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**Return of Private Foundation  
or Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation****Note:** The foundation may be able to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-0052

**2008****For calendar year 2008, or tax year beginning** 10/01 **, 2008, and ending** 9/30 **, 2009****G** Check all that apply ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name changeUse the  
IRS label.  
Otherwise,  
print  
or type.  
See Specific  
Instructions.**BARRY S. & EVELYN STRAUCH  
FOUNDATION, INC.  
1468 EVANS FARM DRIVE  
MCLEAN, VA 22101-5652****A** Employer identification number

54-1407386

**B** Telephone number (see the instructions)

703-356-7104

**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 ☐**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, column (c), line 16)

\$ 1,380,446.

**J** Accounting method ☒ Cash ☐ Accrual  
☐ Other (specify) \_\_\_\_\_

(Part I, column (d) must be on cash basis)

**Part I Analysis of Revenue and Expenses**

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions).)

**(a)** Revenue and expenses per books**(b)** Net investment income**(c)** Adjusted net income**(d)** Disbursements for charitable purposes (cash basis only)**REVENUE****1** Contributions, gifts, grants, etc., received (att sch)

11,141.

**2** Ck ☐ if the foundn is not req to att Sch B**3** Interest on savings and temporary cash investments

894.

894.

894.

**4** Dividends and interest from securities

29,237.

29,237.

28,237.

**5a** Gross rents**b** Net rental income or (loss)**6a** Net gain/(loss) from sale of assets not on line 10

597.

**b** Gross sales price for all assets on line 6a 416,609.**7** Capital gain net income (from Part IV, line 2)

597.

**8** Net short-term capital gain

0.

**9** Income modifications

350.

**10a** Gross sales less returns and allowances**b** Less Cost of goods sold**c** Gross profit/(loss) (att sch)**11** Other income (attach schedule)**12 Total.** Add lines 1 through 11

41,869.

30,728.

29,481.

**ADMINISTRATIVE EXPENSES****13** Compensation of officers, directors, trustees, etc.

0.

**14** Other employee salaries and wages**15** Pension plans, employee benefits**16a** Legal fees (attach schedule)**b** Accounting fees (attach sch) See St 1

1,050.

1,050.

**c** Other prof fees (attach sch) See St 2

3,274.

3,274.

**17** Interest**18** Taxes (attach schedule) See Stmt 3

2,807.

2,807.

**19** Depreciation (attach sch) and depletion**20** Occupancy**21** Travel, conferences, and meetings**22** Printing and publications**23** Other expenses (attach schedule)

See Statement 4

227.

227.

**24 Total operating and administrative expenses.** Add lines 13 through 23

7,358.

7,131.

227.

**25** Contributions, gifts, grants paid Part XV

186,600.

186,600.

**26 Total expenses and disbursements.** Add lines 24 and 25

193,958.

7,131.

0.

186,827.

**27** Subtract line 26 from line 12:**a** Excess of revenue over expenses and disbursements

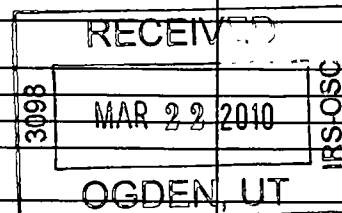
-152,089.

**b** Net investment income (if negative, enter -0-)

23,597.

**c** Adjusted net income (if negative, enter -0-)

29,481.



248

**Part II Balance Sheets**

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)

Beginning of year

End of year

		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>ASSETS</b>	1 Cash — non-interest-bearing	30,450.	40,308.	40,308.
	2 Savings and temporary cash investments	245,147.	128,548.	128,548.
	3 Accounts receivable			
	Less: allowance for doubtful accounts			
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule)	1,241,010.	1,196,012.	1,211,590.
	c Investments — corporate bonds (attach schedule)			
	<b>LIABILITIES</b>	11 Investments — land, buildings, and equipment: basis		
Less: accumulated depreciation (attach schedule)				
12 Investments — mortgage loans				
13 Investments — other (attach schedule)				
14 Land, buildings, and equipment: basis		2,576.		
Less: accumulated depreciation (attach schedule) See Stmt 5		2,576.		
15 Other assets (describe)				
16 <b>Total assets</b> (to be completed by all filers — see instructions. Also, see page 1, item I)		1,516,607.	1,364,868.	1,380,446.
17 Accounts payable and accrued expenses				
18 Grants payable				
19 Deferred revenue				
20 Loans from officers, directors, trustees, & other disqualified persons				
21 Mortgages and other notes payable (attach schedule)				
22 Other liabilities (describe)				
23 <b>Total liabilities</b> (add lines 17 through 22)	0.	0.		
<b>NET ASSET BALANCES</b>	<b>Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.</b> <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b> <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	1,516,607.	1,364,868.	
	30 <b>Total net assets or fund balances</b> (see the instructions)	1,516,607.	1,364,868.	
	31 <b>Total liabilities and net assets/fund balances</b> (see the instructions)	1,516,607.	1,364,868.	

**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	1,516,607.
2 Enter amount from Part I, line 27a	2	-152,089.
3 Other increases not included in line 2 (itemize) See Statement 6	3	350.
4 Add lines 1, 2, and 3	4	1,364,868.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	1,364,868.

**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 shares MLC Company)

(b) How acquired  
P — Purchase  
D — Donation(c) Date acquired  
(month, day, year)(d) Date sold  
(month, day, year)

<b>1a</b> VARIOUS SEE ATTACHED SCHEDULE	D	Various	Various
<b>b</b> Capital gain dividends			
<b>c</b>			
<b>d</b>			
<b>e</b>			

(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)
<b>a</b> 413,226.		416,012.	-2,786.
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
<b>a</b>			-2,786.
<b>b</b>			3,383.
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> 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 ]	<b>2</b>	597.
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	[ If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8 ]	<b>3</b>	-32,643.

**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 (column (b) divided by column (c))
2007	196,547.	1,641,801.	0.119714
2006	167,995.	1,645,989.	0.102063
2005	582,047.	1,598,114.	0.364209
2004	76,953.	1,468,619.	0.052398
2003	86,076.	1,479,208.	0.058191

<b>2</b> Total of line 1, column (d)	<b>2</b>	0.696575
<b>3</b> 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	<b>3</b>	0.139315
<b>4</b> Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	<b>4</b>	1,311,474.
<b>5</b> Multiply line 4 by line 3	<b>5</b>	182,708.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	236.
<b>7</b> Add lines 5 and 6	<b>7</b>	182,944.
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	186,827.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1 Date of ruling letter: _____ (attach copy of ruling letter if necessary – see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	236.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	236.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-		5	236.
6 Credits/Payments:			
a 2008 estimated tax pmts and 2007 overpayment credited to 2008	6a		
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7		0.
8 Enter any <b>penalty</b> for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		236.
10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2009 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

**Part VII-A Statements Regarding Activities**

	Yes	No
1 a 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		X
c Did the foundation file <b>Form 1120-POL</b> for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities.</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?		X
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) VA		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If 'No,' attach explanation</i>	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 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

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Form 990-PF (2008)

**Part VII-A Statements Regarding Activities Continued**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>BARRY &amp; EVELYN STRAUCH</u> Telephone no <u>703-356-7104</u> Located at <u>1113 LANGLEY LANE MCLEAN, VA</u> ZIP + 4 <u>22101</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>	N/A		

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

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.

