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Return of Private Foundation

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

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2014

Open to Public Inspection

Form 990-PF

Department of the Treasury Internal Revenue Service

For calendar year 2014 or tax year beginning DEC 1, 2014, and ending NOV 30, 2015

Name of foundation: **THE TRUMA FOUNDATION**

Number and street (or P O box number if mail is not delivered to street address): **POB 407**

City or town, state or province, country, and ZIP or foreign postal code: **BROOKLYN, NY 11219**

A Employer identification number: **13-4099736**

B Telephone number: **(718) 438-2804**

C If exemption application is pending, check here

D 1 Foreign organizations, check here
 2. Foreign organizations meeting the 85% test, check here and attach computation

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

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

G Check all that apply: Initial return Initial return of a former public charity Amended return Address change Name change

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16): **\$ 12,768,113.** (Part I, column (d) must be on cash basis)

J Accounting method: Cash Accrual Other (specify)

| Part I Analysis of Revenue and Expenses | | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|---|--|------------------------------------|---------------------------|-------------------------|---|
| 1 | Contributions, gifts, grants, etc., received | 728,999. | | | |
| 2 | Check <input type="checkbox"/> if the foundation is not required to attach Sch B | | | | |
| 3 | Interest on savings and temporary cash investments | 5,638. | 5,638. | 5,638. | STATEMENT 1 |
| 4 | Dividends and interest from securities | 220,020. | 220,020. | 220,020. | STATEMENT 2 |
| 5a | Gross rents | 302,222. | 302,222. | 302,222. | STATEMENT 3 |
| b | Net rental income or (loss) -71,135. | | | | STATEMENT 4 |
| 6a | Net gain or (loss) from sale of assets not on line 10 | 596,032. | | | |
| b | Gross sales price for all assets on line 6a 1,776,000. | | | | |
| 7 | Capital gain net income (from Part IV, line 2) | | 596,032. | | |
| 8 | Net short-term capital gain | | | 150,741. | |
| 9 | Income modifications | | | | |
| 10a | Gross sales less returns and allowances | | | | |
| b | Less Cost of goods sold | | | | |
| c | Gross profit or (loss) | | | | |
| 11 | Other income | | | | |
| 12 | Total. Add lines 1 through 11 | 1,852,911. | 1,123,912. | 678,621. | |
| 13 | Compensation of officers, directors, trustees, etc | 0. | 0. | 0. | 0. |
| 14 | Other employee salaries and wages | 30,000. | 15,000. | 0. | 15,000. |
| 15 | Pension plans, employee benefits | 585. | 0. | 0. | 585. |
| 16a | Legal fees | | | | |
| b | Accounting fees STMT 5 | 13,500. | 10,000. | 0. | 3,500. |
| c | Other professional fees STMT 6 | 2,792. | 2,792. | 0. | 0. |
| 17 | Interest | | | | |
| 18 | Taxes STMT 7 | 12,688. | 1,435. | 0. | 1,434. |
| 19 | Depreciation and depletion | | | | |
| 20 | Occupancy JAN 17 2017 | | | | |
| 21 | Travel, conferences, and meetings | | | | |
| 22 | Printing and publications | | | | |
| 23 | Other expenses STMT 8 | 391,170. | 375,853. | 373,357. | 15,317. |
| 24 | Total operating and administrative expenses. Add lines 13 through 23 | 450,735. | 405,080. | 373,357. | 35,836. |
| 25 | Contributions, gifts, grants paid | 339,900. | | | 339,900. |
| 26 | Total expenses and disbursements. Add lines 24 and 25 | 790,635. | 405,080. | 373,357. | 375,736. |
| 27 | Subtract line 26 from line 12: | | | | |
| a | Excess of revenue over expenses and disbursements | 1,062,276. | | | |
| b | Net investment income (if negative, enter -0-) | | 718,832. | | |
| c | Adjusted net income (if negative, enter -0-) | | | 305,264. | |

