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

OMB No 1545-0052

2009

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 2009, or tax year beginning

, and ending

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions.

Name of foundation

ANDERMAN FOUNDATION

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

39 WENSLEY DRIVE

City or town, state, and ZIP code

GREAT NECK, NY 11021

A Employer identification number

11-2547291

B Telephone number

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

J Accounting method:

☒ Cash☐ Accrual

(from Part II, col (c), line 16)

☐ Other (specify)

\$ 1,426,885. (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))(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	36,900.		N/A		
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B					
	3 Interest on savings and temporary cash investments					
	4 Dividends and interest from securities	19,645.	19,645.		STATEMENT 1	
	5a Gross rents					
	b Net rental income or (loss)					
	6a Net gain or (loss) from sale of assets not on line 10	-26,389.				
	b Gross sales price for all assets on line 6a	522,296.				
	7 Capital gain net income (from Part IV, line 2)		0.			
	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						
12 Total. Add lines 1 through 11	30,156.	19,645.				
Operating and Administrative Expenses	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	STMT 2	2,500.	0.		0.
	c Other professional fees	STMT 3	10,882.	10,882.		0.
	17 Interest					
	18 Taxes	STMT 4	488.	488.		0.
	19 Depreciation and depletion					
	20 Occupancy					
	21 Travel, conferences, and meetings					
	22 Printing and publications					
	23 Other expenses	STMT 5	250.	0.		0.
	24 Total operating and administrative expenses. Add lines 13 through 23		14,120.	11,370.		0.
	25 Contributions, gifts, grants paid		76,103.			76,103.
26 Total expenses and disbursements. Add lines 24 and 25		90,223.	11,370.		76,103.	
27 Subtract line 26 from line 12:						
a Excess of revenue over expenses and disbursements		-60,067.				
b Net investment income (if negative, enter -0-)			8,275.			
c Adjusted net income (if negative, enter -0-)				N/A		

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

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	358,853.	97,752.	97,752.
	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 ▶			
	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			
	b Investments - corporate stock	841,935.	1,042,969.	1,329,133.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	1,200,788.	1,140,721.	1,426,885.
	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.		
Net Assets or Fund Balances	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	1,200,788.	1,140,721.		
30 Total net assets or fund balances	1,200,788.	1,140,721.		
31 Total liabilities and net assets/fund balances	1,200,788.	1,140,721.		

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	1,200,788.
2 Enter amount from Part I, line 27a	2	-60,067.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,140,721.
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	1,140,721.

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 NEUBERGER BERMAN- SEE STATEMENT ATTACHED	P	VARIOUS	12/31/09
b NEUBERGER BERMAN- SEE STATEMENT ATTACHED	P	VARIOUS	12/31/09
c CAPITAL GAINS DIVIDENDS			
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 312,588.		327,579.	-14,991.
b 209,579.		221,106.	-11,527.
c 129.			129.
d			
e			

(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			-14,991.
b			-11,527.
c			129.
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	-26,389.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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))
2008	64,882.	1,456,653.	.044542
2007	60,107.	1,489,247.	.040361
2006	57,238.	1,381,417.	.041434
2005	66,570.	1,227,619.	.054227
2004	71,245.	1,088,689.	.065441

2 Total of line 1, column (d)	2	.246005
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	.049201
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,175,811.
5 Multiply line 4 by line 3	5	57,851.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	83.
7 Add lines 5 and 6	7	57,934.
8 Enter qualifying distributions from Part XII, line 4	8	76,103.

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 or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	83.
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		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		3	83.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	83.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 3,166.	7	3,166.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	3,083.
7 Total credits and payments. Add lines 6a through 6d		11	0.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input checked="" type="checkbox"/> 3,083. Refunded <input checked="" type="checkbox"/>			

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"/> NY		
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 2009 or the taxable year beginning in 2009 (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

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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)(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 ► N/A	13	X	
14	The books are in care of ► ANDERMAN FOUNDATION Located at ► 39 WENSLEY DRIVE, GREAT NECK, NY	Telephone no. ► 718-268-4000 ZIP+4 ► 11021		
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 2009?		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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? 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 2009 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 2009.)	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 2009?		4b

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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)?

☐ 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

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

If "Yes" to 6b, file Form 8870.

