Form 990-PF

Department of the Treasury
Internal Revenue Service

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 11/1/2008 **, and ending** 10/31/2009

G Check all that apply: ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation: ALZHEIMERS RESEARCH ASSOCIATION, INC

Number and street (or P O box number if mail is not delivered to street address): c/o L. WOLLIN 866 UN PLAZA — Room/suite: 508

City or town, state, and ZIP code: NEW YORK NY 10017

A Employer identification number: 23-7438025

B Telephone number (see page 10 of the instructions): 212-785-2610

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, col (c), line 16)* ▶ $ 207,278

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 page 11 of the instructions))

Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue					
1	Contributions, gifts, grants, etc , received (attach schedule)	21,514			
2	Check ▶ ☐ if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	0	0		
4	Dividends and interest from securities	5,151	5,151		
5 a	Gross rents		0		
b	Net rental income or (loss) 0				
6 a	Net gain or (loss) from sale of assets not on line 10	-7,948			
b	Gross sales price for all assets on line 6a 0				
7	Capital gain net income (from Part IV, line 2)		0		
8	Net short-term capital gain			0	
9	Income modifications				
10 a	Gross sales less returns and allowances 0				
b	Less Cost of goods sold 0				
c	Gross profit or (loss) (attach schedule)	0			
11	Other income (attach schedule)	0	0	0	
12	**Total.** Add lines 1 through 11	18,717	5,151	0	
Operating and Administrative Expenses					
13	Compensation of officers, directors, trustees, etc	0			
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16 a	Legal fees (attach schedule)	0	0	0	0
b	Accounting fees (attach schedule)	0	0	0	0
c	Other professional fees (attach schedule)	3,987	500	0	0
17	Interest				
18	Taxes (attach schedule) (see page 14 of the instructions)	86	0	0	0
19	Depreciation (attach schedule) and depletion	0	0	0	
20	Occupancy	2,500			
21	Travel, conferences, and meetings	4,010			4,010
22	Printing and publications				
23	Other expenses (attach schedule)	9,056	0	0	7,736
24	**Total operating and administrative expenses.** Add lines 13 through 23	19,639	500	0	11,746
25	Contributions, gifts, grants paid	25,932			25,932
26	**Total expenses and disbursements.** Add lines 24 and 25	45,571	500	0	37,678
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	-26,854			
b	**Net investment income** (if negative, enter -0-)		4,651		
c	**Adjusted net income** (if negative, enter -0-)			0	

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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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	21,005		
	2 Savings and temporary cash investments	128,277	85,118	85,118
	3 Accounts receivable ▶ 0			
	Less: allowance for doubtful accounts ▶ 0	0	0	0
	4 Pledges receivable ▶ 0			
	Less: allowance for doubtful accounts ▶ 0	0	0	0
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)	0	0	0
	7 Other notes and loans receivable (attach schedule) ▶ 0			
	Less allowance for doubtful accounts ▶ 0	0	0	0
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10 a Investments—U S and state government obligations (attach schedule)	0	20,000	20,000
	b Investments—corporate stock (attach schedule)	79,083	99,643	96,425
	c Investments—corporate bonds (attach schedule)	0	0	0
	11 Investments—land, buildings, and equipment basis ▶ 0			
	Less accumulated depreciation (attach schedule) ▶ 0	0	0	0
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	0	0	0
	14 Land, buildings, and equipment: basis ▶ 0			
	Less accumulated depreciation (attach schedule) ▶ 0	0	0	0
	15 Other assets (describe ▶)	5,735	5,735	5,735
	16 **Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	234,100	210,496	207,278
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue		3,250	
	20 Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21 Mortgages and other notes payable (attach schedule)	0	0	
	22 Other liabilities (describe ▶)	0	0	
	23 **Total liabilities** (add lines 17 through 22)	0	3,250	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	234,100	207,246	
	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** (see page 17 of the instructions)	234,100	207,246	
	31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	234,100	210,496	