| Part II Balance Sheets | | Attached schedules and amounts in the description column should be for end-of-year amounts only | | Beginning of year | End of year | |
|-----------------------------|--|---|----------------|-----------------------|-------------|------------|
| | | (a) Book Value | (b) Book Value | (c) Fair Market Value | | |
| Assets | 1 | Cash - non-interest-bearing | | 158,265. | 1,371,587. | 1,371,587. |
| | 2 | Savings and temporary cash investments | | 4,971,553. | 2,230,494. | 2,230,494. |
| | 3 | Accounts receivable ▶ | | | | |
| | | Less: allowance for doubtful accounts ▶ | | | | |
| | 4 | Pledges receivable ▶ | | | | |
| | | Less: allowance for doubtful accounts ▶ | | | | |
| | 5 | Grants receivable | | | | |
| | 6 | Receivables due from officers, directors, trustees, and other disqualified persons | | | | |
| | 7 | Other notes and loans receivable ▶ | 176,338. | | | |
| | | Less: allowance for doubtful accounts ▶ | 0. | 198,206. | 176,338. | 176,338. |
| | 8 | Inventories for sale or use | | | | |
| | 9 | Prepaid expenses and deferred charges | | | | |
| | 10a | Investments - U.S. and state government obligations | | 525,784. | | |
| | b | Investments - corporate stock | STMT 9 | 0. | 1,504,046. | 1,530,570. |
| | c | Investments - corporate bonds | STMT 10 | 0. | 2,025,337. | 1,939,944. |
| | 11 | Investments - land, buildings, and equipment basis ▶ | | | | |
| | Less accumulated depreciation ▶ | | | | | |
| 12 | Investments - mortgage loans | | | | | |
| 13 | Investments - other | STMT 11 | 5,903,859. | 5,519,180. | 5,519,180. | |
| 14 | Land, buildings, and equipment: basis ▶ | | | | | |
| | Less accumulated depreciation ▶ | | | | | |
| 15 | Other assets (describe ▶) | | | | | |
| 16 | Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I) | | 11,757,667. | 12,826,982. | 12,768,113. | |
| Liabilities | 17 | Accounts payable and accrued expenses | | 863,339. | 873,298. | |
| | 18 | Grants payable | | | | |
| | 19 | Deferred revenue | | | | |
| | 20 | Loans from officers, directors, trustees, and other disqualified persons | | | | |
| | 21 | Mortgages and other notes payable | | | | |
| | 22 | Other liabilities (describe ▶) | STATEMENT 12) | 120,155. | 117,235. | |
| 23 | Total liabilities (add lines 17 through 22) | | 983,494. | 990,533. | | |
| Net Assets or Fund Balances | Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> | | | | | |
| | and complete lines 24 through 26 and lines 30 and 31. | | | | | |
| | 24 | Unrestricted | | 10,774,173. | 11,836,449. | |
| | 25 | Temporarily restricted | | | | |
| | 26 | Permanently restricted | | | | |
| | Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> | | | | | |
| | and complete lines 27 through 31. | | | | | |
| | 27 | Capital stock, trust principal, or current funds | | | | |
| 28 | Paid-in or capital surplus, or land, bldg., and equipment fund | | | | | |
| 29 | Retained earnings, accumulated income, endowment, or other funds | | | | | |
| 30 | Total net assets or fund balances | | 10,774,173. | 11,836,449. | | |
| 31 | Total liabilities and net assets/fund balances | | 11,757,667. | 12,826,982. | | |

Part III Analysis of Changes in Net Assets or Fund Balances

| | | | |
|---|--|---|-------------|
| 1 | Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) | 1 | 10,774,173. |
| 2 | Enter amount from Part I, line 27a | 2 | 1,062,276. |
| 3 | Other increases not included in line 2 (itemize) ▶ | 3 | 0. |
| 4 | Add lines 1, 2, and 3 | 4 | 11,836,449. |
| 5 | Decreases not included in line 2 (itemize) ▶ | 5 | 0. |
| 6 | Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 | 6 | 11,836,449. |

Part IV Capital Gains and Losses for Tax on Investment Income

| (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.) | | (b) How acquired P - Purchase D - Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) |
|--|---|---|--|---|
| 1a | | | | |
| b | SEE ATTACHED STATEMENT | | | |
| c | | | | |
| d | | | | |
| e | | | | |
| (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | (h) Gain or (loss) (e) plus (f) minus (g) | |
| a | | | | |
| b | | | | |
| c | | | | |
| d | | | | |
| e | 1,776,000. | 1,179,968. | 596,032. | |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | | (i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h)) |
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | | |
| a | | | | |
| b | | | | |
| c | | | | |
| d | | | | |
| e | | | 596,032. | |
| 2 | Capital gain net income or (net capital loss) | { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 } | 2 | 596,032. |
| 3 | Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 | } | 3 | 150,741. |

