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Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

2008

Department of the Treasury
Internal Revenue Service

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2008, or tax year beginning Dec 1, 2008, and ending Nov 30, 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 MURRAY C. AND INA C. PITT CHARITABLE TRUST		A Employer identification number 38-3268352
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 2000 TOWN CENTER 1350		B Telephone number (see the instructions) (248) 353-7290
	City or town State ZIP code SOUTHFIELD MI 48075		C If exemption application is pending, check here <input type="checkbox"/>
			D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, column (c), line 16) \$ 1,293,834.		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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)				
	2 <input type="checkbox"/> if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	4,490.	4,490.		
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit/(loss) (att sch)					
11 Other income (attach schedule)					
SECTION 72 ANNUITY INCOME		103,901.	103,901.		
12 Total. Add lines 1 through 11		108,391.	108,391.		
ADMINISTRATIVE AND OPERATING EXPENSES	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch)	700.	350.		350.
	c Other prof fees (attach sch)				
	17 Interest				
	18 Taxes (attach schedule)	26,192.			
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	PREMIUM EXPENSE		137,820.		
24 Total operating and administrative expenses. Add lines 13 through 23		164,712.	350.		350.
25 Contributions, gifts, grants paid		608,708.			608,708.
26 Total expenses and disbursements. Add lines 24 and 25		773,420.	350.		609,058.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-665,029.			
b Net investment income (if negative, enter -0-)			108,041.		
c Adjusted net income (if negative, enter -0-)					

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

		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
ASSETS	1 Cash — non-interest-bearing	1,230,965.	833,312.	833,312.
	2 Savings and temporary cash investments			
	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) ..			
	c Investments — corporate bonds (attach schedule) ..			
	11 Investments — land, buildings, and equipment: basis			
Less: accumulated depreciation (attach schedule)				
12 Investments — mortgage loans				
13 Investments — other (attach schedule) L-13 Stmt	727,898.	460,522.	460,522.	
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation (attach schedule)				
15 Other assets (describe				
16 Total assets (to be completed by all filers — see instructions. Also, see page 1, item I) ..	1,958,863.	1,293,834.	1,293,834.	
LIABILITIES	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 Total liabilities (add lines 17 through 22) ..			
NET FUND ASSETS OR BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds ..	1,838,806.	1,293,834.	
	28 Paid-in or capital surplus, or land, building, and equipment fund ..			
	29 Retained earnings, accumulated income, endowment, or other funds ..	120,057.		
	30 Total net assets or fund balances (see the instructions) ..	1,958,863.	1,293,834.	
	31 Total liabilities and net assets/fund balances (see the instructions) ..	1,958,863.	1,293,834.	

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	1,958,863.
2 Enter amount from Part I, line 27a ..	2	-665,029.
3 Other increases not included in line 2 (itemize) .. <u>STOCK CONTRIBUTED</u>	3	
4 Add lines 1, 2, and 3 ..	4	1,293,834.
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	1,293,834.

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)
1 a				
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			
b			
c			
d			
e			

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

(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	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a			
b			
c			
d			
e			

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

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 the instructions). If (loss), enter -0-
in Part I, line 8

3

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	899,396.	2,351,232.	0.382521
2006	294,639.	2,076,997.	0.141858
2005	642,623.	1,871,123.	0.343442
2004	551,008.	1,251,144.	0.440403
2003	344,846.	1,082,638.	0.318524

2 Total of line 1, column (d)

2

1.626748

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

0.325350

4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5

4

1,447,481.

5 Multiply line 4 by line 3

5

470,938.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

1,080.

7 Add lines 5 and 6

7

472,018.

8 Enter qualifying distributions from Part XII, line 4

8

609,058.

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 1,080.
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 1,080.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4 0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5 1,080.
6 Credits/Payments:		
a 2008 estimated tax pmts and 2007 overpayment credited to 2008	6a 20,000.	
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 20,000.	
8 Enter any penalty 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	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10 18,920.	
11 Enter the amount of line 10 to be: Credited to 2009 estimated tax 1,080. Refunded	11 17,840.	