☐ Yes ☒ No

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

N/A

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

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
ARTHUR A. ANDERMAN 39 WENSLEY DRIVE GREAT NECK, NY 11021	PRESIDENT 0.00	0.	0.	0.
CAROLE J. ANDERMAN 39 WENSLEY DRIVE GREAT NECK, NY 11021	TREASURER 0.00	0.	0.	0.

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

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

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

0

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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	
	0.
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 NONE	
	0.
2	
All other program-related investments. See instructions.	
3 NONE	
	0.
	0.
Total. Add lines 1 through 3	0.

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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	1,064,087.
b	Average of monthly cash balances	1b	129,630.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,193,717.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,193,717.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	17,906.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,175,811.
6	Minimum investment return. Enter 5% of line 5	6	58,791.

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	58,791.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	83.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	83.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	58,708.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	58,708.
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	58,708.

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	76,103.
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	76,103.
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	83.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	76,020.

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 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				58,708.
2 Undistributed income, if any, as of the end of 2009			0.	
a Enter amount for 2008 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	19,745.			
b From 2005	11,271.			
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	31,016.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$	76,103.			
a Applied to 2008, 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 2009 distributable amount				58,708.
e Remaining amount distributed out of corpus	17,395.			
5 Excess distributions carryover applied to 2009 (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:	48,411.			
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 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				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 2004 not applied on line 5 or line 7	19,745.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	28,666.			
10 Analysis of line 9:				
a Excess from 2005	11,271.			
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009	17,395.			

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)				
a <i>Paid during the year</i> SEE STATEMENT ATTACHED	NONE/501C3			76,103.
Total				76,103.
b <i>Approved for future payment</i>				
NONE				
Total				0.

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.		

[illegible]

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
N/A		

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 <u>Arthur A. Ruderman</u> Date <u>5/14/2010</u>		Title <u>President</u>	
Paid Preparer's Use Only	Preparer's signature <u>[Signature]</u> Date <u>5/14/2010</u>	Check if self-employed <input type="checkbox"/>	Preparer's identifying number <u>P00227586</u>	
	Firm's name (or yours if self-employed), address, and ZIP code <u>JOEL ISAACSON & CO, LLC</u> <u>546 FIFTH AVENUE 20TH FL</u> <u>NEW YORK, NY 10036</u>	EIN <u>27-1207072</u>	Phone no. <u>212-302-6300</u>	

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, or 990-PF.

OMB No 1545-0047

2009

Name of the organization

ANDERMAN FOUNDATION

Employer identification number

11-2547291

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 an organization 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 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 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 (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions 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 990-EZ that received from any one contributor, during the year, 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. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions
for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

ANDERMAN FOUNDATION

11-2547291

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	MR, & MRS. TIBERIU WIESZ 178-23 EDGERTON ROAD JAMAICA ESTATES, NY 11432	\$ 7,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
2	MR. & MRS. MICHAEL BROFMAN 75-08 BELL BOULEVARD BAYSIDE, NY 11364	\$ 7,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
3	DR. & MRS. RICHARD MEYER 180-03 TUDO ROAD JAMAICA, NY 11432	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
4	VARIOUS CONTRIBUTIONS UNDER \$5,000	\$ 17,400.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
NEUBERGER BERMAN 541-19011	19,645.	0.	19,645.
TOTAL TO FM 990-PF, PART I, LN 4	19,645.	0.	19,645.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING FEES	2,500.	0.		0.	
TO FORM 990-PF, PG 1, LN 16B	2,500.	0.		0.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
N&B INVESTMENT MANAGEMENT FEES	10,882.	10,882.			0.
TO FORM 990-PF, PG 1, LN 16C	10,882.	10,882.			0.

FORM 990-PF	TAXES		STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID - NEUBERGER	488.	488.		0.
TO FORM 990-PF, PG 1, LN 18	488.	488.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FILING FEES	250.	0.		0.
TO FORM 990-PF, PG 1, LN 23	250.	0.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS	1,042,969.	1,329,133.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,042,969.	1,329,133.

