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

2008

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 <b>BERNARD &amp; SARAH GEWIRZ FOUNDATION</b>		A Employer identification number <b>52-1381689</b>
	Number and street (or P.O. box number if mail is not delivered to street address) <b>1666 K STREET, NW</b>	Room/suite <b>430</b>	B Telephone number <b>202-296-7311</b>
	City or town, state, and ZIP code <b>WASHINGTON, DC 20006</b>		C If exemption application is pending, check here <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		D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ <b>4,271,472.</b> (Part I, column (d) must be on cash basis)		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> 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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		3,801.	3,801.		Statement 1
4 Dividends and interest from securities		30,176.	30,176.		Statement 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		44,647.			
b Gross sales price for all assets on line 6a <b>544,647.</b>					
7 Capital gain net income (from Part IV, line 2)			44,647.		
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 or (loss)					
11 Other income		-381,114.	-381,114.		Statement 3
12 Total. Add lines 1 through 11		-302,490.	-302,490.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees					
c Other professional fees					
17 Interest					
18 Taxes Stmt 4		8,445.	0.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses Stmt 5		117.	0.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		8,562.	0.		0.
25 Contributions, gifts, grants paid		519,938.			519,938.
26 Total expenses and disbursements. Add lines 24 and 25		528,500.	0.		519,938.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-830,990.			
b Net investment income (if negative, enter -0-)			0.		
c Adjusted net income (if negative, enter -0-)				N/A	

LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

Form 990-PF (2008)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
Assets	1 Cash - non-interest-bearing			39,161.	216.	216.	
	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						
	7 Other notes and loans receivable ▶ 41,256.						
	Less: allowance for doubtful accounts ▶			47,404.	41,256.	41,256.	
	8 Inventories for sale or use						
	9 Prepaid expenses and deferred charges						
	10a Investments - U.S. and state government obligations Stmt 6			593,538.	510,003.	520,000.	
	b Investments - corporate stock						
	c Investments - corporate bonds						
Liabilities	11 Investments - land, buildings, and equipment basis ▶						
	Less accumulated depreciation ▶						
	12 Investments - mortgage loans						
	13 Investments - other Stmt 7			4,044,868.	3,342,506.	3,710,000.	
	14 Land, buildings, and equipment: basis ▶						
	Less accumulated depreciation ▶						
	15 Other assets (describe ▶)						
	16 Total assets (to be completed by all filers)			4,724,971.	3,893,981.	4,271,472.	
	17 Accounts payable and accrued expenses						
	18 Grants payable						
Net Assets or Fund Balances	19 Deferred revenue						
	20 Loans from officers, directors, trustees, and other disqualified persons						
	21 Mortgages and other notes payable						
	22 Other liabilities (describe ▶)						
23 Total liabilities (add lines 17 through 22)			0.	0.			
Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>	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 ▶ <input checked="" type="checkbox"/>	and complete lines 27 through 31.					
		27 Capital stock, trust principal, or current funds			0.	0.	
		28 Paid-in or capital surplus, or land, bldg., and equipment fund			0.	0.	
		29 Retained earnings, accumulated income, endowment, or other funds			4,724,971.	3,893,981.	
30 Total net assets or fund balances			4,724,971.	3,893,981.			
31 Total liabilities and net assets/fund balances			4,724,971.	3,893,981.			

## 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	4,724,971.
2 Enter amount from Part I, line 27a	2	-830,990.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	3,893,981.
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	3,893,981.