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

Yes No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

| (a) Base period years Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio (col. (b) divided by col. (c)) |
|--|---|--|---|
| 2013 | 415,846. | 11,284,782. | .036850 |
| 2012 | 353,073. | 10,535,868. | .033512 |
| 2011 | 150,895. | 10,415,286. | .014488 |
| 2010 | 316,300. | 472,199. | .669845 |
| 2009 | 293,590. | 437,417. | .671190 |
| 2 | Total of line 1, column (d) | | 2 1.425885 |
| 3 | Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years | | 3 .285177 |
| 4 | Enter the net value of noncharitable-use assets for 2014 from Part X, line 5 | | 4 10,467,853. |
| 5 | Multiply line 4 by line 3 | | 5 2,985,191. |
| 6 | Enter 1% of net investment income (1% of Part I, line 27b) | | 6 7,188. |
| 7 | Add lines 5 and 6 | | 7 2,992,379. |
| 8 | Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions. | | 8 375,736. |

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

Table with 11 rows for excise tax calculations. Line 1: 14,377. Line 2: 0. Line 3: 14,377. Line 4: 0. Line 5: 14,377. Line 6a: 6,132. Line 7: 6,132. Line 8: 62. Line 9: 8,307. Line 11: Refunded.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns: Question, Yes, No. Row 1a: No (X). Row 1b: No (X). Row 1c: No (X). Row 2: No (X). Row 3: No (X). Row 4a: No (X). Row 4b: N/A. Row 5: No (X). Row 6: Yes (X). Row 7: Yes (X). Row 8a: NY. Row 8b: Yes (X). Row 9: No (X). Row 10: Yes (X).

Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)
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? Website address N/A
14 The books are in care of MORIC BISTRICER Telephone no. (718) 438-2804 Located at PO BOX 408, BROOKLYN, NY ZIP+4 11219
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year 15 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, securities, or other financial account in a foreign country? Yes No X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.
1a During the year did the foundation (either directly or indirectly):
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes No X
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No X
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No X
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? Yes No X
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) Yes No X
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014? 1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):
a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? Yes No X
If "Yes," list the years:
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here:
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes No X
b If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.) N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? 4b X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? Yes No

(3) Provide a grant to an individual for travel, study, or other similar purposes? Yes No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) Yes No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? Yes No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? Yes No
 Organizations relying on a current notice regarding disaster assistance check here N/A

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? Yes No
 If "Yes," attach the statement required by Regulations section 53.4945-5(d) N/A

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? Yes No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Yes No
 If "Yes" to 6b, file Form 8870. 6b X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Yes No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? Yes No
 N/A 7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

| (a) Name and address | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|---|---|---------------------------------------|
| ELSA BISTRICER 4611 12TH AVENUE BROOKLYN, NY 11219 | TRUSTEE 0.00 | 0. | 0. | 0. |
| MORIC BISTRICER 4611 12TH AVENUE BROOKLYN, NY 11219 | TRUSTEE 0.00 | 0. | 0. | 0. |
| | | | | |
| | | | | |
| | | | | |

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|------------------|---|---------------------------------------|
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Total number of other employees paid over \$50,000 0

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 | (c) Compensation |
|---|---------------------|------------------|
| NONE | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Total number of others receiving over \$50,000 for professional services ▶ 0

Part IX-A Summary of Direct Charitable Activities

| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. | Expenses |
|--|----------|
| 1 | |
| SEE STATEMENT 14 | 375,736. |
| 2 | |
| 3 | |
| 4 | |

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. |

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

| | | | |
|----------|--|-----------|-------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | |
| a | Average monthly fair market value of securities | 1a | 2,353,829. |
| b | Average of monthly cash balances | 1b | 3,214,185. |
| c | Fair market value of all other assets | 1c | 5,059,248. |
| d | Total (add lines 1a, b, and c) | 1d | 10,627,262. |
| e | 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 | 10,627,262. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 159,409. |
| 5 | Net value of noncharitable-use assets . Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 10,467,853. |
| 6 | Minimum investment return . Enter 5% of line 5 | 6 | 523,393. |

Part XI **Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part.)