	Yes	No
<b>1 a</b> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(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) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1 b	N/A
<b>c</b> 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 2008?	1 c	X
<b>2</b> 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)).		
<b>a</b> At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u> .		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> 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 the instructions.)	2 b	N/A
<b>c</b> If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u> .		
<b>3 a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b> If 'Yes,' did it have excess business holdings in 2008 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 2008.)	3 b	N/A
<b>4 a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
<b>b</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 2008?	4 b	X

BAA

Form 990-PF (2008)

**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 509(a)(1), (2), or (3), or section 4940(d)(2)? (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)?

5b N/A

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?N/A ☐ Yes ☐ No

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d).

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

6b X

If you answered 'Yes' to 6b, also file Form 8870

**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?

7b N/A

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
EVELYN M. STRAUCH 1468 EVANS FARM DRIVE MCLEAN, VA 22101	President 0	0.	0.	0.
BARRY S. STRAUCH, MD 1468 EVANS FARM DRIVE MCLEAN, VA 22101	Secretary/Tr 0	0.	0.	0.

**2** Compensation of five highest-paid employees (other than those included on line 1— see instructions). If none, enter 'NONE.'

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

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

0

<b>Part VIII</b>	<b>Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors</b> <i>(continued)</i>
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**3 Five highest-paid independent contractors for professional services – (see instructions). If none, enter 'NONE.'**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None		
Total number of others receiving over \$50,000 for professional services		

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

1	N/A	
2		
3		
4		

**Part IX-B Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

1	N/A	
2		
All other program-related investments. See instructions		
3		
Total. Add lines 1 through 3		0

**BAA**



**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	1,095,014.
b	Average of monthly cash balances	1b	236,432.
c	Fair market value of all other assets (see instructions)	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	1,331,446.
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	1,331,446.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	19,972.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,311,474.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	65,574.

**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	65,574.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	236.
b	Income tax for 2008 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	236.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	65,338.
4	Recoveries of amounts treated as qualifying distributions	4	350.
5	Add lines 3 and 4	5	65,688.
6	Deduction from distributable amount (see instructions)	6	
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	65,688.

**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	186,827.
b	Program-related investments — total from Part IX-B	1b	
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	186,827.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	236.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	186,591.

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

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				65,688.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			0.	
b Total for prior years: 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2008:				
a From 2003	13,362.			
b From 2004	4,511.			
c From 2005	509,985.			
d From 2006	90,944.			
e From 2007	118,492.			
f Total of lines 3a through e	737,294.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 186,827.				
a Applied to 2007, 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 2008 distributable amount				65,688.
e Remaining amount distributed out of corpus	121,139.			
5 Excess distributions carryover applied to 2008 (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	858,433.			
b Prior years' undistributed income. Subtract 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 2007. Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2009				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7 (see instructions)	13,362.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	845,071.			
10 Analysis of line 9:				
a Excess from 2004	4,511.			
b Excess from 2005	509,985.			
c Excess from 2006	90,944.			
d Excess from 2007	118,492.			
e Excess from 2008	121,139.			

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

N/A

- 1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, 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

- 2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for 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 exempt activities

- e** Qualifying distributions made directly for active conduct of exempt activities  
Subtract line 2d from line 2c .

- 3** Complete 3a, b, or c for the alternative test relied upon:

- a 'Assets' alternative test – enter:

- (1) Value of all assets**

- (2) Value of assets qualifying under section 4942(j)(3)(B)(i)**

- b** 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

- c 'Support' alternative test – enter

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2)** Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

- (3)** Largest amount of support from an exempt organization

- (4) Gross investment income.**

[illegible]

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

### 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 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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a</i> Paid during the year SEE ATTACHED SCHEDULE ,			TO FUND ORGANIZATION'S PROGRAMS - UNDESIGNATED GIFTS	186,600.
<b>Total</b>				<b>186,600.</b>
<i>b</i> Approved for future payment				
<b>Total</b>				





**Schedule B**  
(Form 990, 990-EZ,  
or 990-PF)

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

► Attach to Form 990, 990-EZ and 990-PF  
► See separate instructions.

OMB No 1545-0047

**2008**

Name of the organization **BARRY S. & EVELYN STRAUCH  
FOUNDATION, INC.**

Employer identification number  
**54-1407386**

**Organization type** (check one)

**Filers of:**

Form 990 or 990-EZ

**Section:**

- ☐ 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 foundation

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

**General Rule –**

- ☒ For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor (Complete Parts I and II)

**Special Rules –**

- ☐ For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33-1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1 Complete Parts I and II
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to 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 of \$5,000 or more during the year.) ► \$ \_\_\_\_\_

**Caution:** Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF) but they **must** answer 'No' on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

**BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. These instructions will be issued separately.**

**Schedule B** (Form 990, 990-EZ, or 990-PF) (2008)

BARRY S. &amp; EVELYN STRAUCH

54-1407386

**Part I Contributors** (see instructions )

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Barry & Evelyn Strauch 1468 Evans Farm Drive McLean, VA 22101	\$ 89,394.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution )
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
—		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
—		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
—		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
—		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
—		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
—		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )



Employer identification number

54-1407386

## Part II

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	1,700 SHS OF CELGENE COMMON STOCK		
		\$ 89,394.	12/17/08
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____			
		\$ _____	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____			
		\$ _____	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____			
		\$ _____	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____			
		\$ _____	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____			
		\$ _____	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____			
		\$ _____	

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

Name of organization

Employer identification number

BARRY S. &amp; EVELYN STRAUCH

54-1407386

**Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year.** (Complete cols (a) through (e) and the following line entry )For organizations completing Part III, enter total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year (Enter this information once — see instructions )

► \$ N/A

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

2008

## Federal Statements

Page 1

Client 6

BARRY S. & EVELYN STRAUCH  
FOUNDATION, INC.

54-1407386

1/07/10

09 48AM

Statement 1  
Form 990-PF, Part I, Line 16b  
Accounting Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
ACCOUNTING	\$ 1,050.	\$ 1,050.		
Total	\$ 1,050.	\$ 1,050.	\$ 0.	\$ 0.

Statement 2  
Form 990-PF, Part I, Line 16c  
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
OTHER PROFESSIONAL FEES	\$ 3,274.	\$ 3,274.		
Total	\$ 3,274.	\$ 3,274.	\$ 0.	\$ 0.

Statement 3  
Form 990-PF, Part I, Line 18  
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
FEDERAL EXCISE TAX	\$ 2,807.	\$ 2,807.		
Total	\$ 2,807.	\$ 2,807.	\$ 0.	\$ 0.

Statement 4  
Form 990-PF, Part I, Line 23  
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
BANK FEES	\$ 150.			\$ 150.
OFFICE EXPENSE	52.			52.
STATE FILING FEES	25.			25.
Total	\$ 227.	\$ 0.	\$ 0.	\$ 227.