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)?		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?		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.		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		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 Form 990-T for this year?		X
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T.		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? If 'Yes,' complete Part II, column (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions)		
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	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)? If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses.		X

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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)(3)? 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?	13	X	
Website address <u>N/A</u>				
14	The books are in care of <u>CARLEEN F. LUNSFORD</u> Telephone no <u>(248) 353-7290</u>			
Located at <u>2000 TOWN CENTER, STE 1350, SOUTHFIELD, MI</u> ZIP + 4 <u>48075</u>				
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	<input type="checkbox"/> <u>15</u>		

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?	<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 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"/>	
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?		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?	<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 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 the instructions.)		
c 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>		
3a 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 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.)		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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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

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

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 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
MURRAY C. PITT 2000 TOWN CENTER, STE 1350 SOUTHFIELD MI 48075	PRESIDENT 2.00	0.	0.	0.
INA C. PITT 2000 TOWN CENTER, STE 1350 SOUTHFIELD MI 48075	VICE PRESIDENT 2.00	0.	0.	0.
ERIN R. FRANKEL 2000 TOWN CENTER, STE 1350 SOUTHFIELD MI 48075	DIRECTOR 2.00	0.	0.	0.
See Information about Officers, Directors, Trustees, Etc.		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				
0				
0				
0				
0				

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

None

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 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 None

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 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 instructions.	
3	
Total. Add lines 1 through 3	

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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	
b	Average of monthly cash balances	1b	741,626.
c	Fair market value of all other assets (see instructions)	1c	727,898.
d	Total (add lines 1a, b, and c)	1d	1,469,524.
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	1,469,524.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	22,043.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,447,481.
6	Minimum investment return. Enter 5% of line 5	6	72,374.

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	72,374.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	1,080.
b	Income tax for 2008. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,080.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	71,294.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	71,294.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	71,294.

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	609,058.
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	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	609,058.
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	1,080.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	607,978.

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

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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				71,294.
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__				
3 Excess distributions carryover, if any, to 2008:				
a From 2003	296,854.			
b From 2004	498,715.			
c From 2005	557,038.			
d From 2006	203,212.			
e From 2007	801,026.			
f Total of lines 3a through e	2,356,845.			
4 Qualifying distributions for 2008 from Part XII, line 4: \$ 609,058.				
a Applied to 2007, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2008 distributable amount				71,338.
e Remaining amount distributed out of corpus	537,720.			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	2,894,565.			
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 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)				
8 Excess distributions carryover from 2003 not applied on line 5 or line 7 (see instructions)	296,854.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	2,597,711.			
10 Analysis of line 9:				
a Excess from 2004	498,715.			
b Excess from 2005	557,038.			
c Excess from 2006	203,212.			
d Excess from 2007	801,026.			
e Excess from 2008	537,720.			

BAA

Form 990-PF (2008)

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

N/A

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					
b Check box to indicate whether the foundation is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
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	Tax year	Prior 3 years			(e) Total
	(a) 2008	(b) 2007	(c) 2006	(d) 2005	
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					

Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year – see instructions.)**1 Information Regarding Foundation Managers:**

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

MURRAY C. PITT

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.

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 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
<i>a Paid during the year</i> SEE STATEMENT 2				
Total				3a
<i>b Approved for future payment</i>				
Total				3b

Form 990-PF, Page 6, Part VIII, Line 1

Information about Officers, Directors, Trustees, Etc.

(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
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> JEFFREY S. PITT 2000 TOWN CENTER, STE 1350 SOUTHFIELD MI 48075	DIRECTOR 2.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> CARLEEN F. LUNSFORD 2000 TOWN CENTER, STE 1350 SOUTHFIELD MI 48075	SECR/TREAS 2.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> 				

Total

0. 0. 0.

Form 990-PF, Page 2, Part II, Line 13

L-13 Stmt

Line 13 - Investments - Other:	End of Year	
	Book Value	Fair Market Value
ANNUITIES	398,724.	398,724.
NET CASH VALUE INSURANCE	61,798.	61,798.
Total	<u>460,522.</u>	<u>460,522.</u>