| | | | |
|-----------|--|-----------|--|
| 1 | Minimum investment return from Part X, line 6 | 1 | |
| 2a | Tax on investment income for 2014 from Part VI, line 5 | 2a | |
| b | Income tax for 2014. (This does not include the tax from Part VI.) | 2b | |
| c | Add lines 2a and 2b | 2c | |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | |
| 5 | Add lines 3 and 4 | 5 | |
| 6 | Deduction from distributable amount (see instructions) | 6 | |
| 7 | Distributable amount as adjusted . Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7 | |

Part XII **Qualifying Distributions** (see instructions)

| | | | |
|----------|---|-----------|----------|
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | | |
| a | Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 | 1a | 375,736. |
| 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: | | |
| a | Suitability test (prior IRS approval required) | 3a | |
| b | Cash distribution test (attach the required schedule) | 3b | |
| 4 | Qualifying distributions . Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 375,736. |
| 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 | 0. |
| 6 | Adjusted qualifying distributions . Subtract line 5 from line 4 | 6 | 375,736. |

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

N/A

| | (a) Corpus | (b) Years prior to 2013 | (c) 2013 | (d) 2014 |
|---|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2014 from Part XI, line 7 | | | | |
| 2 Undistributed income, if any, as of the end of 2014 | | | | |
| a Enter amount for 2013 only | | | | |
| b Total for prior years: | | | | |
| 3 Excess distributions carryover, if any, to 2014: | | | | |
| a From 2009 | | | | |
| b From 2010 | | | | |
| c From 2011 | | | | |
| d From 2012 | | | | |
| e From 2013 | | | | |
| f Total of lines 3a through e | | | | |
| 4 Qualifying distributions for 2014 from Part XII, line 4: ► \$ | | | | |
| a Applied to 2013, but not more than line 2a | | | | |
| b Applied to undistributed income of prior years (Election required - see instructions) | | | | |
| c Treated as distributions out of corpus (Election required - see instructions) | | | | |
| d Applied to 2014 distributable amount | | | | |
| e Remaining amount distributed out of corpus | | | | |
| 5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a)) | | | | |
| 6 Enter the net total of each column as indicated below: | | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | | | | |
| b Prior years' undistributed income. Subtract line 4b from line 2b | | | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | | | |
| d Subtract line 6c from line 6b. Taxable amount - see instructions | | | | |
| e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount - see instr. | | | | |
| f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015 | | | | |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) | | | | |
| 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 | | | | |
| 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a | | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2010 | | | | |
| b Excess from 2011 | | | | |
| c Excess from 2012 | | | | |
| d Excess from 2013 | | | | |
| e Excess from 2014 | | | | |

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

| | Tax year | | | | (e) Total |
|--|----------|----------|---------------|----------|------------|
| | (a) 2014 | (b) 2013 | Prior 3 years | | |
| | | | (c) 2012 | (d) 2011 | |
| 2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed | 305,264. | 71,352. | 93,639. | 185,693. | 655,948. |
| b 85% of line 2a | 259,474. | 60,649. | 79,593. | 157,839. | 557,556. |
| c Qualifying distributions from Part XII, line 4 for each year listed | 375,736. | 415,846. | 353,073. | 150,895. | 1,295,550. |
| d Amounts included in line 2c not used directly for active conduct of exempt activities | 0. | 0. | 0. | 0. | 0. |
| e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c | 375,736. | 415,846. | 353,073. | 150,895. | 1,295,550. |
| 3 Complete 3a, b, or c for the alternative test relied upon: | | | | | |
| a "Assets" alternative test - enter: | | | | | |
| (1) Value of all assets | | | | | 0. |
| (2) Value of assets qualifying under section 4942(j)(3)(B)(i) | | | | | 0. |
| b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed | 348,929. | 376,159. | 351,195. | 347,176. | 1,423,459. |
| c "Support" alternative test - enter: | | | | | |
| (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) | | | | | 0. |
| (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(ii) | | | | | 0. |
| (3) Largest amount of support from an exempt organization | | | | | 0. |
| (4) Gross investment income | | | | | 0. |

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part XV Supplementary Information (continued)