2008

## Federal Statements

Page 2

Client 6

BARRY S. & EVELYN STRAUCH  
FOUNDATION, INC.

54-1407386

1/07/10

09 48AM

Statement 5  
Form 990-PF, Part II, Line 14  
Land, Buildings, and Equipment

Category	Basis	Accum. Deprec.	Book Value	Fair Market Value
Machinery and Equipment	\$ 2,576.	\$ 2,576.	\$ 0.	\$ 0.
Total	<u>\$ 2,576.</u>	<u>\$ 2,576.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

Statement 6  
Form 990-PF, Part III, Line 3  
Other Increases

PRIOR YR GRANTS RETURNED

Total	\$ 350.
	<u>\$ 350.</u>

**BARRY S. & EVELYN M. STRAUCH FOUNDATION, INC.**  
**EIN 54-1407386**  
**9/30/2009**

Part XV, Line 3

<u>NAME</u>	<u>PURPOSE</u>	<u>AMOUNT</u>
American Kidney Foundation 6110 Executive Boulevard, Suite 1010 Rockville, MD 20852	To fund organization's program Undesignated gift	\$250 00
Aspen Music Festival 2 Music School Road Aspen, CO 81611	To fund organization's program Undesignated gift	\$100.00
Boys and Girls Club of Greater Washington 8380 Colesville Road, Suite 600 Silver Spring, MD 20910	To fund organization's program Undesignated gift	\$1,000 00
Bravo! Vail Music Festival 2271 N Frontage R West, Suite 3 Vail, CO 81657	To fund organization's program Undesignated gift	\$2,000 00
CARE 660 First Ave New York, N.Y. 10157	To fund organization's program Undesignated gift	\$1,000.00
CATO Institute 1000 Massachusetts Ave. NW Washington, DC 20001-5403	To fund organization's program Undesignated gift	\$100 00
DC Scores 1201 U Street, NW, 3rd Floor Washington, D C. 20009	To fund organization's program Undesignated gift	\$250 00
Dartmouth Alumni Fund Blunt Alumni Center Hanover, NH 03755	To fund organization's program Undesignated gift	\$100 00
Fisher House Foundation 1401 Rockville Pike Rockville, MD 20852	To fund organization's program Undesignated gift	\$1,000 00
Futures for Children 9600 Tennyson Street, NE Albuquerque, NM 87122	To fund organization's program Undesignated gift	\$100.00
Hebrew Home of Greater Washington 6121 Montrose Road Rockville, MD 20852	To fund organization's program Undesignated gift	\$500.00
INOVA Health System Foundation 8110 Gatehouse Road, Suite 200E Falls Church, VA 22042-1210	To fund organization's program Undesignated gift	\$26,500 00

**BARRY S. & EVELYN M. STRAUCH FOUNDATION, INC.**  
**EIN 54-1407386**  
**9/30/2009**

Part XV, Line 3

<u>NAME</u>	<u>PURPOSE</u>	<u>AMOUNT</u>
Jewish Council for the Aging of Greater Washington 11820 Parklawn Dr. #200 Rockville, MD 20852	To fund organization's program Undesignated gift	\$600.00
John Hopkins University One Charles Center 100 North Charles Street, Suite 208 Baltimore, MD 21207	To fund organization's program Undesignated gift	\$100,000 00
Kennedy Center National Symphony Orchestra 2700 F Street NW Washington, DC 20566	To fund organization's program Undesignated gift	\$12,000 00
Kennedy Center Honors 2700 F Street, NW Washington, DC 20566	To fund organization's program Undesignated gift	\$600 00
Local Initiatives Support Collaborative 1825 K Street, NW Suite 100 Washington, DC 20006	To fund organization's program Undesignated gift	\$10,000 00
McLean Project for the Arts 1234 Ingleside Avenue McLean, VA 22101	To fund organization's program Undesignated gift	\$175 00
Metropolitan Opera Guild 30 Lincoln Center New York, NY 10133	To fund organization's program Undesignated gift	\$100.00
Museum of Modern Art 11 West 53 Street New York, NY 10019	To fund organization's program Undesignated gift	\$150 00
National Gallery of Art Constitution Avenue, NW Washington, D.C.	To fund organization's program Undesignated gift	\$10,000 00
National Geographic Society 17th and M Streets, NW Washington, D.C. 20036	To fund organization's program Undesignated gift	\$1,000.00
National Kidney Foundation of the National Capital Area, Inc. 5335 Wisconsin Avenue, NW, Suite 300 Washington, D.C. 20015	To fund organization's program Undesignated gift	\$250.00
Queens College Foundation	To fund organization's program	\$250.00

**BARRY S. & EVELYN M. STRAUCH FOUNDATION, INC.**  
**EIN 54-1407386**  
**9/30/2009**

Part XV, Line 3

<u>NAME</u>	<u>PURPOSE</u>	<u>AMOUNT</u>
Office of Development 65-30 Kissena Boulevard Flushing , NY 11367	Undesignated gift	
Smithsonian Institute Washington, D.C. 20560	To fund organization's program Undesignated gift	\$350.00
S.O.M.E. - So Others Might Eat 71 O Street, NW Washington, D.D. 20001	To fund organization's program Undesignated gift	\$1,000 00
Steadman Hawkins Research Foundation 181 W Meadow Drive, Suite 1000 Vail, CO 81657	To fund organization's program Undesignated gift	\$500 00
The Amadeus Concerts, Inc. P.O. Box 543 Great Falls, VA 22066-0543	To fund organization's program Undesignated gift	\$500 00
The Aspen Institute 1 Dupont Circle NW, Suite 700 Washington, D.C. 20036-1133	To fund organization's program Undesignated gift	\$3,500 00
The Atlantic Council of the United States 1101 15th Street NW, 11th Floor Washington, D.C. 20005	To fund organization's program Undesignated gift	\$1,000.00
The Jewish Federation of Greater Washington 6101 Montrose Road Rockville, MD 20852	To fund organization's program Undesignated gift	\$1,000 00
The Judy Steinberg Hebrew Academy of Palm Beach 13205 U.S. Highway 1 Juno Beach, FL 33408	To fund organization's program Undesignated gift	\$200 00
The Phillips Collection 1600 21st Street Washington, D.C. 20036	To fund organization's program Undesignated gift	\$2,000 00
The Potomac School 1301 Potomac School Road McLean, VA 22101	To fund organization's program Undesignated gift	\$250.00
United States Holocaust Memorial Museum 100 Raoul Wallenberg Place, SW Washington, DC 20024	To fund organization's program Undesignated gift	\$100.00
Vail Valley Foundation	To fund organization's program	\$1,250.00