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	234,100
2	Enter amount from Part I, line 27a	2	-26,854
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	207,246
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	207,246

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	SCHEDULE ATTACHED - ST	P	VARIOUS	10/31/2009
b				
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	84,311	0	92,259	-7,948
b	0	0	0	0
c	0	0	0	0
d	0	0	0	0
e	0	0	0	0

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a	0	0	0	-7,948
b	0	0	0	0
c	0	0	0	0
d	0	0	0	0
e	0	0	0	0

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	-7,948
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) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	3	0

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 page 18 of 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))
2007	9,493	143,374	0.066211
2006	16,195	118,628	0.136519
2005	6,982	100,769	0 069287
2004	5,480	98,988	0.055360
2003	10,715	106,721	0.100402

2	**Total** of line 1, column (d)	2	0.427779
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	0 085556
4	Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	183,294
5	Multiply line 4 by line 3	5	15,682
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	47
7	Add lines 5 and 6	7	15,729
8	Enter qualifying distributions from Part XII, line 4	8	37,678

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 on page 18.

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

1 a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ 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 . ▶ [X] and enter 1% of Part I, line 27b	1	47
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	47
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	47
6	Credits/Payments.		
a	2008 estimated tax payments and 2007 overpayment credited to 2008 — 6a: 0		
b	Exempt foreign organizations—tax withheld at source — 6b:		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 100		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments Add lines 6a through 6d	7	100
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	0
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	53
11	Enter the amount of line 10 to be **Credited to 2009 estimated tax** ▶ 53 **Refunded** ▶	11	0

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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ______ **(2)** On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		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? *If "Yes," attach a conformed copy of the changes*	3		X
4 a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	N/A	X
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		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?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8 a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ DE			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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 page 20 of the 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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ LONNIE WOLLIN Telephone no ▶ 212-785-2610

Located at ▶ ZIP+4 ▶ 07632

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

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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)? ☐ Yes ☒ 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) ☐ Yes ☒ No			
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 page 20 of the instructions)?	1b	N/A	X
	Organizations relying on a current notice regarding disaster assistance check here ▶☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2008?	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 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? ☐ Yes ☒ No			
	If "Yes," list the years ▶ 20_____, 20_____, 20_____, 20_____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions)	2b	N/A	X
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20_____, 20_____, 20_____, 20_____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
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)*	3b	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 2008?	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 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the 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 page 22 of the 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? ☐ 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 (No)

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**

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 page 22 of the 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
SCHEDULE ATTACHED	.00	0	0	0
	.00	0	0	0
	00	0	0	0
	.00	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the 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	00	0	0	0
	00	0	0	0
	.00	0	0	0
	.00	0	0	0
	.00	0	0	0

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 (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		0
		0
		0
		0
		0

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	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions 3	0
Total. Add lines 1 through 3 ▶	0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	86,960
b	Average of monthly cash balances	1b	99,125
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	186,085
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	186,085
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	2,791
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	183,294
6	**Minimum investment return.** Enter 5% of line 5	6	9,165

Part XI Distributable Amount (see page 25 of the 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	9,165
2a	Tax on investment income for 2008 from Part VI, line 5	2a	47		
b	Income tax for 2008 (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	47
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	9,118
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	9,118
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	9,118

Part XII Qualifying Distributions (see page 25 of the 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	37,678
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	37,678
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 page 26 of the instructions)	5	47
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	37,631

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 page 26 of the instructions)

