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

2009

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 change

Use the IRS label Otherwise, print or type See Specific Instructions.	Name of foundation J WEINSTEIN FOUNDATION, INC.		A Employer identification number 11-6003595
	Number and street (or P.O. box number if mail is not delivered to street address) ROCKRIDGE FARM 961 ROUTE 52		B Telephone number 845-225-7647
	City or town, state, and ZIP code CARMEL, NY 10512		C If exemption application is pending, check here ☐
			D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 65% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 5,185,040.		J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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			N/A	
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	1,220.	1,220.		STATEMENT 1
	4 Dividends and interest from securities	143,444.	143,444.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	12,823.			
	b Gross sales price for all assets on line 6a	127,217.			
	7 Capital gain net income (from Part IV, line 2)		12,823.		
	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	157,487.	157,487.			
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				
	c Other professional fees				
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 3	11.	0.		0.
	24 Total operating and administrative expenses. Add lines 13 through 23	11.	0.		0.
	25 Contributions, gifts, grants paid	202,000.			202,000.
26 Total expenses and disbursements. Add lines 24 and 25	202,011.	0.		202,000.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<44,524.>				
b Net investment income (if negative, enter -0-)		157,487.			
c Adjusted net income (if negative, enter -0-)			N/A		

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Part II Balance Sheets		Beginning of year (a) Book Value	End of year	
			(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	610,661.	532,504.	532,504.
	2 Savings and temporary cash investments	24,586.	24,189.	24,189.
	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 STMT 4	1,637,902.	1,671,932.	4,628,347.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
Liabilities	14 Land, buildings, and equipment: basis ▶ Less: accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	2,273,149.	2,228,625.	5,185,040.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	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 ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	2,273,149.	2,228,625.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances	2,273,149.	2,228,625.	
	31 Total liabilities and net assets/fund balances	2,273,149.	2,228,625.	

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	2,273,149.
2 Enter amount from Part I, line 27a	2	<44,524.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,228,625.
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	2,228,625.

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 COMMON STOCK			P	VARIOUS	VARIOUS
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 127,217.		114,394.	12,823.		
b					
c					
d					
e					
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			
a			12,823.		
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	12,823.	
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	216,474.	3,965,152.	.054594
2007	290,963.	5,863,710.	.049621
2006	251,450.	6,438,818.	.039052
2005	235,050.	5,854,742.	.040147
2004	292,900.	5,418,265.	.054058
2 Total of line 1, column (d)			2 .237472
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 .047494
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 4,190,988.
5 Multiply line 4 by line 3			5 199,047.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,575.
7 Add lines 5 and 6			7 200,622.
8 Enter qualifying distributions from Part XII, line 4			8 202,000.

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 ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	1,575.
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	1,575.
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	1,575.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	8,000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	8,000.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	47.	
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	6,378.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax ☒ 2,000. Refunded ☐	11	4,378.	

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
1b 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. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 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) ☒ 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

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 ► TAXPAYER Telephone no. ► 845-225-7647 Located at ► ROCKRIDGE FARM 961 ROUTE 52, CARMEL, NY ZIP+4 ► 10512			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15		N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? 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 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 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 ►	☐ Yes ☒ 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?	☒ Yes ☐ 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.)		3b X
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b 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)? ☐ 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****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****X****b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, 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?

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
SYLVIA W. SHULMAN 911 PARK AVENUE NEW YORK, NY 10021	VP/DIR 1.00	0.	0.	0.
LLOYD J. SHULMAN ROCKRIDGE FARM 961 ROUTE 52 CARMEL, NY 10512	PRES./DIR 2.00	0.	0.	0.
SALVATORE CAPPUZZO ROCKRIDGE FARM 961 ROUTE 52 CARMEL, NY 10512	SEC/TRES 2.00	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**

Form 990-PF (2009)

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	3,658,840.
b	Average of monthly cash balances	1b	595,970.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	4,254,810.
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	4,254,810.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	63,822.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,190,988.
6	Minimum investment return. Enter 5% of line 5	6	209,549.

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	209,549.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	1,575.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,575.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	207,974.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	207,974.
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	207,974.

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	202,000.
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	202,000.
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	1,575.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	200,425.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				207,974.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	26,625.			
b From 2005	40,179.			
c From 2006				
d From 2007	17,388.			
e From 2008	22,268.			
f Total of lines 3a through e	106,460.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$	202,000.			
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				202,000.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	5,974.			5,974.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	100,486.			
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	20,651.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	79,835.			
10 Analysis of line 9:				
a Excess from 2005	40,179.			
b Excess from 2006				
c Excess from 2007	17,388.			
d Excess from 2008	22,268.			
e Excess from 2009				

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 2009, enter the date of the ruling

- b**
- Check box to indicate whether the foundation is a private operating foundation described in section
- ☐
- 4942(j)(3) or
- ☐
- 4942(j)(5)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE STATEMENT 5				202,000.
b Approved for future payment				
NONE				0.

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
OTHER	1,220.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	1,220.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
COMMON & PREFERRED SECURITIES	128,725.	0.	128,725.
OTHER SECURITIES	14,719.	0.	14,719.
TOTAL TO FM 990-PF, PART I, LN 4	143,444.	0.	143,444.

FORM 990-PF OTHER EXPENSES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS	11.	0.		0.
TO FORM 990-PF, PG 1, LN 23	11.	0.		0.