**BARRY S. & EVELYN M. STRAUCH FOUNDATION, INC.**  
**EIN 54-1407386**  
**9/30/2009**

Part XV, Line 3

<u>NAME</u>	<u>PURPOSE</u>	<u>AMOUNT</u>
90 Benchmark Road, Suite 300 Avon, CO 81620	Undesignated gift	
Vail Valley Medical Center 181 W. Meadow Drive Vail, CO 81657	To fund organization's program Undesignated gift	\$750 00
Washington Regional Association of Grantmakers 1400 16th Street, NW Washington, D.C. 20036	To fund organization's program Undesignated gift	\$5,675.00
Washington Tennis Education Foundation 1600 Kennedy Street, NW Washington, DC 20011	To fund organization's program Undesignated gift	\$250.00
Wolf Trap Foundation 1629 Trap Road Vienna, VA 22180	To fund organization's program Undesignated gift	\$150 00
Yale University 100 Church Street South New Haven, CT 06515	To fund organization's program Undesignated gift	\$100 00
	<b>TOTAL CONTRIBUTIONS</b>	<b><u>\$186,600.00</u></b>



## Capital Gain & Loss

Statement for the period 10/01/08 to 09/30/09

STRAUCH, BARRY S & EVELYN (918)

Tax ID: 54-1407386

Sorted by security description, sold date

Trade date basis

Shares/ par value	Date acquired	Date sold	Proceeds	Original cost basis	Adjustments	Adjusted cost basis	Gain/ loss
<b>8G2148 THE STRAUCH FOUNDATION</b>							
<b>Long term gain loss</b>							
<b>13342B105 / CAMERON INTL CORP</b>							
20.00	02/05/2008	03/27/2009	\$487.62	\$800.78	\$0.00	\$800.78	(\$333.16)
55.00	05/04/2007	03/27/2009	\$1,285.96	\$1,866.08	\$0.00	\$1,866.08	(\$580.12)
45.00	05/04/2007	03/31/2009	\$1,000.61	\$1,526.80	\$0.00	\$1,526.80	(\$526.19)
5.00	05/07/2007	03/31/2009	\$111.18	\$169.04	\$0.00	\$169.04	(\$57.86)
50.00	05/07/2007	04/01/2009	\$1,090.53	\$1,690.44	\$0.00	\$1,690.44	(\$598.91)
95.00	05/07/2007	04/02/2009	\$2,217.92	\$3,211.83	\$0.00	\$3,211.83	(\$993.91)
<b>Total</b>			<b>\$6,173.82</b>	<b>\$9,264.97</b>	<b>\$0.00</b>	<b>\$9,264.97</b>	<b>(\$3,091.15)</b>
<b>151020104 / CELGENE CORP</b>							
180.00	01/06/2006	01/15/2009	\$8,787.73	\$6,082.20	\$0.00	\$6,082.20	\$2,705.53
100.00	02/10/2006	01/15/2009	\$4,882.07	\$3,367.75	\$0.00	\$3,367.75	\$1,514.32
2.00	12/07/2004	01/15/2009	\$97.64	\$28.53	\$0.00	\$28.53	\$69.11
200.00	08/25/2005	01/15/2009	\$9,764.15	\$4,819.00	\$0.00	\$4,819.00	\$4,945.15
100.00	02/03/2006	01/15/2009	\$4,882.07	\$3,486.16	\$0.00	\$3,486.16	\$1,395.91
242.00	12/03/2004	01/15/2009	\$11,814.62	\$3,478.90	\$0.00	\$3,478.90	\$8,335.72
58.00	12/06/2004	01/15/2009	\$2,733.96	\$798.35	\$0.00	\$798.35	\$1,935.61
78.00	01/28/2004	01/15/2009	\$3,710.37	\$777.39	\$0.00	\$777.39	\$2,932.98
176.00	01/30/2004	01/15/2009	\$8,592.45	\$1,785.81	\$0.00	\$1,785.81	\$6,806.64
40.00	02/18/2004	01/15/2009	\$1,952.83	\$398.35	\$0.00	\$398.35	\$1,554.48
16.00	01/26/2004	01/15/2009	\$781.13	\$174.21	\$0.00	\$174.21	\$606.92
192.00	01/27/2004	01/15/2009	\$9,373.58	\$2,069.52	\$0.00	\$2,069.52	\$7,304.06
196.00	01/28/2004	01/15/2009	\$9,588.86	\$2,055.87	\$0.00	\$2,055.87	\$7,512.99
124.00	02/19/2004	01/15/2009	\$6,053.77	\$1,222.66	\$0.00	\$1,222.66	\$4,831.11
<b>Total</b>			<b>\$82,995.23</b>	<b>\$30,544.70</b>	<b>\$0.00</b>	<b>\$30,544.70</b>	<b>\$52,450.53</b>

Footnote Reference # and Description

81 - OID on sale, 82 - Capital gain or loss allocated on 12/31 from participation in common trust funds

83 - Mark-to-Market adjustment under IRC section 1256, 64 - Miscellaneous cost adjustment to property reflect gain or loss

65 - Inherited property - Long-term holding period, 66 - Adjustment for the non-reportable amount of gain or loss attributable to accrued market discount

# Bessemer Trust

## Capital Gain & Loss

Statement for the period 10/01/08 to 09/30/09

STRAUCH, BARRY S & EVELYN (918)

Tax ID: 54-1407386

Sorted by security description, sold date  
Trade date basis

Page 2 of 9 - 8G2148

Shares/ par value	Date acquired	Date sold	Proceeds	Original cost basis	Adjustments	Adjusted cost basis	Gain/ loss
<b>8G2148 THE STRAUCH FOUNDATION</b>							
<b>Long term gain loss</b>							
<b>165167107 / CHESAPEAKE ENERGY CORP</b>							
50.00	05/12/2008	08/14/2009	\$1,176.45	\$2,793.00	\$0.00	\$2,793.00	(\$1,616.55)
<b>17275R102 / CISCO SYSTEMS INC</b>							
60.00	09/08/2005	07/14/2009	\$1,122.11	\$1,112.20	\$0.00	\$1,112.20	\$9.91
40.00	11/17/2005	07/14/2009	\$748.08	\$692.48	\$0.00	\$692.48	\$55.60
<b>Total</b>			<b>\$1,870.19</b>	<b>\$1,804.68</b>	<b>\$0.00</b>	<b>\$1,804.68</b>	<b>\$65.51</b>
<b>219350105 / CORNING INC</b>							
50.00	09/26/2006	03/26/2009	\$706.26	\$1,210.16	\$0.00	\$1,210.16	(\$503.90)
150.00	09/03/2007	03/26/2009	\$2,118.78	\$3,591.35	\$0.00	\$3,591.35	(\$1,472.57)
100.00	05/01/2007	03/30/2009	\$1,271.41	\$2,344.92	\$0.00	\$2,344.92	(\$1,073.51)
50.00	05/02/2007	03/30/2009	\$635.70	\$1,196.84	\$0.00	\$1,196.84	(\$561.14)
50.00	08/03/2007	03/30/2009	\$635.70	\$1,197.11	\$0.00	\$1,197.11	(\$561.41)
<b>Total</b>			<b>\$5,367.85</b>	<b>\$9,540.38</b>	<b>\$0.00</b>	<b>\$9,540.38</b>	<b>(\$4,172.53)</b>
<b>234687106 / DISNEY (WALT) HOLDING CO</b>							
50.00	09/28/2001	02/03/2009	\$999.01	\$906.85	\$0.00	\$906.85	\$92.16
<b>268648102 / EMC CORP</b>							
100.00	08/22/2008	09/16/2009	\$1,695.14	\$1,575.85	\$0.00	\$1,575.85	\$119.29
50.00	08/28/2008	09/16/2009	\$847.57	\$785.28	\$0.00	\$785.28	\$62.29
50.00	08/28/2008	09/17/2009	\$847.04	\$785.27	\$0.00	\$785.27	\$61.77
50.00	08/25/2008	09/17/2009	\$847.04	\$780.64	\$0.00	\$780.64	\$66.40
<b>Total</b>			<b>\$4,236.79</b>	<b>\$3,927.04</b>	<b>\$0.00</b>	<b>\$3,927.04</b>	<b>\$309.75</b>
<b>31428X106 / FEDEX CORP</b>							
25.00	01/24/2006	10/24/2008	\$1,436.96	\$2,522.85	\$0.00	\$2,522.85	(\$1,085.89)