			(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1	Distributable amount for 2008 from Part XI, line 7					9,118
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	5,391				
b	From 2004	582				
c	From 2005	1,972				
d	From 2006	10,312				
e	From 2007	2,488				
f	Total of lines 3a through e		20,745			
4	Qualifying distributions for 2008 from Part XII, line 4: ▶ $ 37,678					
a	Applied to 2007, but not more than line 2a				0	
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)			0		
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)		0			
d	Applied to 2008 distributable amount					9,118
e	Remaining amount distributed out of corpus		28,560			
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		49,305			
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					
d	Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions			0		
e	Undistributed income for 2007. Subtract line 4a from line 2a Taxable amount—see page 27 of the 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 page 27 of the instructions)					
8	Excess distributions carryover from 2003 not applied on line 5 or line 7 (see page 27 of the instructions)		5,391			
9	**Excess distributions carryover to 2009.** Subtract lines 7 and 8 from line 6a		43,914			
10	Analysis of line 9.					
a	Excess from 2004	582				
b	Excess from 2005	1,972				
c	Excess from 2006	10,312				
d	Excess from 2007	2,488				
e	Excess from 2008	28,560				

Part XIV Private Operating Foundations (see page 27 of the 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 2008, enter the date of the ruling ▶ N/A

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	Prior 3 years			(e) Total
	(a) 2008	(b) 2007	(c) 2006	(d) 2005	
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	0	0	0	0	0
b 85% of line 2a	0	0	0	0	0
c Qualifying distributions from Part XII, line 4 for each year listed	0	0	0	0	0
d Amounts included in line 2c not used directly for active conduct of exempt activities					0
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	0	0	0	0	0
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	0	0	0	0	0
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)(iii)					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 page 27 of the 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 page 28 of the 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 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*				
SCHEDULE ATTACHED				
	N/A	PUBLIC		25,932
				0
				0
				0
				0
				0
				0
				0
				0
				0
				0
				0
				0
				0
				0
				0
Total			▶ 3a	25,932
b *Approved for future payment*				
				0
				0
				0
				0
				0
				0
				0
				0
				0
Total			▶ 3b	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a		0		0	0
b		0		0	0
c		0		0	0
d		0		0	0
e		0		0	0
f		0		0	0
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory				0	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a		0		0	0
b		0		0	0
c		0		0	0
d		0		0	0
e		0		0	0
12 Subtotal Add columns (b), (d), and (e)		0		0	0

13 **Total.** Add line 12, columns (b), (d), and (e) 13 0

(See worksheet in line 13 instructions on page 28 to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash	1a(1)		X
(2) Other assets	1a(2)		X
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
(3) Rental of facilities, equipment, or other assets	1b(3)		X
(4) Reimbursement arrangements	1b(4)		X
(5) Loans or loan guarantees	1b(5)		X
(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
	0		
	0		
	0		
	0		
	0		
	0		
	0		
	0		
	0		
	0		
	0		
	0		
	0		
	0		
	0		
	0		

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

Signature of officer or trustee — Louise Walker — Date 6/22/10 — Title TREASURER

Paid Preparer's Use Only

Preparer's signature	Date	Check if self-employed ☐	Preparer's identifying number (see Signature on page 30 of the instructions)
Firm's name (or yours if self-employed), address, and ZIP code		EIN	Phone no

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.

OMB No 1545-0047

2008

Name of the organization	Employer identification number
ALZHEIMERS RESEARCH ASSOCIATION, INC.	23-7438025

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 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).

Name of organization	Employer identification number
ALZHEIMERS RESEARCH ASSOCIATION, INC.	23-7438025

Part I **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	DAVID SILVERSTEIN MANHASSETT NY Foreign State or Province Foreign Country	$ 7,500	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
2	Foreign State or Province Foreign Country.	$ 0	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
3	Foreign State or Province Foreign Country	$ 0	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
4	Foreign State or Province Foreign Country	$ 0	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
5	Foreign State or Province Foreign Country	$ 0	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
6	Foreign State or Province Foreign Country	$ 0	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)

Line 16c (990-PF) - Other Fees

	Name of organization or person providing service	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
		3,987	500	0	0
1	BOOKKEEPING	3,487			
2	INVESTMENT ADVISORY	500	500		
3					
4					
5					
6					
7					
8					
9					
10					