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

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution ** | Amount |
|--|--|--------------------------------------|--|--|
| a Paid during the year | | | | |
| CONGREGATION KOLLEL OF FLATBUSH 45 BROADWAY NEW YORK, NY 10006 | NONE | PUBLIC CHARITY | SCHOLARSHIP FOR RELIGIOUS EDUCATIONAL PURPOSES | 40,000. |
| CONGREGATION TOLDOS ARON 199 LEE AVENUE BROOKLYN, NY 11211 | NONE | PUBLIC CHARITY | SCHOLARSHIP FOR RELIGIOUS EDUCATIONAL PURPOSES | 5,000. |
| HATZOLAH OF BORO PARK 5215 16TH AVENUE BROOKLYN, NY 11204 | NONE | PUBLIC CHARITY | SCHOLARSHIP FOR RELIGIOUS EDUCATIONAL PURPOSES | 10,000. |
| MACHON GIVOS OLAM 1403 44TH STREET BROOKLYN, NY 11219 | NONE | PUBLIC CHARITY | SCHOLARSHIP FOR RELIGIOUS EDUCATIONAL PURPOSES | 5,000. |
| NECHAMAS ZION 444 MADISON AVENUE NEW YORK, NY 10022 | NONE | PUBLIC CHARITY | SCHOLARSHIP FOR RELIGIOUS EDUCATIONAL PURPOSES | 24,000. |
| Total | | | | SEE CONTINUATION SHEET(S) ▶ 3a 339,900. |
| b Approved for future payment | | | | |
| NONE | | | | |
| | | | | |
| | | | | |
| Total | | | | ▶ 3b 0. |

THE TRUMA FOUNDATION

Part IV Capital Gains and Losses for Tax on Investment Income

| (a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co. | (b) How acquired P - Purchase D - Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) |
|---|--|--------------------------------------|----------------------------------|
| 1a 4245 KISSENA BLVD 420 COOP SHARES APT 6R | D | 12/31/09 | 11/30/14 |
| b 4245 KISSENA BLVD 471 SHARES APT 4L | D | 12/31/09 | 11/30/14 |
| c 4245 KISSENA BLVD 448 SHARES APT 4D | D | 12/31/11 | 11/30/14 |
| d 4245 KISSENA BLVD 432 SHARES APT 3P | D | 12/31/12 | 11/30/14 |
| e 3060 OCEAN AVENUE 500 SHARES APT 1S | D | | |
| f 3060 OCEAN AVENUE 260 SHARES APT 2X | D | | |
| g 2040 89TH STREET 275 SHARES APT 6D | D | 12/31/14 | 04/29/15 |
| h | | | |
| i | | | |
| j | | | |
| k | | | |
| l | | | |
| m | | | |
| n | | | |
| o | | | |

| (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | (h) Gain or (loss) (e) plus (f) minus (g) |
|-----------------------|--|---|--|
| a 235,000. | | 178,715. | 56,285. |
| b 256,000. | | 197,554. | 58,446. |
| c 236,000. | | 169,480. | 66,520. |
| d 245,000. | | 193,300. | 51,700. |
| e 294,000. | | 139,260. | 154,740. |
| f 125,000. | | 67,400. | 57,600. |
| g 385,000. | | 234,259. | 150,741. |
| h | | | |
| i | | | |
| j | | | |
| k | | | |
| l | | | |
| m | | | |
| n | | | |
| o | | | |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-") |
|---|--------------------------------------|---|---|
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | |
| a | | | 56,285. |
| b | | | 58,446. |
| c | | | 66,520. |
| d | | | 51,700. |
| e | | | 154,740. |
| f | | | 57,600. |
| g | | | ** 150,741. |
| h | | | |
| i | | | |
| j | | | |
| k | | | |
| l | | | |
| m | | | |
| n | | | |
| o | | | |

| | | |
|---|---|----------|
| 2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } | 2 | 596,032. |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 | 3 | 150,741. |