Footnote Reference # and Description

61 - OID on sale, 62 - Capital gain or loss allocated on 12/31 from participation in common trust funds

63 - Mark-to-Market adjustment under IRC section 1256, 64 - Miscellaneous cost adjustment to properly reflect gain or loss

65 - Inherited property - Long-term holding period, 66 - Adjustment for the non-reportable amount of gain or loss attributable to accrued market discount

Report run on Oct 6, 2009 by Administrator  
Version GP8.4.1.2

# Bessemer Trust

## Capital Gain & Loss

Statement for the period 10/01/08 to 09/30/09

STRAUCH, BARRY S & EVELYN (918)

Tax ID: 54-1407386

Sorted by security description, sold date

Trade date basis

Page 3 of 9 - 8G2148

Shares/ par value	Date acquired	Date sold	Proceeds	Original cost basis	Adjustments	Adjusted cost basis	Gain/ loss
<b>8G2148 THE STRAUCH FOUNDATION</b>							
<b>Long term gain loss</b>							
<b>31428X106 / FEDEX CORP</b>							
25.00	02/01/2006	10/24/2008	\$1,436.96	\$2,498.46	\$0.00	\$2,498.46	(\$1,061.50)
25.00	08/13/2003	10/27/2008	\$1,415.98	\$1,816.75	\$0.00	\$1,816.75	(\$200.77)
50.00	06/26/2003	10/27/2008	\$2,831.95	\$3,118.81	\$0.00	\$3,118.81	(\$286.86)
8.00	05/08/2004	10/27/2008	\$453.11	\$576.16	\$0.00	\$576.16	(\$123.05)
<b>Total</b>			<b>\$7,574.96</b>	<b>\$10,333.03</b>	<b>\$0.00</b>	<b>\$10,333.03</b>	<b>(\$2,758.07)</b>
<b>443683107 / HUDSON CITY BANCORP INC</b>							
50.00	10/09/2006	08/21/2009	\$689.95	\$672.93	\$0.00	\$672.93	(\$2.98)
50.00	10/19/2006	08/21/2009	\$689.94	\$687.10	\$0.00	\$687.10	\$2.84
50.00	10/19/2006	08/24/2009	\$686.89	\$687.10	\$0.00	\$687.10	(\$0.41)
50.00	10/06/2006	08/24/2009	\$686.69	\$687.08	\$0.00	\$687.08	(\$0.39)
50.00	10/08/2006	08/26/2009	\$652.99	\$667.08	\$0.00	\$667.08	(\$14.09)
<b>Total</b>			<b>\$3,326.26</b>	<b>\$3,341.29</b>	<b>\$0.00</b>	<b>\$3,341.29</b>	<b>(\$15.03)</b>
<b>478160104 / JOHNSON &amp; JOHNSON</b>							
45.00	01/03/2007	03/26/2009	\$2,370.32	\$3,003.01	\$0.00	\$3,003.01	(\$632.69)
30.00	01/21/2004	03/26/2009	\$1,580.22	\$1,558.60	\$0.00	\$1,558.60	\$21.62
<b>Total</b>			<b>\$3,950.54</b>	<b>\$4,561.61</b>	<b>\$0.00</b>	<b>\$4,561.61</b>	<b>(\$611.07)</b>
<b>577081102 / MATTEL INC</b>							
100.00	09/25/2007	03/25/2009	\$1,183.95	\$2,343.43	\$0.00	\$2,343.43	(\$1,159.48)
150.00	09/27/2007	03/25/2009	\$1,775.93	\$3,541.43	\$0.00	\$3,541.43	(\$1,765.50)
50.00	10/01/2007	03/25/2009	\$591.98	\$1,196.31	\$0.00	\$1,196.31	(\$604.33)
300.00	09/28/2007	03/28/2009	\$3,874.11	\$7,013.25	\$0.00	\$7,013.25	(\$3,339.14)
50.00	10/15/2007	03/28/2009	\$612.35	\$1,116.63	\$0.00	\$1,116.63	(\$504.28)

Footnote Reference # and Description

61 - Old on sale, 62 - Capital gain or loss allocated on 12/31 from participation in common trust funds

63 - Mark-to-Market adjustment under IRC section 1256, 64 - Miscellaneous cost adjustment to property reflect gain or loss

85 - Inherited property - Long-term holding period, 68 - Adjustment for the non-reportable amount of gain or loss attributable to accrued market discount

Report run on Oct 6, 2009 by Administrator

Version GP8.4.1.2

# Bessemer Trust

## Capital Gain & Loss

Statement for the period 10/01/08 to 09/30/09

STRAUCH, BARRY S & EVELYN (918)