Line 18 (990-PF) - Taxes

	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
		86	0	0	0
1	Real estate tax not included in line 20				
2	Tax on investment income	61			
3	State Franchise Tax	25			
4					
5					
6					
7					
8					
9					
10					

Line 23 (990-PF) - Other Expenses

	Description	Revenue and expenses per books	Net investment income	Adjusted net income	Disbursements for charitable purposes
		9,056	0	0	7,736
1	Amortization. See attached statement	0	0	0	0
2	SECRETARIAL SERVICES	450			
3	PARKING	24			
4	ADVERTISING	4,500			4,500
5	LODGING	3,236			3,236
6	DELAWARE REP FEE	260			
7	POSTAGE	208			
8	OFFICE EXPENSE				
9	EQUIPMENT LEASE	377			
10	BANK CHARGE	1			
11					
12					
13					

Part II, Line 15 (990-PF) - Other Assets

	Description	(a) Beginning balance	(b) Ending balance	(c) Fair market value
		5,735	5,735	5,735
1		5,735	5,735	5,735
2				
3				
4				
5				
6				
7				
8				
9				
10				

SEC Positions AS OF 10/31/09				
	PART II line 10b			
			Column (b)	Column (c)
Shares	Descriptions		Cost	FMV
200	AT&T		5,019	5134
300	AMERICAN ELECTRIC POWER CO INC		9,009	9066
200	Amylin Pharmaceuticals		8,333	2208
100	Cameron International		6,886	7394
100	Cameron International		0	
200	Corning Inc		4,725	2922
100	Fedex		10,942	7269
100	General Electric		3,520	1426
200	MSFT		9,231	5546
100	PEP		5,205	6055
3	PUT SPY OPTION NOV -09 $99		585	384
300	S&P		28,050	31068
100	TEVA		4,666	5048
100	Texas Instruments		3,472	2345
			99,643	85,865

SEC Positions AS OF 10/31/08				
	PART II line 10b		Column (a)	
Shares	Descriptions		Cost	
200	AT&T		5,019	
300	AMERICAN ELECTRIC POWER CO INC		9,009	
200	Amylin Pharmaceuticals		8,333	
100	Cameron International		6,886	
100	Cameron International		0	
200	Corning Inc		4,725	
200	DOW CHEMICAL CO.		4,910	
100	Fedex		10,942	
200	MSFT		9,231	
100	PEP		5,205	
200	SOUTHERN CO		6,685	
100	TEVA		4,666	
100	Texas Instruments		3,472	
			79,083	