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05-01-14

** (SHORT-TERM)

Part XV . Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|--|--------------------------------------|---|-----------------|
| UJO OF WILLIAMSBURG 32 PENN STREET BROOKLYN, NY 11249 | NONE | PUBLIC CHARITY | SCHOLARSHIP FOR RELIGIOUS EDUCATIONAL PURPOSES | 22,500. |
| YESHIVA M'KOR CHAIM 1571 55TH STREET BROOKLYN, NY 11219 | NONE | PUBLIC CHARITY | SCHOLARSHIP FOR RELIGIOUS EDUCATIONAL PURPOSES | 50,000. |
| ZICHRON ELIYAHU 657 E 7TH STREET BROOKLYN, NY 11218 | NONE | PUBLIC CHARITY | SCHOLARSHIP FOR RELIGIOUS EDUCATIONAL PURPOSES | 10,000. |
| NOSSON TZVI LEVOVITZ 1200 CENTRAL AVENUE LAKEWOOD, NJ 08701 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| RABBI ARON ROSENBERG 2229 85TH STREET BROOKLYN, NY 11214 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| ARON GREENBAUM 294 7TH STREET LAKEWOOD, NJ 08701 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| BINYOMIN STERN 412 8TH STREET LAKEWOOD, NJ 08701 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| DANIEL ROSEN 168 COLONY CIRCLE LAKEWOOD, NJ 08701 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| ELIEZER BRODSKY 13 SANZ TOWN ROAD LAKEWOOD, NJ 08701 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| ELKANA HERSHBERG 119 RICKY LANE LAKEWOOD, NJ 08701 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| Total from continuation sheets | | | | 255,900. |

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|--|--|--------------------------------------|---|--------|
| ELYOKUM FLEISHMAN 61 COLES WAY LAKEWOOD, NJ 08701 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| KALMAN GOLDBERG 38 TOVA DRIVE LAKEWOOD, NJ 08701 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| MOSHE GRUEN 199 HADASSAH LANE LAKEWOOD, NJ 08701 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| MOSHE LEVY 129 6TH STREET LAKEWOOD, NJ 08701 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| NOSSON DREYFUSS 24 8TH STREET LAKEWOOD, NJ 08701 | NONE | N/A | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| RABBI AVROHOM FARKAS 1014 E 15TH STREET BROOKLYN, NY 11230 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI AVROHOM LOWY 623 EAST 8TH STREET BROOKLYN, NY 11218 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI AVROHOM MENACHEM HOROWITZ 40 MIDDLETON STREET BROOKLYN, NY 11206 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI AVROHOM RUMSTEIN 1533 EAST 7TH STREET BROOKLYN, NY 11230 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI BAURUCH DEUTCHE 1236 48TH STREET BROOKLYN, NY 11219 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| Total from continuation sheets | | | | |

Part XV. Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|--|--|--------------------------------------|---|--------|
| RABBI DOVID NOSSON LESSER 8223 20TH AVENUE BROOKLYN, NY 11214 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI ELIEZER COHEN 4521 15TH AVENUE BROOKLYN, NY 11219 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 5,400. |
| RABBI GEDALYA MAYER 148 HOOPER STREET BROOKLYN, NY 11211 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI MOSHE FRIEDMAN 1728 44TH STREET BROOKLYN, NY 11204 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI MOSHE GLICK 371 DAHILL ROAD BROOKLYN, NY 11218 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI SHIMON BLEIER 1416 40TH STREET BROOKLYN, NY 11218 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 2,400. |
| RABBI SHIMSHY HOROWITZ 1548 57TH STREET BROOKLYN, NY 11219 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,200. |
| RABBI SHLOIMY MILLWORM 1815 59TH STREET BROOKLYN, NY 11204 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI YAKKOV YISROEL FELDHEIM 560 EAST 9TH STREET BROOKLYN, NY 11218 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI YEHUDA TZVI HOCHMAN 705 EAST 2ND STREET BROOKLYN, NY 11218 | NONE | | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| Total from continuation sheets | | | | |

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|--|--------------------------------------|---|--------|
| RABBI YISROEL MOSHE WEINREB 7 WEBSTER AVENUE BROOKLYN, NY 11230 | INDIVIDUAL | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI YOEL HOCHMAN 1954 50TH STREET BROOKLYN, NY 11204 | INDIVIDUAL | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI YOEL HOFFMAN 1360 48TH STREET BROOKLYN, NY 11219 | INDIVIDUAL | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI YOSEF DOV HESS 2168 83RD STREET BROOKLYN, NY 11214 | INDIVIDUAL | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| RABBI YOSEF DOV JACOBS 1660 44TH STREET BROOKLYN, NY 11220 | INDIVIDUAL | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 7,800. |
| SHMUEL TROPPER 167 CHATEAU DRIVE LAKEWOOD, NJ 08701 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| YAAKOV WEINBERGER 101 EAST HARVARD AVENUE LAKEWOOD, NJ 08701 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| YECHESKEL GERSHBAUM 438 8TH STREET LAKEWOOD, NJ 08701 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| YECHIEL PADAWER 13 SQUAKAM ROAD LAKEWOOD, NJ 08701 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| YEHUDA LEIB WHITER 801 LEXINGTON AVENUE LAKEWOOD, NJ 08701 | NONE | INDIVIDUAL | EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR | 1,000. |
| Total from continuation sheets | | | | 1,000. |