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT	7
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NAME OF CONTRIBUTOR	ADDRESS
MR. & MRS. TIBERIU WEISZ	178-23 EDGERTON ROAD JAMAICA ESTATES, NY 11432-1430
MR. & MRS. MICHAEL BROFMAN	75-08 BELL BOULEVARD BAYSIDE, NY 11364
DR. & MRS. RICHARD MEYER	180-03 TUDOR ROAD JAMAICA , NY 11432

Security Description	Indicator	Quantity	Purchase Date	Close Date	Total Cost	Net Amount	Short Term Gains/Losses
***COMPANHIA VALE DO RIO DOCE SPONSORED ADR	ST	600 000	05 Jan 2009*	07 May 2009*	8,568 84	10,918 99	2,350 15
***MELCO CROWN ENTERTAINMENT LTD ADR	ST	1,500 000	01 Sep 2009*	04 Nov 2009*	8,968 50	7,540 90	-1,427 60
***MELCO CROWN ENTERTAINMENT LTD ADR	ST	1,400 000	01 Sep 2009*	06 Nov 2009*	8,370 60	6,974 75	-1,395 85
***UNILEVER N V NEW YORK SHS NEW	ST	400 000	02 Jul 2009*	02 Nov 2009*	9,686 44	12,420 80	2,734 36
***VALE S A SPONSORED ADR	ST	650 000	05 Jan 2009*	09 Nov 2009*	9,282 91	18,658 35	9,375 44
BANK OF AMER CORP	ST	500 000	20 Oct 2008*	16 Jan 2009*	11,947 85	3,570 38	-8,377 57
BANK OF AMER CORP	ST	550 000	23 Oct 2008*	16 Jan 2009*	12,058 20	3,927 42	-8,130 78
BANK OF AMER CORP	ST	900 000	09 Dec 2008*	16 Jan 2009*	15,942 96	8,426 68	-9,516 28
CHINA FUND INC	ST	92 000	30 Jan 2009*	06 Feb 2009*	1,469 24	1,469 70	0 46
CHINA FUND INC	ST	0 580	30 Jan 2009*	10 Feb 2009*	9 30	9 39	0 09
EXELON CORP	ST	600 000	30 Dec 2008*	27 Jul 2009*	32,208 54	31,496 00	-712 54
FPL GROUP INC	ST	700 000	19 Dec 2008*	30 Jun 2009*	35,573 72	39,379 51	3,805 79
ISHARES TR FTSE XINHUA HK CHINA 25 INDEX	ST	400 000	15 Oct 2008*	11 May 2009*	11,281 18	13,784 68	2,523 50
J P MORGAN CHASE & CO	ST	150 000	23 Jun 2008*	24 Feb 2009*	5,557 15	3,020 47	-2,536 68
J P MORGAN CHASE & CO	ST	550 000	17 Mar 2008*	24 Feb 2009*	22,099 12	11,075 07	-11,024 05
J P MORGAN CHASE & CO	ST	650 000	23 Jun 2008*	02 Mar 2009*	24,081 01	13,905 96	-10,175 05
LABORATORY CORP AMER HLDGS	ST	500 000	29 Dec 2008*	14 Oct 2009*	31,600 70	33,481 44	1,880 74
PHILIP MORRIS INTERNATIONAL	ST	800 000	18 Dec 2008*	17 Sep 2009*	34,074 24	38,198 53	4,124 29
SOUTHWESTERN ENERGY CO	ST	250 000	20 Oct 2008*	03 Jun 2009*	8,122 78	10,411 91	2,289 13
VENTAS INC	ST	700 000	29 Dec 2008*	07 Aug 2009*	21,405 86	26,960 50	5,554 64
VENTAS INC	ST	500 000	29 Dec 2008*	10 Aug 2009*	<u>15,289 90</u>	<u>18,956 71</u>	<u>3,666 81</u>
					327,579 14	312,568 14	-14,991 00