		PART IV, line 1a				
		SHORT TERM				**Gain or**
Trade Date	**Security**	**Transaction Description**	**Quantity**	**Sales Price**	**Cost Basis**	**(Loss)**
08/18/09	AEPBZ	3 AEP FEB-10 $32 50 CALLS (	-3	360		
05/19/09	AEPEZ	3 AEP MAY-09 $32 50 CALLS (	3		0	
08/18/09	AEPHF	3 AEP AUG-09 $30 CALLS (A	3		(240)	
03/16/09	AEPHF	3 AEP AUG-09 $30 CALLS (A	-3	315		
11/28/2008	DD	300 E I DU PONT DE NEMOURS & CO	300		(9,770)	
04/16/09	DD	E I DU PONT DE NEMOURS & CO	-100	2,706		
10/19/09	DD	E I DU PONT DE NEMOURS & CO OPT	-200	6,480		
01/07/09	DDDF	CALL DUPONT APR 030 ****EXP 04/	3		0	
11/21/08	DDDF	3 DD APR-09 $30 CALLS (D	-3	450		
10/21/08	DOW	DOW CHEMICAL CO	200		(4,910)	
09/21/09	DOW	DOW CHEMICAL CO. OPTION A	-200	4,180		
09/21/09	DOWIY	2 DOW SEP-09 $21 CALLS (	2		0	
05/11/09	DOWIY	2 DOW SEP-09 $21 CALLS (	-2	250		
03/30/09	DXTDF	CALL DUPONT APR 030 ****EXP 04/	-3	0		
04/21/09	DXTDF	3 DD APR-09 $30 CALLS (D	3	0		
04/21/09	DXTJZ	3 DD OCT-09 $32.50 CALLS (I	-3	405		
10/19/09	DXTJZ	3 DD OCT-09 $32.50 CALLS (I	3	0		
10/28/08	SO	SOUTHERN CO	200		(6,685)	
08/24/09	SO	SOUTHERN CO OPTION ASS	-200	6,180		
08/24/09	SOHS	2 SO AUG-09 $31 CALLS (S	2		0	
04/28/09	SOHS	2 SO AUG-09 $31 CALLS (S	-2	220		
11/07/08	SPY	STANDARD & POORS DEPOSITORY R	400		(42,858)	
11/07/08	SPY	STANDARD & POORS DEPOSITORY R	-400	37,978		
01/06/09	SWGAM	3 SPY JAN-09 $91 CALLS (S	3		(1,155)	
11/13/08	SWGAM	3 SPY JAN-09 $91 CALLS (S	-3	1,305		
01/23/09	SWGCL	3 SPY MAR-09 $90 CALLS (S	-3	705		
01/15/09	SWGCV	3 SPY MAR-09 $100 CALLS (	3		(210)	
11/25/08	SWGKQ	3 SPY NOV-08 $95 CALLS (S	3		0	
11/10/08	SWGKQ	3 SPY NOV-08 $95 CALLS (S	-3	708		
11/13/08	SWGKR	3 SPY NOV-08 $96 CALLS (S	3		(138)	
11/06/08	SWGKR	3 SPY NOV-08 $96 CALLS (S	-3	621		
11/13/08	SWGKS	3 SPY NOV-08 $97 CALLS (S	3		(108)	
11/06/08	SWGKS	3 SPY NOV-08 $97 CALLS (S	-3	750		
11/12/08	SWGKY	3 SPY NOV-08 $103 CALLS (	3		(39)	
11/04/08	SWGKY	3 SPY NOV-08 $103 CALLS (	-3	678		
06/01/09	SWGSN	5 SPY JUL-09 $92 PUTS (SV	5		(1,370)	
06/26/09	SWGSN	2 SPY JUL-09 $92 PUTS (SV	-2	470		
07/06/09	SWGSN	3 SPY JUL-09 $92 PUTS (SV	-3	1,125		
08/17/09	SWGUS	5 SPY SEP-09 $97 PUTS (S	5		(1,279)	
08/03/09	SWGUS	5 SPY SEP-09 $97 PUTS (S	-5	1,161		
08/20/09	SWGVU	5 SPY OCT-09 $99 PUTS (S	5		(1,625)	
09/25/09	SWGVU	5 SPY OCT-09 $99 PUTS (S	5		(330)	
09/24/09	SWGVU	5 SPY OCT-09 $99 PUTS (S	-5	330		
11/13/08	SWGWQ	3 SPY NOV-08 $95 PUTS (S	3		(2,325)	
12/01/08	SZCAG	1 SPY JAN-09 $85 CALL (SZ	1		(665)	
01/06/09	SZCAG	2 SPY JAN-09 $85 CALLS (S	2		(1,780)	
11/20/08	SZCAG	3 SPY JAN-09 $85 CALLS (S	-3	1,515		
05/04/09	SZCED	3 SPY MAY-09 $82 CALLS (S	3		(2,550)	