Part XV . Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - RABBI SHIMON BLEIER

EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR

EDUCATIONAL SUPPORT AND INDIRECT FINANCIAL AID FOR THE POOR

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

THE TRUMA FOUNDATION**13-4099736**

Organization type (check one)

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

 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

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

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

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

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 THE TRUMA FOUNDATION | Employer identification number 13-4099736 |
|---|---|

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed

| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
|------------|---|----------------------------|--|
| 1 | MB 2006 LEAD TRUST 4611 12TH AVENUE BROOKLYN, NY 11219 | \$ 364,499. | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions) |
| 2 | DB 2006 LEAD TRUST 4611 12TH AVENUE BROOKLYN, NY 11219 | \$ 364,500. | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |

| | |
|---|---|
| Name of organization THE TRUMA FOUNDATION | Employer identification number 13-4099736 |
|---|---|

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed

| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
|------------------------------|---|--|----------------------|
| <u>1</u> | <u>SHARES OF A COOPERATIVE BUILDING</u> _____ _____ | \$ <u>364,499.</u> | <u>12/31/14</u> |
| <u>2</u> | <u>SHARES OF A COOPERATIVE BUILDING</u> _____ _____ | \$ <u>364,500.</u> | <u>12/31/14</u> |
| ____ | _____ _____ _____ | \$ _____ | _____ |
| ____ | _____ _____ _____ | \$ _____ | _____ |
| ____ | _____ _____ _____ | \$ _____ | _____ |
| ____ | _____ _____ _____ | \$ _____ | _____ |

Name of organization

Employer identification number

THE TRUMA FOUNDATION

13-4099736

Part III

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

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

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

| SOURCE | (A) REVENUE PER BOOKS | (B) NET INVESTMENT INCOME | (C) ADJUSTED NET INCOME |
|-------------------------|-----------------------------|---------------------------------|-------------------------------|
| CAPITAL ONE | 1,084. | 1,084. | 1,084. |
| CAPITAL ONE | 4,373. | 4,373. | 4,373. |
| MORGAN STANLEY | 181. | 181. | 181. |
| TOTAL TO PART I, LINE 3 | 5,638. | 5,638. | 5,638. |

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
|-------------------|-----------------|-------------------------------|-----------------------------|-----------------------------------|-------------------------------|
| MORGAN STANLEY | 220,020. | 0. | 220,020. | 220,020. | 220,020. |
| TO PART I, LINE 4 | 220,020. | 0. | 220,020. | 220,020. | 220,020. |

FORM 990-PF RENTAL INCOME STATEMENT 3

| KIND AND LOCATION OF PROPERTY | ACTIVITY NUMBER | GROSS RENTAL INCOME |
|---------------------------------------|--------------------|------------------------|
| COOPERATIVE APARTMENTS | 1 | 302,222. |
| TOTAL TO FORM 990-PF, PART I, LINE 5A | | 302,222. |

FORM 990-PF RENTAL EXPENSES STATEMENT 4

| DESCRIPTION | ACTIVITY NUMBER | AMOUNT | TOTAL |
|---|--------------------|----------|----------|
| MAINTENANCE EXPENSES | | 348,182. | |
| MANAGEMENT FEE | | 2,787. | |
| LEGAL FEES | | 11,700. | |
| INSURANCE | | 10,688. | |
| - SUBTOTAL - | 1 | | 373,357. |
| TOTAL RENTAL EXPENSES | | | 373,357. |
| NET RENTAL INCOME TO FORM 990-PF, PART I, LINE 5B | | | -71,135. |

| FORM 990-PF | ACCOUNTING FEES | | | STATEMENT 5 |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| ACCOUNTING | 13,500. | 10,000. | 0. | 3,500. |
| TO FORM 990-PF, PG 1, LN 16B | 13,500. | 10,000. | 0. | 3,500. |

| FORM 990-PF | OTHER PROFESSIONAL FEES | | | STATEMENT 6 |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| PROFESSIONAL | 2,792. | 2,792. | 0. | 0. |
| TO FORM 990-PF, PG 1, LN 16C | 2,792. | 2,792. | 0. | 0. |