**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.)
<b>1a FROM PARTNERSHIPS</b>	<b>P</b>		
<b>b FEDERAL HOME LOAN MTG CORP NTS</b>	<b>P</b>	<b>01/22/08</b>	<b>05/05/09</b>
<b>c</b>			
<b>d</b>			
<b>e</b>			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a 44,647.</b>			<b>44,647.</b>
<b>b 500,000.</b>		<b>500,000.</b>	<b>0.</b>
<b>c</b>			
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
<b>a</b>			<b>44,647.</b>
<b>b</b>			<b>0.</b>
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	<b>2</b>	<b>44,647.</b>
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{ }	<b>3</b>	<b>N/A</b>

**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 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	472,271.	3,928,684.	.120211
2006	521,085.	4,420,289.	.117885
2005	478,784.	4,280,209.	.111860
2004	463,681.	4,010,807.	.115608
2003	373,480.	3,441,782.	.108514

<b>2</b> Total of line 1, column (d)	<b>2</b>	<b>.574078</b>
<b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	<b>3</b>	<b>.114816</b>
<b>4</b> Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	<b>4</b>	<b>4,200,808.</b>
<b>5</b> Multiply line 4 by line 3	<b>5</b>	<b>482,320.</b>
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	<b>0.</b>
<b>7</b> Add lines 5 and 6	<b>7</b>	<b>482,320.</b>
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	<b>519,938.</b>

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 instructions)**

1a 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	0.
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	0.
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	0.
6 Credits/Payments:			
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a	7,600.	
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	7,600.	
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	7,600.	
11 Enter the amount of line 10 to be: Credited to 2009 estimated tax <input checked="" type="checkbox"/> 7,600. Refunded <input type="checkbox"/>	11	0.	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a 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 instructions for definition)? 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		X
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. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 0.		
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
4a 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?		
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, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/>		
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

N/A

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>SARAH GEWIRZ</u> Telephone no. ► <u>202-296-7311</u> Located at ► <u>1666 K STREET, NW SUITE 430, WASHINGTON, DC</u> ZIP+4 ► <u>20006</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	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?	<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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
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
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? If "Yes," list the years ► _____, _____, _____, _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____, _____		
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.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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

Form 990-PF (2008)

**Part VII-B** Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ 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)?

N/A

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?

N/A

☐ Yes ☐ No

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

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

6b

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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

X

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 8		0.	0.	0.

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

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

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

▶ 0

Form 990-PF (2008)

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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

0

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

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

	Expenses
1 N/A	
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments

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

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

Form 990-PF (2008)



**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	0.
b Average of monthly cash balances	1b	34,780.
c Fair market value of all other assets	1c	4,230,000.
d Total (add lines 1a, b, and c)	1d	4,264,780.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	4,264,780.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	63,972.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,200,808.
6 Minimum investment return. Enter 5% of line 5	6	210,040.

**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	210,040.
2a Tax on investment income for 2008 from Part VI, line 5	2a	
b Income tax for 2008. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	0.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	210,040.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	210,040.
6 Deduction from distributable amount (see instructions)	6	0.
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	210,040.

**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	519,938.
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	519,938.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	519,938.

**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.

Form 990-PF (2008)

**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				210,040.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2008:				
a From 2003	208,606.			
b From 2004	273,225.			
c From 2005	275,274.			
d From 2006	312,573.			
e From 2007	290,327.			
f Total of lines 3a through e	1,360,005.			
4 Qualifying distributions for 2008 from Part XII, line 4: ▶ \$	519,938.			
a Applied to 2007, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2008 distributable amount				210,040.
e Remaining amount distributed out of corpus	309,898.			
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:	1,669,903.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2007. Subtract line 4a from line 2a. Taxable amount - see instr.			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)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7	208,606.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	1,461,297.			
10 Analysis of line 9:				
a Excess from 2004	273,225.			
b Excess from 2005	275,274.			
c Excess from 2006	312,573.			
d Excess from 2007	290,327.			
e Excess from 2008	309,898.			



**Part XV** Supplementary Information (continued)**3** Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<p><b>a</b> Paid during the year</p> <p>SEE ATTACHED SCHEDULE</p>	NONE	CHARITABLE ORGANIZATIONS	CHARITABLE	519,938.
<b>Total</b>			▶ <b>3a</b>	<b>519,938.</b>
<p><b>b</b> Approved for future payment</p> <p>None</p>				
<b>Total</b>			▶ <b>3b</b>	<b>0.</b>





## Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	Amount
HOSKINSON NOTE	2,250.
PARTNERSHIPS	1,551.
Total to Form 990-PF, Part I, line 3, Column A	3,801.

## Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
PARTNERSHIPS	1,990.	0.	1,990.
PERSHING LLC	28,186.	0.	28,186.
Total to Fm 990-PF, Part I, ln 4	30,176.	0.	30,176.

## Form 990-PF Other Income Statement 3

Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
PARTNERSHIP INCOME	552,792.	552,792.	
MADOFF THEFT LOSS	-933,906.	-933,906.	
Total to Form 990-PF, Part I, line 11	-381,114.	-381,114.	

## Form 990-PF Taxes Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
EXCISE TAX ON INVESTMENT INCOME	8,445.	0.		0.
To Form 990-PF, Pg 1, ln 18	8,445.	0.		0.

Form 990-PF	Other Expenses			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
BANK SERVICE CHARGES	117.	0.		0.	
To Form 990-PF, Pg 1, ln 23	117.	0.		0.	

Form 990-PF	U.S. and State/City Government Obligations			Statement	6
Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value	
M&T SECURITIES	X		510,003.	520,000.	
Total U.S. Government Obligations			510,003.	520,000.	
Total State and Municipal Government Obligations					
Total to Form 990-PF, Part II, line 10a			510,003.	520,000.	

Form 990-PF	Other Investments		Statement	7
Description	Valuation Method	Book Value	Fair Market Value	
1620 K STREET	COST	1,859,651.	2,100,000.	
DORCHESTER HOUSE	COST	489,235.	700,000.	
DORCHESTER JV	COST	111,641.	10,000.	
HOME PROPERTIES	COST	733,151.	750,000.	
KALORAMA WEST LLC	COST	148,828.	150,000.	
Total to Form 990-PF, Part II, line 13		3,342,506.	3,710,000.	



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Form 990-PF      Part VIII - List of Officers, Directors      Statement      8  
Trustees and Foundation Managers

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Name and Address	Title and Avrg Hrs/Wk	Compen- sation	Employee Ben Plan	Expense Contrib Account
BERNARD S. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIR/TREAS 8.00	0.	0.	0.
SARAH M. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIR/SECY 8.00	0.	0.	0.
MICHAEL K. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIR/VP 1.00	0.	0.	0.
JONATHAN K. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIRECTOR 1.00	0.	0.	0.
STEVEN B. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIRECTOR 1.00	0.	0.	0.
Totals included on 990-PF, Page 6, Part VIII		0.	0.	0.

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Form 990-PF	Grant Application Submission Information	Statement	9
	Part XV, Lines 2a through 2d		

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Name and Address of Person to Whom Applications Should be Submitted

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BERNARD S. GEWIRZ  
1666 K ST., NW, #430  
WASHINGTON, DC 20006

---

Telephone Number

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202-296-7311

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Form and Content of Applications

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NO SPECIFIC FORM REQUIRED. APPLICATIONS SHOULD INCLUDE NAME, ADDRESS AND INFORMATION REGARDING CHARITABLE PURPOSE AND STATUS AS EXEMPT ORGANIZATION.

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Any Submission Deadlines

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NONE

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Restrictions and Limitations on Awards