Trade Date	Security	Transaction Description	Quantity	Sales Price	Cost Basis	(Loss)
02/24/09	SZCED	3 SPY MAY-09 $82 CALLS (S	-3	855		
03/31/09	SZCEJ	3 SPY MAY-09 $88 CALLS (S	3		(618)	
05/14/09	SZCEJ	3 SPY MAY-09 $88 CALLS (S	3		(447)	
03/27/09	SZCEJ	3 SPY MAY-09 $88 CALLS (S	-3	618		
03/31/09	SZCEJ	3 SPY MAY-09 $88 CALLS (S	-3	618		
05/04/09	SZCEX	3 SPY MAY-09 $76 CALLS (S	3		(4,305)	
03/03/09	SZCEX	3 SPY MAY-09 $76 CALLS (S	-3	795		
12/31/08	SZCNG	3 SPY FEB-09 $85 PUTS (S	3		(960)	
01/28/09	SZCNG	3 SPY FEB-09 $85 PUTS (S	-3	708		
01/28/09	SZCOB	3 SPY MAR-09 $80 PUTS (S	3		(798)	
01/15/09	SZCOB	3 SPY MAR-09 $80 PUTS (S	-3	1,680		
04/21/09	SZCQE	3 SPY MAY-09 $83 PUTS (S	3		(876)	
04/17/09	SZCQE	3 SPY MAY-09 $83 PUTS (S	-3	504		
05/04/09	SZCRI	3 SPY JUN-09 $87 PUTS (S	3		(897)	
05/29/09	SZCRI	3 SPY JUN-09 $87 PUTS (S	-3	363		
03/12/09	SZCRR	3 SPY JUN-09 $70 PUTS (S	3		(1,170)	
04/14/09	SZCRR	3 SPY JUN-09 $70 PUTS (S	-3	315		
06/16/09	SZCSJ	5 SPY JUL-09 $88 PUTS (SZ	5		(820)	
07/06/09	SZCSJ	2 SPY JUL-09 $88 PUTS (SZ	2		(306)	
07/14/09	SZCSJ	3 SPY JUL-09 $88 PUTS (SZ	3		(90)	
06/15/09	SZCSJ	5 SPY JUL-09 $88 PUTS (SZ	-5	820		
06/16/09	SZCSJ	5 SPY JUL-09 $88 PUTS (SZ	-5	820		
12/03/08	SZCXB	3 SPY DEC-08 $80 PUTS (S	3		(665)	
12/12/08	SZCXB	3 SPY DEC-08 $80 PUTS (S	3		(264)	
11/26/08	SZCXB	3 SPY DEC-08 $80 PUTS (S	-3	665		
12/03/08	SZCXB	3 SPY DEC-08 $80 PUTS (S	-3	690		
11/26/08	SZCXG	3 SPY DEC-08 $85 PUTS (S	3		(1,182)	
12/12/08	SZCXG	3 SPY DEC-08 $85 PUTS (S	-3	684		
10/26/09	TTWAF	2 T JAN-10 $30 CALLS (TT	2		(14)	
05/11/09	TTWAF	CALL AT&T INC JAN 030 ****EXP 01/1	-2	0		
09/17/09	UNEJP	3 UNG OCT-09 $16 CALLS (U	3		(30)	
06/26/09	UNEJP	3 UNG OCT-09 $16 CALLS (U	-3	453		
09/17/09	UNYVN	3 UNG OCT-09 $14 PUTS (U	3		(780)	
06/19/09	UNYVN	3 UNG OCT-09 $14 PUTS (U	-3	540		
05/11/09	WFEAF	CALL AT&T INC JAN 030 ****LONG TE	2		0	
03/16/09	WFEAF	2 T JAN-10 $30 CALLS (WF	-2	240		
03/05/09	WGEMG	1 GE JAN-10 $35 PUT (WG	1	0		
07/13/09	WGEMG	PUT GENERAL ELEC JAN 035 ****LONG	1	0		
08/20/09	5	SPY OCT-09 $99 PUTS (SWGVU)		1,625		
11/04/08	3	SPY NOV-08 $95 PUTS (SWGWQ)		582		
10/16/09	3	SPY DEC-09 $95 PUTS (SWGXB)		915		
02/24/09	3	AEP MAY-09 $30 PUTS (AEPQF)		930		
				84,311	(92,259)	(7,948)