MURRAY C. & INA C. CHARITABLE TRUST
EIN: 38-3268352
11/30/2009

STATEMENT 2

	<u>RECIPIENT</u>	<u>FOUNDATION STATUS</u>	<u>PURPOSE</u>	<u>AMOUNT</u>
1	ALZHEIMERS ASSOCIATION 20300 Civic Center Dr , #100, Southfield, MI 48076	501 (C)(3)	RESEARCH	500
2	ANTI DEFAMATION LEAGUE 25800 Northwestern Hwy , Suite 980, Southfield, MI 48075	501 (C)(3)	RESEARCH	500
3	B'NAI B'RITH INTERNATIONAL 6735 Telegraph Road, Suite 304, Bloomfield Hills, MI 48301	501 (C)(3)	CHARITY	100
4	CAMP MAK-A-DREAM, MICHIGAN CHAPTER 121 W Long Lake Road, Suite 120, Bloomfield Hills, MI 48304	501 (C)(3)	CHARITY	500
5	CENTRAL PARK CONSERVANCY 14 East 60th Street, New York, NY 10022	501 (C)(3)	RESEARCH	1,000
6	COMMUNITIES IN SCHOOLS - JIMMY'S KIDS 5830 Field Street, Detroit, MI 48213	501 (C)(3)	COMMUNITY SERVICES	3,000
7	DETROIT INSTITUTE OF ARTS 5200 Woodward Avenue, Detroit, MI 48202	501 (C)(3)	ARTS	500
8	THE DOE FUND 232 East 84th Street, New York, NY 10028	501 (C)(3)	CHARITY	50
9	THE FRIENDSHIP CIRCLE 6892 West Maple Road, West Bloomfield, MI 48322	501 (C)(3)	RESEARCH	500
10	HILLEL DAY SCHOOL 32200 Middlebelt Road, Farmington Hills, MI 48334	501 (C)(3)	EDUCATION	600
11	INTERNATIONAL CENTER OF PHOTOGRAPHY 1114 Avenue of the Americas, New York, NY 10036	501 (C)(3)	COMMUNITY SERVICES	200
12	THE JCC CENTER 6600 West Maple Road, West Bloomfield, MI 48322	501 (C)(3)	CHARITY	30,000
13	JFS- JEWISH FAMILY SERVICE 6555 West Maple Road, West Bloomfield, MI 48322	501 (C)(3)	EDUCATION	1,000
14	JARC 30301 Northwestern Hwy, Suite 100, Farmington Hills, MI 48334	501 (C)(3)	DISABLED	1,500
15	JAZZ ASPEN SNOWMASS 110 East Hallam, suite 104, Aspen, CO 81611	501 (C)(3)	ARTS	2,500
16	JEWISH FEDERATION OF METRO DETROIT P O Box 2029, Bloomfield Hills, MI 48303-2029	501 (C)(3)	CHARITY	470,000
17	JEWISH WOMEN'S FOUNDATION 6735 Telegraph Road, Bloomfield Hills, MI 48301	501 (C)(3)	CHARITY	4,200
18	KARMANOS CANCER INSTITUTE 4100 John R, Detroit, MI 48201	501(C) (3)	CHARITY	1,525

MURRAY C. & INA C. CHARITABLE TRUST
EIN: 38-3268352
11/30/2009

STATEMENT 2

	<u>RECIPIENT</u>	<u>FOUNDATION STATUS</u>	<u>PURPOSE</u>	<u>AMOUNT</u>
19	LENOX HILL HOSPITAL 100 East 77th Street, New York, NY 10075	501(C) (3)	CHARITY	100
20	MAKE-A-WISH FOUNDATION 230 Huron View Blvd , Ann Arbor, MI 48103	501(C) (3)	CHARITY	500
21	MICHIGAN HUMANE SOCIETY 30300 Telegraph Road, Bingham Farms, MI 48025	501 (C)(3)	ANIMAL SAFETY	2,500
22	MICHIGAN PSYCHOANALYTIC FOUNDATION 32841 Middlebelt Rd , Suite 411, Farmington Hills, MI 48334	501 (C)(3)	EDUCATION	400
23	PANCREATIC CANCER ACTION NETWORK 2141 Rosecrans Ave , Ste 7000, El Segundo, CA 90245	501 (C)(3)	CHARITY	100
24	PATH - PEOPLE ASSISTING THE HOMELESS 340 North Madison Ave , Los Angeles, CA 90004	501 (C)(3)	CHARITY	250
25	ST. JUDES 262 Danny Thomas Place, Memphis, TN 38105	501 (C)(3)	CHARITY	250
26	THE SINAI GUILD 31995 Northwestern Hwy, Suite 117 Farmington Hills, MI 48334	501 (C)(3)	CHARITY	2,000
27	TEMPLE ISRAEL 5725 Walnut Lake Road, West Bloomfield, MI 48323	501 (C)(3)	COMMUNITY SERVICES	4,100
28	UNITED JEWISH FOUNDATION OF METRO DETROIT 6735 Telegraph Road, Bloomfield Hills, MI 48303-2030	501 (C)(3)	CHARITY	43,333
29	UNITED WAY FOR SOUTHEASTERN MICHIGAN 1212 Gnsword Street, Detroit, MI 48226	501 (C)(3)	COMMUNITY SERVICES	5,000
30	UNIVERSITY OF MICHIGAN 3003 S State Street, Suite 8000, Ann Arbor, MI 48109-1288	501 (C)(3)	RESEARCH	20,000
31	WAYNE STATE UNIVERSITY - MATH CORPS Detroit, MI 48202	501 (C)(3)	EDUCATION	500
32	WILLOW HOUSE 302 Saunders Road, Suite 200, Riverwoods, IL 60015	501 (C)(3)	EDUCATION	500
33	WORLD OF CHILDREN 6200 Stonendge Mall Road, 3rd Floor, Pleasanton, CA 94588	501 (C)(3)	EDUCATION	9,000
34	YAD EZRA 2850 W 11 Mile Road, Berkley, MI 48072	501 (C)(3)	CHARITY	2,000

608,708