Tax ID- 54-1407386

Sorted by security description, sold date

Trade date basis

Page 4 of 9 - 8G2148

Share/ par value	Date acquired	Date sold	Proceeds	Original cost basis	Adjustments	Adjusted cost basis	Gain/ loss
<b>8G2148 THE STRAUCH FOUNDATION</b>							
<b>Long term gain loss</b>							
<b>577081102 / MATTEL INC</b>							
100.00	10/15/2007	03/27/2009	\$1,219.04	\$2,233.26	\$0.00	\$2,233.26	(\$1,014.22)
100.00	10/16/2007	03/27/2009	\$1,219.03	\$2,215.73	\$0.00	\$2,215.73	(\$996.70)
100.00	03/24/2008	03/30/2009	\$1,158.75	\$2,170.69	\$0.00	\$2,170.69	(\$1,011.94)
100.00	03/20/2008	03/31/2009	\$1,180.08	\$2,120.60	\$0.00	\$2,120.60	(\$980.52)
<b>Total</b>			<b>\$12,595.22</b>	<b>\$23,951.33</b>	<b>\$0.00</b>	<b>\$23,951.33</b>	<b>(\$11,356.11)</b>
<b>580037109 / MCDERMOTT INTL INC</b>							
25.00	06/13/2007	10/08/2008	\$437.52	\$992.58	\$0.00	\$992.58	(\$555.06)
75.00	06/12/2007	10/06/2008	\$1,312.55	\$2,896.70	\$0.00	\$2,896.70	(\$1,584.15)
25.00	06/12/2007	10/07/2008	\$434.91	\$965.56	\$0.00	\$965.56	(\$530.65)
<b>Total</b>			<b>\$2,184.98</b>	<b>\$4,854.84</b>	<b>\$0.00</b>	<b>\$4,854.84</b>	<b>(\$2,669.86)</b>
<b>61166W101 / MONSANTO CO NEW COM</b>							
95.00	04/29/2004	10/06/2008	\$7,149.47	\$1,699.65	\$0.00	\$1,699.65	\$5,449.82
<b>680414208 / OLD WESTBURY MID CAP EQ FD</b>							
10,828.17	02/11/1998	10/03/2008	\$143,771.49	\$138,466.66	\$0.00	\$138,466.66	\$5,304.83
9.47	12/18/2002	10/03/2008	\$125.77	\$118.10	\$0.00	\$118.10	\$7.67
855.43	02/27/2003	10/03/2008	\$11,360.14	\$10,000.00	\$0.00	\$10,000.00	\$1,360.14
<b>Total</b>			<b>\$155,257.40</b>	<b>\$148,584.76</b>	<b>\$0.00</b>	<b>\$148,584.76</b>	<b>\$6,672.64</b>
<b>713448108 / PEPSICO INC</b>							
75.00	11/04/2004	04/22/2009	\$3,644.38	\$3,826.02	\$0.00	\$3,826.02	(\$181.64)
25.00	11/10/2004	04/22/2009	\$1,214.79	\$1,279.88	\$0.00	\$1,279.88	(\$65.09)
75.00	01/07/2005	04/22/2009	\$3,644.37	\$3,941.94	\$0.00	\$3,941.94	(\$297.57)
25.00	11/08/2004	04/23/2009	\$1,194.54	\$1,273.55	\$0.00	\$1,273.55	(\$79.01)

Footnote Reference # and Description

61 - OID on sale, 62 - Capital gain or loss allocated on 12/31 from participation in common trust funds

63 - Mark-to-Market adjustment under IRC section 1256, 64 - Miscellaneous cost adjustment to properly reflect gain or loss

65 - Inherited property - Long-term holding period, 66 - Adjustment for the non-reportable amount of gain or loss attributable to accrued market discount

Report run on Oct 6, 2009 by Administrator

Version GP8 4 1 2

# Bessemer Trust

## Capital Gain & Loss

Statement for the period 10/01/08 to 09/30/09

STRAUCH, BARRY S & EVELYN (918)

Tax ID: 54-1407386

Sorted by security description, sold date  
Trade date basis

Page 5 of 9 - 8G2148

Shares/ par value	Date acquired	Date sold	Proceeds	Original cost basis	Adjustments	Adjusted cost basis	Gain/ loss
<b>8G2148 THE STRAUCH FOUNDATION</b>							
<b>Long term gain loss</b>							
<b>713448108 / PEPSICO INC</b>							
25.00	11/09/2004	04/23/2009	\$1,194.54	\$1,272.12	\$0.00	\$1,272.12	(\$77.58)
<b>Total</b>			<b>\$10,892.62</b>	<b>\$11,593.51</b>	<b>\$0.00</b>	<b>\$11,593.51</b>	<b>(\$700.89)</b>
<b>69331C108 / PG &amp; E CORP</b>							
50.00	09/28/2004	03/26/2009	\$2,014.14	\$1,513.23	\$0.00	\$1,513.23	\$500.91
35.00	11/12/2004	03/26/2009	\$1,409.90	\$1,178.05	\$0.00	\$1,178.05	\$231.85
15.00	09/29/2004	03/26/2009	\$604.24	\$452.44	\$0.00	\$452.44	\$151.80
25.00	09/22/2004	08/15/2009	\$932.96	\$745.42	\$0.00	\$745.42	\$187.54
25.00	09/24/2004	08/15/2009	\$932.96	\$753.75	\$0.00	\$753.75	\$179.21
10.00	09/28/2004	06/15/2009	\$373.18	\$301.63	\$0.00	\$301.63	\$71.55
15.00	09/23/2004	06/15/2009	\$559.78	\$446.39	\$0.00	\$446.39	\$113.39
10.00	09/23/2004	07/14/2009	\$378.31	\$297.59	\$0.00	\$297.59	\$80.72
65.00	09/15/2004	07/14/2009	\$2,459.00	\$1,929.23	\$0.00	\$1,929.23	\$529.77
35.00	09/15/2004	07/15/2009	\$1,325.59	\$1,038.82	\$0.00	\$1,038.82	\$286.77
25.00	09/18/2004	07/15/2009	\$946.85	\$740.11	\$0.00	\$740.11	\$206.74
<b>Total</b>			<b>\$11,936.91</b>	<b>\$9,396.66</b>	<b>\$0.00</b>	<b>\$9,396.66</b>	<b>\$2,540.25</b>
<b>744320102 / PRUDENTIAL FINANCIAL</b>							
40.00	09/20/2006	11/26/2008	\$783.38	\$2,983.42	\$0.00	\$2,983.42	(\$2,200.04)
135.00	05/24/2004	11/26/2008	\$2,643.91	\$5,761.08	\$0.00	\$5,761.08	(\$3,117.17)
76.00	05/24/2004	11/28/2008	\$1,605.03	\$3,243.28	\$0.00	\$3,243.28	(\$1,638.25)
<b>Total</b>			<b>\$5,032.32</b>	<b>\$11,987.78</b>	<b>\$0.00</b>	<b>\$11,987.78</b>	<b>(\$6,955.46)</b>
<b>844741108 / SOUTHWEST AIRLINES</b>							
70.00	07/10/2007	11/20/2008	\$564.29	\$1,080.48	\$0.00	\$1,080.48	(\$496.19)

Footnote Reference # and Description

81 - OID on sale, 82 - Capital gain or loss allocated on 12/31 from participation in common trust funds

83 - Mark-to-Market adjustment under IRC section 1258, 84 - Miscellaneous cost adjustment to properly reflect gain or loss

85 - Inherited property - Long-term holding period, 86 - Adjustment for the non-reportable amount of gain or loss attributable to accrued market discount

Report run on Oct 6, 2009 by Administrator  
Version GP8 4.1.2

# Bessemer Trust

## Capital Gain & Loss

Page 6 of 9 - 8G2148

Statement for the period 10/01/08 to 09/30/09

STRAUCH, BARRY S & EVELYN (918)