PART VIII line 1a	TITLE	TITLE	COMPENSATION	BENEFITS	EXPENSE ACCT
GARY WOLLIN	DIRECTOR	PRES P/T	0	0	0
SAN FRANCISCO, CA					
ILANA WILENSKY	DIRECTOR	VP P/T	0	0	0
ATLANTA, GA					
ROBERT WOLLIN	DIRECTOR	VP P/T			
NEW YORK, NY					
LONNIE WOLLIN	DIRECTOR	SECY P/T	0	0	0
866 U.N. PLAZA SUITE 508					
NEW YORK, NY 10017					

PART XV 3a			Individual	Recipient		
Name of Charity	City	State	as Recipient	Status	Purpose	Amount
ALZHEIMER'S ASSOCIATION	Chicago	IL	N/A	Public Charity	Educational	16,375
AMERICAN INSTITUTE FOR CANCER RESEARCH	NY	NY	N/A	Public Charity	Educational	18
CAMBODIA'S HOPE	NY	NY	N/A	Public Charity	Charitable	200
CANAVAN FOUNDATION	New York	NY	N/A	Public Charity	Educational	1,000
ENGLEWOOD CLIFFS FIRE DEPARTMENT	Englewood Cliffs	NJ	N/A	Public Charity	Charitable	50
INTERNATIONAL LONGEVITY CENTER	NY	NY	N/A	Public Charity	Educational	200
Joslyn Senior Center	Palm Springs	CA	N/A	Public Charity	Charitable	100
PARKINSON FOUNDATION	Newark	NJ	N/A	Public Charity	Educational	50
PEARSON LAKES ART CENTER	Okoboji	UT	N/A	Public Charity	Educational	1,500
SALT LAKE POLICE ASSOCIATION	Salt Lake City	UT	N/A	Public Charity	Charitable	25
SALT LAKE VALLEY FIREFIGHTER ASSOCIATION	Salt Lake City	UT	N/A	Public Charity	Charitable	50
Silberstein Alzheimer's Institute	NY	NY	N/A	Public Charity	Charitable	500
TEMPLE B'NAI ISRAEL	HEWLETT	NY	N/A	Public Charity	Religious	600
Temple Shaaray Tefila	NY	NY	N/A	Public Charity	Religious	500
Temple Sinai	Tenafly	NJ	N/A	Public Charity	Religious	36
The Arnold P Gold Foundation, inc.	Englewood Cliffs	NJ	N/A	Public Charity	Educational	50
The Israel Project	WASH	DC	N/A	Public Charity	Educational	1,800
UJA of Northern New Jersey	PARAMUS	NJ	N/A	Public Charity	Charitable	540
WNET	NY	NY	N/A	Public Charity	Educational	408
ALZHEIMER'S ASSOCIATION	Salt Lake City	UT	N/A	Public Charity	Educational	500
J SISTER INTERNATIONAL	BOSTON	MA	N/A	Public Charity	Charitable	78
AVON WALK FOR BREAST CANCER	Rye	NY	N/A	Public Charity	Educational	100
MARCH OF DIMES	White Plains	NT	N/A	Public Charity	Charitable	100
GEORGIA AQUARIUM	ATLANTA	GA	N/A	Public Charity	Educational	178
FIRST GIVING	NY	NY	N/A	Public Charity	Charitable	50
HABITAT FOR HUMANITY	WASH	DC	N/A	Public Charity	Charitable	50
NATIONAL MUSEUM	WASH	DC	N/A	Public Charity	Educational	36
ROTARY CLUB FOUNDATION	NY	NY	N/A	Public Charity	Educational	270
GERARDI FDN 4 ALZHEIMERS	NY	NY	N/A	Public Charity	Educational	500
UTAH FRATERNAL ORDER OF POLICE	Salt Lake City	UT	N/A	Public Charity	Charitable	18
VOLUNTEER AMBUL. OF ENGLEWOOD CLIFFS	Englewood Cliffs	NJ	N/A	Public Charity	Charitable	50
						25,932

Form **8868**
(Rev April 2009)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.