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NONE

**Bernard & Sarah Gewirz Foundation**  
**Transactions by Account**  
**As of November 30, 2009**

	<u>Type</u>	<u>Date</u>	<u>Num</u>	<u>Name</u>	<u>Debit</u>
Donation	Check	01/08/2009	5549	211 Palm beach	<u>500 00</u>
				<b>211 Palm beach</b>	<b>500.00</b>
	Check	12/10/2008	5542	Adas Israel Congregation	108 00
	Check	09/09/2009	5608	Adas Israel Congregation	2,437 00
	Check	09/21/2009	5609	Adas Israel Congregation	5,000 00
	Check	10/26/2009	5620	Adas Israel Congregation	775 00
	Check	11/09/2009	5632	Adas Israel Congregation	<u>108 00</u>
				<b>Adas Israel Congregation Total</b>	<b>8,428.00</b>
	Check	04/20/2009	5575	Albert Einstein College	<u>500 00</u>
				<b>Albert Einstein College Total</b>	<b>500.00</b>
	Check	06/01/2009	5585	American Friends of Tel Avi University	<u>5,000 00</u>
				<b>American Friends of Tel Avi University Total</b>	<b>5,000 00</b>
	Check	10/05/2009	5615	Anti-Defamation League	<u>500 00</u>
				<b>Anti-Defamation League Total</b>	<b>500.00</b>
	Check	04/13/2009	5572	Aquidneck Island Land Trust	<u>5,000 00</u>
				<b>Aquidneck Island Land Trust Total</b>	<b>5,000 00</b>
	Check	02/19/2009	5555	Armory Art Center	<u>500 00</u>
				<b>Armory Art Center Total</b>	<b>500.00</b>
	Check	11/02/2009	5630	Bair Yaakov School	<u>100 00</u>
				<b>Bair Yaakov School Total</b>	<b>100 00</b>
	Check	06/02/2009	5588	Bay Crest Foundation	<u>1,000 00</u>
				<b>Bay Crest Foundation Total</b>	<b>1,000 00</b>
	Check	10/05/2009	5616	B-CC Rescue Squad, Inc	<u>100 00</u>
				<b>B-CC Rescue Squad, Inc. Total</b>	<b>100 00</b>
	Check	09/21/2009	5613	Beauvoir School	<u>10,000 00</u>
				<b>Beauvoir School Total</b>	<b>10,000 00</b>
	Check	08/27/2009	5606	Blathewold Morrison G	<u>1,500 00</u>
				<b>Blathewold Morrison G Total</b>	<b>1,500 00</b>
	Check	12/05/2008	5529	Bnai Brith	10,000 00
	Check	07/18/2009	5595	Bnai Brith	<u>118 00</u>
				<b>Bnai Brith Total</b>	<b>10,118 00</b>
	Check	11/16/2009	5639	Breast Cancer Research Foundation	<u>500 00</u>
				<b>Breast Cancer Research Foundation Total</b>	<b>500.00</b>
	Check	02/01/2009	5553	Childrens Hospital Foundation	<u>2,000 00</u>
				<b>Childrens Hospital Foundation Total</b>	<b>2,000.00</b>