Tax ID: 54-1407386

Sorted by security description, sold date

Trade date basis

Shares/ par value	Date acquired	Date sold	Proceeds	Original cost basis	Adjustments	Adjusted cost basis	Gain/ loss
<b>8G2148 THE STRAUCH FOUNDATION</b>							
<b>Long term gain loss</b>							
<b>844741108 / SOUTHWEST AIRLINES</b>							
230.00	07/05/2007	11/20/2008	\$1,919.80	\$3,520.52	\$0.00	\$3,520.52	(\$1,600.72)
70.00	07/05/2007	11/21/2008	\$562.03	\$1,071.46	\$0.00	\$1,071.46	(\$509.43)
150.00	09/17/2007	11/21/2008	\$1,204.34	\$2,209.29	\$0.00	\$2,209.29	(\$1,004.95)
30.00	09/18/2007	11/21/2008	\$240.87	\$441.38	\$0.00	\$441.38	(\$200.51)
120.00	09/18/2007	11/24/2008	\$972.88	\$1,765.54	\$0.00	\$1,765.54	(\$792.68)
<b>Total</b>			<b>\$5,484.21</b>	<b>\$10,088.67</b>	<b>\$0.00</b>	<b>\$10,088.67</b>	<b>(\$4,604.46)</b>
<b>883556102 / THERMO FISHER SCIENTIFIC</b>							
75.00	11/20/2006	08/21/2009	\$3,443.85	\$3,289.50	\$0.00	\$3,289.50	\$154.35
<b>931142103 / WAL-MART STORES INC</b>							
45.00	01/03/2007	10/17/2008	\$2,428.40	\$2,143.20	\$0.00	\$2,143.20	\$285.20
55.00	03/27/2007	10/17/2008	\$2,985.61	\$2,611.95	\$0.00	\$2,611.95	\$373.66
75.00	03/27/2007	03/25/2009	\$3,831.62	\$3,561.75	\$0.00	\$3,561.75	\$269.87
<b>Total</b>			<b>\$9,223.63</b>	<b>\$8,316.90</b>	<b>\$0.00</b>	<b>\$8,316.90</b>	<b>\$906.73</b>
<b>H27013103 / WEATHERFORD INTL LTD</b>							
100.00	03/13/2007	06/03/2009	\$1,993.70	\$2,196.53	\$0.00	\$2,196.53	(\$202.83)
<b>Total for Long term gain loss</b>			<b>\$342,835.41</b>	<b>\$312,977.68</b>	<b>\$0.00</b>	<b>\$312,977.68</b>	<b>\$29,857.73</b>
<b>Short term gain loss</b>							
<b>165167107 / CHESAPEAKE ENERGY CORP</b>							
75.00	06/17/2008	03/28/2009	\$1,426.11	\$4,761.53	\$0.00	\$4,761.53	(\$3,335.42)
75.00	05/12/2008	03/27/2009	\$1,378.39	\$4,189.49	\$0.00	\$4,189.49	(\$2,811.10)
100.00	07/29/2008	05/13/2009	\$2,044.86	\$4,697.70	\$0.00	\$4,697.70	(\$2,652.84)
25.00	11/05/2008	08/14/2009	\$588.23	\$605.56	\$0.00	\$605.56	(\$17.33)

Footnote Reference # and Description

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65 - Inherited property - Long-term holding period, 66 - Adjustment for the non-reportable amount of gain or loss attributable to accrued market discount

Report run on Oct 6, 2009 by Administrator

Version GP8.4.1.2

# Bessemer Trust

## Capital Gain & Loss

Statement for the period 10/01/08 to 09/30/09

STRAUCH, BARRY S & EVELYN (918)

Tax ID: 54-1407386

Sorted by security description, sold date

Trade date basis

Page 7 of 9 - 8G2148

Shares/ par value	Date acquired	Date sold	Proceeds	Original cost basis	Adjustments	Adjusted cost basis	Gain/ loss
<b>8G2148 THE STRAUCH FOUNDATION</b>							
<b>Short term gain loss</b>							
<b>165167107 / CHESAPEAKE ENERGY CORP</b>							
75.00	11/04/2008	08/14/2009	\$1,764.67	\$1,660.79	\$0.00	\$1,660.79	\$103.88
75.00	11/04/2008	08/17/2009	\$1,670.16	\$1,660.79	\$0.00	\$1,660.79	\$9.37
<b>Total</b>			<b>\$8,872.42</b>	<b>\$17,575.86</b>	<b>\$0.00</b>	<b>\$17,575.86</b>	<b>(\$8,703.44)</b>
<b>254687106 / DISNEY (WALT) HOLDING CO</b>							
100.00	08/01/2008	02/02/2009	\$2,029.15	\$3,013.70	\$0.00	\$3,013.70	(\$984.55)
100.00	08/01/2008	02/03/2009	\$1,998.02	\$3,013.70	\$0.00	\$3,013.70	(\$1,015.68)
<b>Total</b>			<b>\$4,027.17</b>	<b>\$6,027.40</b>	<b>\$0.00</b>	<b>\$6,027.40</b>	<b>(\$2,000.23)</b>
<b>268648102 / EMC CORP</b>							
150.00	08/22/2008	07/14/2009	\$1,924.78	\$2,363.78	\$0.00	\$2,363.78	(\$439.00)
<b>302571104 / FPL GROUP INC</b>							
75.00	02/02/2009	09/23/2009	\$4,057.87	\$3,822.46	\$0.00	\$3,822.46	\$235.41
25.00	01/20/2009	09/24/2009	\$1,348.17	\$1,253.89	\$0.00	\$1,253.89	\$94.28
25.00	12/17/2008	09/24/2009	\$1,348.17	\$1,187.34	\$0.00	\$1,187.34	\$160.83
70.00	12/17/2008	09/25/2009	\$3,804.39	\$3,324.56	\$0.00	\$3,324.56	\$479.83
<b>Total</b>			<b>\$10,558.60</b>	<b>\$9,588.25</b>	<b>\$0.00</b>	<b>\$9,588.25</b>	<b>\$970.35</b>
<b>372917104 / GENZYME CORP (GENL DIV)</b>							
50.00	06/24/2008	06/15/2009	\$2,796.10	\$3,523.52	\$0.00	\$3,523.52	(\$727.42)
25.00	06/20/2008	06/16/2009	\$1,318.30	\$1,707.20	\$0.00	\$1,707.20	(\$388.90)
50.00	06/23/2008	06/16/2009	\$2,636.61	\$3,478.30	\$0.00	\$3,478.30	(\$841.69)
25.00	06/24/2008	06/16/2009	\$1,318.30	\$1,761.76	\$0.00	\$1,761.76	(\$443.46)
25.00	10/24/2008	06/16/2009	\$1,318.30	\$1,889.97	\$0.00	\$1,889.97	(\$571.67)
<b>Total</b>			<b>\$9,387.61</b>	<b>\$12,160.75</b>	<b>\$0.00</b>	<b>\$12,160.75</b>	<b>(\$2,773.14)</b>

Footnote Reference # and Description

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65 - Inherited property - Long-term holding period, 66 - Adjustment for the non-reportable amount of gain or loss attributable to accrued market discount

Report run on Oct 6, 2009 by Administrator  
Version GP8 4.1.2

# Bessemer Trust

## Capital Gain & Loss

Statement for the period 10/01/08 to 09/30/09

STRAUCH, BARRY S & EVELYN (918)