OMB No 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box . . . . . ▶ [X]
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Part I **Automatic 3-Month Extension of Time.** Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension—check this box and complete Part I only . . . . ▶ [ ]

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Electronic Filing (*e-file*). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit *www irs.gov/efile* and click on *e-file for Charities & Nonprofits.*

Type or print	Name of Exempt Organization	Employer identification number
	ALZHEIMERS RESEARCH ASSOCIATION, INC	23-7438025
File by the due date for filing your return See instructions	Number, street, and room or suite no. If a P O box, see instructions c/o L. WOLLIN 866 UN PLAZA, Room No. 508	
	City, town or post office, state, and ZIP code For a foreign address, see instructions NEW YORK NY 10017	

Check type of return to be filed (file a separate application for each return):

[ ] Form 990	[ ] Form 990-T (corporation)	[ ] Form 4720
[ ] Form 990-BL	[ ] Form 990-T (sec 401(a) or 408(a) trust)	[ ] Form 5227
[ ] Form 990-EZ	[ ] Form 990-T (trust other than above)	[ ] Form 6069
[X] Form 990-PF	[ ] Form 1041-A	[ ] Form 8870

- The books are in the care of ▶ LONNIE WOLLIN 07632

Telephone No. ▶ 212-785-2610 FAX No ▶

- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ________. If this is for the whole group, check this box . . . . . ▶ [ ] If it is for part of the group, check this box. . . . ▶ [ ] and attach a list with the names and EINs of all members the extension will cover

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 6/15/2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
▶ [ ] calendar year ____ or
▶ [X] tax year beginning 11/1/2008, and ending 10/31/2009.

2 If this tax year is for less than 12 months, check reason. [ ] Initial return [ ] Final return [ ] Change in accounting period

3 a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	$ 100
b	If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	$
c	**Balance Due.** Subtract line 3b from line 3a Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	$ 100

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** and check this box . . . . ▶ [X]

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** (on page 1)

Part II **Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Type or print	Name of Exempt Organization ALZHEIMERS RESEARCH ASSOCIATION, INC		**Employer identification number** 23-7438025
File by the extended due date for filing the return See instructions	Number, street, and room or suite no If a P O box, see instructions c/o L. WOLLIN 866 UN PLAZA, Room No. 508		For IRS use only
	City, town or post office, state, and ZIP code For a foreign address, see instructions NEW YORK NY 10017		

Check type of return to be filed (File a separate application for each return)

[ ] Form 990	[X] Form 990-PF	[ ] Form 1041-A	[ ] Form 6069
[ ] Form 990-BL	[ ] Form 990-T (sec 401(a) or 408(a) trust)	[ ] Form 4720	[ ] Form 8870
[ ] Form 990-EZ	[ ] Form 990-T (trust other than above)	[ ] Form 5227	

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

- The books are in the care of ▶ LONNIE WOLLIN 07632
  Telephone No. ▶ 212-785-2610 FAX No. ▶
- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ If this is for the whole group, check this box . . . . ▶ [ ] If it is for part of the group, check this box . ▶ [ ] and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until 9/15/2010 .

5 For calendar year ________ , or other tax year beginning 11/1/2008 , and ending 10/31/2009

6 If this tax year is for less than 12 months, check reason. [ ] Initial return [ ] Final return [ ] Change in accounting period

7 State in detail why you need the extension More time is requested to acquire all information needed to complete and file an accurate return.

8 a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	**8a**	$ 47
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	**8b**	$ 100
c	**Balance Due.** Subtract line 8b from line 8a Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	**8c**	$ 0

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature ▶ Title ▶ TREASURER Date ▶