**Bernard & Sarah Gewirz Foundation**  
**Transactions by Account**  
**As of November 30, 2009**

<u>Type</u>	<u>Date</u>	<u>Num</u>	<u>Name</u>	<u>Debit</u>
Check	12/08/2008	5536	Cystic Fibrosis Foundation	<u>500.00</u>
			<b>Cystic Fibrosis Foundation Total</b>	<b>500.00</b>
Check	12/05/2008	5531	Focus	5,000.00
Check	03/10/2009	5560	Focus	<u>4,500.00</u>
			<b>Focus Total</b>	<b>9,500.00</b>
Check	05/04/2009	5578	Friends of Ballard Park	<u>100.00</u>
			<b>Friends of Ballard Park Total</b>	<b>100.00</b>
Check	11/02/2009	5631	Friends of the Jewish Chapel	<u>250.00</u>
			<b>Friends of the Jewish Chapel Total</b>	<b>250.00</b>
Check	12/08/2008	5537	Georgetown Law Annual Fund	1,000.00
Check	06/01/2009	5583	Georgetown Law Annual Fund	1,000.00
Check	10/26/2009	5624	Georgetown Law Annual Fund	<u>1,000.00</u>
			<b>Georgetown Law Annual Fund Total</b>	<b>3,000.00</b>
Check	10/28/2009	5626	Georgetown Medical Center	<u>100,000.00</u>
			<b>Georgetown Medical Center Total</b>	<b>100,000.00</b>
Check	07/27/2009	5600	Georgetown University	<u>10,000.00</u>
			<b>Georgetown University Total</b>	<b>10,000.00</b>
Check	03/10/2009	5557	Harbor Branch Oceanographic Inst Inc	<u>150.00</u>
			<b>Harbor Branch Oceanographic Inst., Inc. Total</b>	<b>150.00</b>
Check	12/08/2008	5533	Hebrew Home of Greater Washington	2,000.00
Check	09/29/2009	5614	Hebrew Home of Greater Washington	<u>2,000.00</u>
			<b>Hebrew Home of Greater Washington Total</b>	<b>4,000.00</b>
Check	12/05/2008	5530	Historical Society of Washington, DC	<u>10,000.00</u>
			<b>Historical Society of Washington, DC Total</b>	<b>10,000.00</b>
Check	05/11/2009	5580	HNSA	<u>250.00</u>
			<b>HNSA Total</b>	<b>250.00</b>
Check	12/16/2008	5543	Hospice Foundation of Palm Beach Conty	5,000.00
Check	02/05/2009	5554	Hospice Foundation of Palm Beach Conty	200.00
Check	04/27/2009	5577	Hospice Foundation of Palm Beach Conty	<u>20,000.00</u>
			<b>Hospice Foundation of Palm Beach Conty Total</b>	<b>25,200.00</b>
Check	12/08/2008	5540	International Tennis Hall of Fame	<u>3,000.00</u>
			<b>International Tennis Hall of Fame Total</b>	<b>3,000.00</b>
Check	05/04/2009	5579	Island Moving Co	1,250.00
Check	11/16/2009	5638	Island Moving Co	<u>300.00</u>
			<b>Island Moving Co Total</b>	<b>1,550.00</b>

**Bernard & Sarah Gewirz Foundation**  
**Transactions by Account**  
**As of November 30, 2009**

<u>Type</u>	<u>Date</u>	<u>Num</u>	<u>Name</u>	<u>Debit</u>
Check	11/16/2009	5637	Jewish Endowment Fund	<u>25,000.00</u>
			<b>Jewish Endowment Fund Total</b>	<b>25,000.00</b>
Check	07/18/2009	5593	Jewish Historical Society	1,800.00
Check	09/21/2009	5610	Jewish Historical Society	<u>500.00</u>
			<b>Jewish Historical Society Total</b>	<b>2,300.00</b>
Check	12/08/2008	5534	Jewish Historical Society of Greater Wash	<u>1,800.00</u>
			<b>Jewish Historical Society of Greater Wash Total</b>	<b>1,800.00</b>
Check	03/10/2009	5558	John F. Kennedy Center for the Arts	<u>50,000.00</u>
			<b>John F. Kennedy Center for the Arts Total</b>	<b>50,000.00</b>
Check	03/20/2009	5566	John Hopkins Hospital	<u>1,000.00</u>
			<b>John Hopkins Hospital Total</b>	<b>1,000.00</b>
Check	07/27/2009	5599	Kennedy Center	10,000.00
Check	10/26/2009	5622	Kennedy Center	<u>1,500.00</u>
			<b>Kennedy Center Total</b>	<b>11,500.00</b>
Check	10/26/2009	5623	Kiwanis Club of Wahington	<u>75.00</u>
			<b>Kiwanis Club of Wahington Total</b>	<b>75.00</b>
Check	03/10/2009	5559	Landon School Annual Fund	<u>10,000.00</u>
			<b>Landon School Annual Fund Total</b>	<b>10,000.00</b>
Check	03/20/2009	5562	Levine School of Music	<u>5,000.00</u>
			<b>Levine School of Music Total</b>	<b>5,000.00</b>
Check	12/08/2008	5538	Lincoln Center Institute	<u>500.00</u>
			<b>Lincoln Center Institute Total</b>	<b>500.00</b>
Check	12/08/2008	5535	Mercersburg Academy	<u>200.00</u>
			<b>Mercersburg Academy Total</b>	<b>200.00</b>
Check	06/04/2009	5589	Michael J. Fox Foundation	<u>300.00</u>
			<b>Michael J. Fox Foundation Total</b>	<b>300.00</b>
Check	11/16/2009	5634	National Cathedral School	<u>2,500.00</u>
			<b>National Cathedral School Total</b>	<b>2,500.00</b>
Check	10/28/2009	5625	National Gallery of Art	1,000.00
Check	11/16/2009	5633	National Gallery of Art	<u>25,000.00</u>
			<b>National Gallery of Art Total</b>	<b>26,000.00</b>
Check	04/13/2009	5573	National Museum of Women in the Arts	<u>100.00</u>
			<b>National Museum of Women in the Arts Total</b>	<b>100.00</b>

