORM 990-PF OTHE	R INVES	TMENTS		STATEMENT	
DESCRIPTION	VALU MET	ATION HOD	BOOK VALUE	FAIR MARKET VALUE	•
OTHER INVESTMENTS	CO	ST	165,391.	176,40	13.
TOTAL TO FORM 990-PF, PART II, LINE	13	=	165,391.	176,40	3.
FORM 990-PF PART X	V - LIN		200	STATEMENT	7

NAME OF MANAGER

FRANK WEISBERG RONALD WEISBERG ALAN WEISBERG