Tax ID: 54-1407386

Sorted by security description, sold date

Trade date basis

Page 8 of 9 - 8G2148

Shares/ par value	Date acquired	Date sold	Proceeds	Original cost basis	Adjustments	Adjusted cost basis	Gain/ loss
<b>8G2148 THE STRAUCH FOUNDATION</b>							
<b>Short term gain loss</b>							
<b>441060100 / HOSPIRA INC</b>							
25.00	12/11/2007	10/17/2008	\$741.70	\$1,075.66	\$0.00	\$1,075.66	(\$333.98)
50.00	12/11/2007	10/21/2008	\$1,508.65	\$2,151.31	\$0.00	\$2,151.31	(\$642.66)
25.00	12/11/2007	10/22/2008	\$723.17	\$1,075.66	\$0.00	\$1,075.66	(\$352.49)
25.00	12/03/2007	10/22/2008	\$723.16	\$1,065.17	\$0.00	\$1,065.17	(\$342.01)
25.00	12/03/2007	10/23/2008	\$706.63	\$1,065.17	\$0.00	\$1,065.17	(\$358.54)
25.00	11/21/2007	10/23/2008	\$706.63	\$1,060.65	\$0.00	\$1,060.65	(\$354.02)
25.00	11/21/2007	10/24/2008	\$679.84	\$1,060.65	\$0.00	\$1,060.65	(\$380.81)
25.00	11/19/2007	10/27/2008	\$668.72	\$1,043.04	\$0.00	\$1,043.04	(\$374.32)
50.00	11/26/2007	10/27/2008	\$1,337.43	\$2,112.33	\$0.00	\$2,112.33	(\$774.90)
25.00	11/27/2007	10/27/2008	\$668.72	\$1,058.10	\$0.00	\$1,058.10	(\$389.38)
<b>Total</b>			<b>\$8,464.65</b>	<b>\$12,767.74</b>	<b>\$0.00</b>	<b>\$12,767.74</b>	<b>(\$4,303.09)</b>
<b>443683107 / HUDSON CITY BANCORP INC</b>							
100.00	03/13/2009	08/26/2009	\$1,305.97	\$1,043.52	\$0.00	\$1,043.52	\$262.45
75.00	03/12/2009	08/26/2009	\$979.48	\$755.67	\$0.00	\$755.67	\$223.81
25.00	03/12/2009	08/27/2009	\$320.09	\$251.89	\$0.00	\$251.89	\$68.20
50.00	03/12/2009	08/27/2009	\$640.19	\$503.78	\$0.00	\$503.78	\$136.41
<b>Total</b>			<b>\$3,245.73</b>	<b>\$2,554.86</b>	<b>\$0.00</b>	<b>\$2,554.86</b>	<b>\$690.87</b>
<b>655664100 / NORDSTROM INC</b>							
75.00	04/07/2008	11/20/2008	\$667.50	\$2,531.14	\$0.00	\$2,531.14	(\$1,863.64)
50.00	04/08/2008	11/20/2008	\$445.00	\$1,700.96	\$0.00	\$1,700.96	(\$1,255.96)
25.00	04/09/2008	11/20/2008	\$222.50	\$830.69	\$0.00	\$830.69	(\$608.19)
75.00	04/09/2008	11/21/2008	\$547.91	\$2,492.05	\$0.00	\$2,492.05	(\$1,944.14)
<b>Total</b>			<b>\$1,882.91</b>	<b>\$7,554.84</b>	<b>\$0.00</b>	<b>\$7,554.84</b>	<b>(\$5,671.93)</b>

Footnote Reference # and Description

61 - OID on sale, 62 - Capital gain or loss allocated on 12/31 from participation in common trust funds

63 - Mark-to-Market adjustment under IRC section 1256, 64 - Miscellaneous cost adjustment to properly reflect gain or loss

65 - Inherited property - Long-term holding period, 66 - Adjustment for the non-reportable amount of gain or loss attributable to accrued market discount

Report run on Oct 6, 2009 by Administrator  
Version GP8.4.1.2



# Bessemer Trust

## Capital Gain & Loss

Statement for the period 10/01/08 to 09/30/09

STRAUCH, BARRY S & EVELYN (918)

Tax ID: 54-1407386

Sorted by security description, sold date

Trade date basis

Page 9 of 9 - 8G2148

Shares/ par value	Date acquired	Date sold	Proceeds	Original cost basis	Adjustments	Adjusted cost basis	Gain/ loss
<b>8G2148 THE STRAUCH FOUNDATION</b>							
<b>Short term gain loss</b>							
<b>760975102 / RESEARCH IN MOTION LTD</b>							
25.00	07/29/2008	06/03/2009	\$2,000.79	\$2,896.63	\$0.00	\$2,896.63	(\$895.84)
<b>78482F103 / S&amp;P 500 DEP RCPTS</b>							
100.00	07/29/2008	01/14/2009	\$8,424.15	\$12,592.24	\$0.00	\$12,592.24	(\$4,168.09)
50.00	12/08/2008	01/14/2009	\$4,212.07	\$4,563.17	\$0.00	\$4,563.17	(\$351.10)
25.00	12/08/2008	01/15/2009	\$2,097.93	\$2,281.58	\$0.00	\$2,281.58	(\$183.65)
<b>Total</b>			<b>\$14,734.15</b>	<b>\$19,436.99</b>	<b>\$0.00</b>	<b>\$19,436.99</b>	<b>(\$4,702.84)</b>
<b>855030102 / STAPLES INC</b>							
100.00	08/05/2008	06/03/2009	\$2,115.50	\$2,433.34	\$0.00	\$2,433.34	(\$317.84)
<b>887914103 / SUNTRUST BANKS INC</b>							
50.00	11/04/2008	01/20/2009	\$825.13	\$2,106.42	\$0.00	\$2,106.42	(\$1,281.29)
25.00	11/05/2008	01/20/2009	\$412.57	\$1,029.02	\$0.00	\$1,029.02	(\$616.45)
50.00	11/05/2008	01/21/2009	\$775.53	\$2,058.04	\$0.00	\$2,058.04	(\$1,282.51)
75.00	12/08/2008	01/21/2009	\$1,163.29	\$2,480.36	\$0.00	\$2,480.36	(\$1,317.07)
<b>Total</b>			<b>\$3,176.52</b>	<b>\$7,673.84</b>	<b>\$0.00</b>	<b>\$7,673.84</b>	<b>(\$4,497.32)</b>
<b>Total for Short term gain loss</b>			<b>\$70,390.83</b>	<b>\$103,034.28</b>	<b>\$0.00</b>	<b>\$103,034.28</b>	<b>(\$32,643.45)</b>
<b>Total 8G2148</b>			<b>\$413,226.24</b>	<b>\$416,011.96</b>	<b>\$0.00</b>	<b>\$416,011.96</b>	<b>(\$2,785.72)</b>

Footnote Reference # and Description

61 - OID on sale, 62 - Capital gain or loss allocated on 12/31 from participation in common trust funds

63 - Mark-to-Market adjustment under IRC section 1258, 64 - Miscellaneous cost adjustment to properly reflect gain or loss

65 - Inherited property - Long-term holding period, 66 - Adjustment for the non-reportable amount of gain or loss attributable to accrued market discount

Report run on Oct 8, 2009 by Administrator  
Version GP8 4.1.2