**Bernard & Sarah Gewirz Foundation**  
**Transactions by Account**  
**As of November 30, 2009**

Type	Date	Num	Name	Debit
Check	04/06/2009	5571	Newport Art Museum	1,000 00
Check	04/27/2009	5576	Newport Art Museum	5,000 00
Check	07/18/2009	5596	Newport Art Museum	1,600 00
Check	09/21/2009	5612	Newport Art Museum	<u>250 00</u>
			<b>Newport Art Museum Total</b>	<b>7,850.00</b>
Check	06/12/2009	5590	Newport Flower Show	<u>1,300 00</u>
			<b>Newport Flower Show Total</b>	<b>1,300.00</b>
Check	12/08/2008	5539	Newport Historical Society	500 00
Check	12/08/2008	5648	Newport Historical Society	<u>1,000 00</u>
			<b>Newport Historical Society Total</b>	<b>1,500.00</b>
Check	06/01/2009	5582	Newport Hospital Foundation	<u>1,000 00</u>
			<b>Newport Hospital Foundation Total</b>	<b>1,000.00</b>
Check	10/05/2009	5617	Newport Music Festival	<u>600 00</u>
			<b>Newport Music Festival Total</b>	<b>600.00</b>
Check	10/28/2009	5627	Norman Ing Sanctuary	<u>2,500 00</u>
			<b>Norman Ing Sanctuary Total</b>	<b>2,500.00</b>
Check	01/26/2009	5550	NY Langrove Medical Center	<u>1,000 00</u>
			<b>NY Langrove Medical Center Total</b>	<b>1,000.00</b>
Check	03/20/2009	5567	Palm Beach Civic Assoc	<u>500 00</u>
			<b>Palm Beach Civic Assoc. Total</b>	<b>500.00</b>
Check	01/26/2009	5552	Palm Beach Council of the Firefighters	<u>50 00</u>
			<b>Palm Beach Council of the Firefighters Total</b>	<b>50.00</b>
Check	08/13/2009	5603	Palm Beach Country Club Foundation	<u>1,000 00</u>
			<b>Palm Beach Country Club Foundation Total</b>	<b>1,000.00</b>
Check	03/20/2009	5565	Preservation Society of Newport County	5,000 00
Check	06/01/2009	5584	Preservation Society of Newport County	8,000 00
Check	06/02/2009	5587	Preservation Society of Newport County	1,000 00
Check	06/22/2009	5592	Preservation Society of Newport County	250 00
Check	07/27/2009	5597	Preservation Society of Newport County	2,000 00
Check	07/27/2009	5598	Preservation Society of Newport County	<u>10,000 00</u>
			<b>Preservation Society of Newport County Total</b>	<b>26,250.00</b>
Check	10/26/2009	5621	Raymond Kravis Center for the Performing	<u>1,000 00</u>
			<b>Raymond Kravis Center for the Performing Total</b>	<b>1,000.00</b>
Check	04/06/2009	5570	Redwood Library	5,000 00
Check	06/16/2009	5591	Redwood Library	5,000 00
Check	08/13/2009	5602	Redwood Library	150 00
Check	08/20/2009	5604	Redwood Library	<u>1,000 00</u>