Security Description	Indicator	Quantity	Purchase Date	Close Date	Total Cost	Net Amount	Long Term Gains/Losses
***ACCENTURE LTD CL A	LT	650 000	10 Oct 2006*	20 Feb 2009*	20,618 39	19,380 62	-1,237 77
***ACCENTURE LTD CL A	LT	650 000	10 Oct 2006*	03 Mar 2009*	20,618 39	17,968 69	-2,649 70
BERKSHIRE HATHAWAY INC CL B	LT	12 000	18 May 2004*	20 Feb 2009*	35,031 41	27,801 35	-7,230 06
CAVCO INDS INC DEL	LT	850 000	04 May 2005*	06 May 2009*	23,115 16	20,379 33	-2,735 83
EMC CORP-MASS	LT	1,550 000	28 Apr 2008*	09 Oct 2009*	24,567 65	28,085 22	3,517 57
GALLAGHER ARTHUR J & CO	LT	1,500 000	06 Oct 2006*	27 Mar 2009*	40,713 75	26,198 25	-14,515 50
ISHARES TR FTSE XINHUA HK CHINA 25 INDEX	LT	350 000	15 Oct 2008*	30 Oct 2009*	9,853 54	14,850 82	4,997 28
XTO ENERGY INC	LT	500 000	24 Oct 2008*	21 Dec 2009*	16,513 95	23,447 35	6,933 40
XTO ENERGY INC	LT	600 000	26 Aug 2008*	21 Dec 2009*	30,073 32	28,136 81	-1,936 51
CHINA FUND INC	LT	600 000		23 Jan 2009*	0 00	3,201 66	3,201 66
VENTAS INC	LT	19 010		31 Mar 2009*	0 00	19 01	19 01
VENTAS INC	LT	45 310		31 Mar 2009*	0 00	45 31	45 31
VENTAS INC	LT	19 010		30 Jun 2009*	0 00	19 01	19 01
VENTAS INC	LT	45 310		30 Jun 2009*	<u>0 00</u>	<u>45 31</u>	<u>45 31</u>
					221,105 56	209,578 74	-11,526 82

ANDERMAN FOUNDATION
Charitable Contributions

Name	Balance
Avon Walk for Breast Cancer	
Avon Walk for Breast Cancer	50.00
Total Avon Walk for Breast Cancer	50.00
Cong B'nai Israel	
Cong B'nai Israel	300.00
Total Cong B'nai Israel	300.00
Congreg Ezrath Israel	
Congreg Ezrath Israel	100.00
Total Congreg Ezrath Israel	100.00
Friends of Candlewood	
Friends of Candlewood	40.00
Total Friends of Candlewood	40.00
Iranian American Jewish Federation	
Iranian American Jewish Federation	1,000.00
Total Iranian American Jewish Federation	1,000.00
Jewish Community Center in Sherman	
Jewish Community Center in Sherman	250.00
Total Jewish Community Center in Sherman	250.00
North Shore Hebrew Academy	
North Shore Hebrew Academy	12,000.00
Total North Shore Hebrew Academy	12,000.00
Rabbinical Assembly	
Rabbinical Assembly	1,000.00
Total Rabbinical Assembly	1,000.00
Temple Adas Yoshuron	
Temple Adas Yoshuron	50.00
Total Temple Adas Yoshuron	50.00
The Museum Fund	
The Museum Fund	180.00
Total The Museum Fund	180.00
WNYC	
WNYC	25.00
WNYC	55.00
Total WNYC	55.00
Diabetes Foundation	
Diabetes Foundation	25.00
Total Diabetes Foundation	25.00
Hillcrest Jewish Center	
Hillcrest Jewish Center	15,000.00
Total Hillcrest Jewish Center	15,000.00

Name	Balance
Jewish Community Center on the Palisades	
Jewish Community Center on the Palisades	250.00
Total Jewish Community Center on the Palisades	250.00
Queens College Foundation	
Queens College Foundation	10,000.00
Queens College Foundation	10,120.00
Queens College Foundation	20,120.00
Total Queens College Foundation	20,120.00
Revlon Run Walk for Women	
Revlon Run Walk for Women	50.00
Total Revlon Run Walk for Women	50.00
Solomon Schechter Day School of Bergen Cou	
Solomon Schechter Day School of Bergen Cou	9,000.00
Total Solomon Schechter Day School of Bergen Cou	9,000.00
Stefan Lichter Memorial Fund	
Stefan Lichter Memorial Fund	250.00
Total Stefan Lichter Memorial Fund	250.00
Temple Emanuel	
Temple Emanuel	118.00
Temple Emanuel	748.00
Temple Emanuel	1,398.00
Temple Emanuel	4,998.00
Total Temple Emanuel	4,998.00
Temple Israel	
Temple Israel	6,000.00
Total Temple Israel	6,000.00
Temple Israel of Great Neck	
Temple Israel of Great Neck	360.00
Temple Israel of Great Neck	5,360.00
Total Temple Israel of Great Neck	5,360.00
WLIW 21	
WLIW 21	25.00
Total WLIW 21	25.00
TOTAL	76,103.00