| FORM 990-PF | TAXES | | | STATEMENT 7 |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| PAYROLL TAXES | 2,869. | 1,435. | 0. | 1,434. |
| FEDERAL EXCISE TAX | 9,819. | 0. | 0. | 0. |
| TO FORM 990-PF, PG 1, LN 18 | 12,688. | 1,435. | 0. | 1,434. |

| FORM 990-PF | OTHER EXPENSES | | | STATEMENT 8 |
|---|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| TRAVEL | 5,116. | 0. | 0. | 5,116. |
| OFFICE EXPENSE | 1,162. | 581. | 0. | 581. |
| INSURANCE | 2,906. | 0. | 0. | 2,906. |
| FELLOWSHIPS & SCHOLARSHIPS UNDER 1,000 | 3,600. | 0. | 0. | 3,600. |
| COMPUTER SERVICES | 3,829. | 1,915. | 0. | 1,914. |

| | | | | |
|-----------------------------|----------|----------|----------|---------|
| DUES | 1,200. | 0. | 0. | 1,200. |
| MAINTENANCE EXPENSES | 348,182. | 348,182. | 348,182. | 0. |
| MANAGEMENT FEE | 2,787. | 2,787. | 2,787. | 0. |
| LEGAL FEES | 11,700. | 11,700. | 11,700. | 0. |
| INSURANCE | 10,688. | 10,688. | 10,688. | 0. |
| TO FORM 990-PF, PG 1, LN 23 | 391,170. | 375,853. | 373,357. | 15,317. |

FORM 990-PF CORPORATE STOCK STATEMENT 9

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|---|------------|-------------------|
| MORGAN STANLEY 6.375% | 1,504,046. | 1,530,570. |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 1,504,046. | 1,530,570. |

FORM 990-PF CORPORATE BONDS STATEMENT 10

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|---|------------|-------------------|
| CITIGROUP INC 6.3% | 1,498,728. | 1,441,194. |
| WELLS FARGO & CO 7.98% | 526,609. | 498,750. |
| TOTAL TO FORM 990-PF, PART II, LINE 10C | 2,025,337. | 1,939,944. |

FORM 990-PF OTHER INVESTMENTS STATEMENT 11

| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
|--|------------------|------------|-------------------|
| INVESTMENT 3060 | COST | 1,676,975. | 1,676,975. |
| INVESTMENT 4245 | COST | 2,971,237. | 2,971,237. |
| INVESTMENT 2040 | COST | 870,968. | 870,968. |
| TOTAL TO FORM 990-PF, PART II, LINE 13 | | 5,519,180. | 5,519,180. |

FORM 990-PF OTHER LIABILITIES STATEMENT 12

| DESCRIPTION | BOY AMOUNT | EOY AMOUNT |
|--|------------|------------|
| PAYROLL TAXES PAYABLE | 646. | 547. |
| SECURITY DEPOSIT PAYABLE | 22,131. | 22,833. |
| DUE TO MBDM 4245 | 32,848. | 32,848. |
| DUE TO 20-40 89TH STREET | 64,530. | 61,007. |
| TOTAL TO FORM 990-PF, PART II, LINE 22 | 120,155. | 117,235. |

FORM 990-PF LIST OF SUBSTANTIAL CONTRIBUTORS STATEMENT 13
PART VII-A, LINE 10

| NAME OF CONTRIBUTOR | ADDRESS |
|---------------------|--|
| MB2006 LEAD TRUST | 4611 12TH AVENUE BROOKLYN, NY 11219 |
| DB2006 LEAD TRUST | 4611 12TH AVENUE BROOKLYN, NY 11219 |

FORM 990-PF SUMMARY OF DIRECT CHARITABLE ACTIVITIES STATEMENT 14

ACTIVITY ONE

FINANCIAL AID AND PROGRAMS FOR PERSONS IN NEED AND CONTRIBUTIONS TO AUTHORIZED INDIVIDUALS TO CARRY ON CHARITABLE, RELIGIOUS, SCIENTIFIC, LITERARY OR EDUCATIONAL ACTIVITIES

| | EXPENSES |
|-----------------------------------|----------|
| TO FORM 990-PF, PART IX-A, LINE 1 | 375,736. |