**Bernard & Sarah Gewirz Foundation**  
**Transactions by Account**  
**As of November 30, 2009**

<u>Type</u>	<u>Date</u>	<u>Num</u>	<u>Name</u>	<u>Debit</u>
			<b>Redwood Library Total</b>	<b>11,150.00</b>
Check	08/09/2009	5601	Salve Regina University	<u>200.00</u>
			<b>Salve Regina University Total</b>	<b>200.00</b>
Check	05/11/2009	5581	Save the Revolution	<u>50.00</u>
			<b>Save the Revolution Total</b>	<b>50.00</b>
Check	04/20/2009	5574	Shake A Leg Annual	500.00
Check	07/18/2009	5594	Shake A Leg Annual	<u>100.00</u>
			<b>Shake A Leg Annual Total</b>	<b>600.00</b>
Check	06/02/2009	5586	Sibley Hospital	<u>2,500.00</u>
			<b>Sibley Hospital Total</b>	<b>2,500.00</b>
Check	09/21/2009	5611	Sixth & J Historic Synagogue	<u>1,000.00</u>
			<b>Sixth &amp; J Historic Synagogue Total</b>	<b>1,000.00</b>
Check	11/02/2009	5629	St Albani's School	1,000.00
Check	11/16/2009	5635	St Albani's School	<u>2,500.00</u>
			<b>St Albani's School Total</b>	<b>3,500.00</b>
Check	12/10/2008	5541	St Andrews School	500.00
Check	03/20/2009	5563	St Andrews School	<u>1,000.00</u>
			<b>St. Andrews School Total</b>	<b>1,500.00</b>
Check	08/27/2009	5607	The Kennall Institute	<u>10,000.00</u>
			<b>The Kennall Institute Total</b>	<b>10,000.00</b>
Check	04/06/2009	5568	The Trust ofr the National Mall	<u>1,000.00</u>
			<b>The Trust ofr the National Mall Total</b>	<b>1,000.00</b>
Check	08/20/2009	5605	Touro Synagogue Foundation	<u>1,067.00</u>
			<b>Touro Synagogue Foundation Total</b>	<b>1,067.00</b>
Check	12/05/2008	5528	Town of Palm Beach United Way	25,000.00
Check	01/26/2009	5551	Town of Palm Beach United Way	<u>500.00</u>
			<b>Town of Palm Beach United Way Total</b>	<b>25,500.00</b>
Check	12/05/2008	5532	UIA Federation	<u>500.00</u>
			<b>UIA Federation Total</b>	<b>500.00</b>
Check	02/19/2009	5556	United States Navy Memorial Foundation	<u>100.00</u>
			<b>United States Navy Memorial Foundation Total</b>	<b>100.00</b>
Check	10/28/2009	5628	United Way of Rhode Island	<u>59,000.00</u>
			<b>United Way of Rhode Island Total</b>	<b>59,000.00</b>
Check	03/20/2009	5564	Washington Ballet	2,000.00

**Bernard & Sarah Gewirz Foundation**  
**Transactions by Account**  
**As of November 30, 2009**

<u>Type</u>	<u>Date</u>	<u>Num</u>	<u>Name</u>	<u>Debit</u>
Check	11/16/2009	5636	Washington Ballet	<u>5,000.00</u>
			Washington Ballet Total	<u>7,000.00</u>
Check	04/06/2009	5569	Washington DC SCC	<u>1,000.00</u>
			Washington DC SCC Total	<u>1,000.00</u>
Check	03/12/2009	5561	YWCA Harmony House	<u>200.00</u>
			YWCA Harmony House Total	<u>200.00</u>
			Grand Total	<u>519,938.00</u>