FORM 990-PF CORPORATE STOCK STATEMENT 4

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BP AMOCO PLC	34,054.	1,860,721.
FORD MOTOTR COPMANY CAPITAL TR II 6.5%	225,657.	239,520.
FREEPORT MCMORAN COPPER AND GOLD	0.	0.
GENESIS LEASE LTD ADR	101,036.	35,720.
J.W. MAYS, INC	851,070.	1,897,668.
MAINE & MARITIMES CORP	0.	0.
OCCIDENTAL PETROLEUM	27,500.	162,700.
PNM RESOURCES	101,149.	48,108.
PROSPECT CAPITAL CORP	92,419.	61,776.
SEMPRA ENERGY	8,910.	25,247.

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VECTREN CORP	12,688.	98,720.
FPL GROUP INC	20,715.	17,167.
AVERY DENISON CORP 7.85% CV	120,116.	96,750.
CHEASPEAKE ENERGY CORP	76,618.	84,250.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,671,932.	4,628,347.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 5

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
4-H FAIR (CORNELL COOP EXTENSION OF PUTNAM COUNTY) 1 GENEVA ROAD BREWSTER, NY 10509	NONE GENERAL PURPOSE	PUBLIC CHARITY	
BATYA-FRIEND OF UNITED HATZALAH 175 EAST 96TH ST, STE 14D NEW YORK, NY 10128	NONE GENERAL PURPOSE	PUBLIC CHARITY	15,000.
BROOKLYN BUREAU OF COMMUNITY SERVICE 285 SCHERMERHORN STREET BROOKLYN, NY 11217	NONE GENERAL PURPOSE	PUBLIC CHARITY	
CITY MEALS ON WHEELS 355 LEXINGTON AVE NEW YORK, NY 10017	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.
COVENANT HOUSE 460 W. 41ST ST. NEW YORK, NY 10036	NONE GENERAL PURPOSE	PUBLIC CHARITY	
D.M.K. JR MEMORIAL FUND P.O. BOX 554 CARMEL, NY 10512	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.
DOE FUND 232 E. 84TH STREET NEW YORK, NY 10028	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.

FRIENDS OF GREEN CHIMNEYS 400 DOANSBURG RD. BREWSTER, NY 10509	NONE GENERAL PURPOSE	PUBLIC CHARITY	
FRIENDS OF REFUGEES OF EASTERN EUROPE 1383 PRESIDENT STREET BROOKLYN, NY 11213	NONE GENERAL PURPOSE	PUBLIC CHARITY	
GOODWILL OF GREATER NY & NORTHERN NJ 4-21 27TH AVE ASTORIA, NY 11102	NONE GENERAL PURPOSE	PUBLIC CHARITY	500.
GUIDING EYES FOR THE BLIND, INC. 611 GRANITE SPRING ROAD YORKTOWN HEIGHTS, NY 10598	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.
HOLE IN THE WALL GANG CAMP FUND 565 ASHFORD CENTER ROAD ASHFORD, CT 06278	NONE GENERAL PURPOSE	PUBLIC CHARITY	2,000.
HOSPICE, INC 374 VIOLET AVE POUGHKEEPSIE, NY 12601	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.
ISRAEL CANCER RESEARCH FUND 1290 AVENUE OF THE AMERICAS NEW YORK, NY 10104	NONE GENERAL PURPOSE	PUBLIC CHARITY	
ISRAEL RESCUE AND HATZALAH 175 W. 76TH ST NEW YORK, NY 10023	NONE GENERAL PURPOSE	PUBLIC CHARITY	
JEWISH GUILD FOR THE BLIND 15 W. 65TH ST NEW YORK, NY 10023	NONE GENERAL PURPOSE	PUBLIC CHARITY	500.
JEWISH MUSEUM 1109 FIFTH AVE NEW YORK, NY 10028	NONE GENERAL PURPOSE	PUBLIC CHARITY	

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LAKE CARMEL FIRE DEPARTMENT P.O. BOX 456 CARMEL, NY 10512	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.
LEUKEMIA AND LYMPHOMA SOCIETY 300 RESEARCH PKWY MERIDAN, CT 06450	NONE GENERAL PURPOSE	PUBLIC CHARITY	2,000.
LIGHTHOUSE, INC. 111 E. 59TH ST NEW YORK, NY 10022	NONE GENERAL PURPOSE	PUBLIC CHARITY	5,000.
MADONNA HEIGHTS/SCO FAMILY OF SERVICES 151 BURRS LANE DIX HILLS, NY 11746	NONE GENERAL PURPOSE	PUBLIC CHARITY	
MAKE A WISH FOUNDATION 828 SOUTH BROADWAY TARRYTOWN, NY 10591	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.
MULTIPLE SCLEROSIS RESEARCH 521 W. 57TH STREET NEW YORK, NY 10019	NONE GENERAL PURPOSE	PUBLIC CHARITY	2,000.
NATIONAL MULTIPLE SCLEROSIS 30 W. 26TH STREET NEW YORK, NY 10010	NONE GENERAL PURPOSE	PUBLIC CHARITY	
NY BOARD OF RABBIS/PASSOVER CAMPAIGN 136 EAST 39TH STREET NEW YORK, NY 10016	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.
NYU MEDICAL CENTER - DEPT OF UROLOGY 550 FIRST AVE NEW YORK, NY 10016	NONE GENERAL PURPOSE	PUBLIC CHARITY	125,000.
PALM BEACH ORTHODOX SYNAGOGUE 120 NORTH COUNTY ROAD PALM BEACH, FL 33480	NONE GENERAL PURPOSE	PUBLIC CHARITY	

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PARKINSON'S DISEASE FOUNDATION, NYC 710 W. 168TH STREET NEW YORK, NY 10032	NONE GENERAL PURPOSE	PUBLIC CHARITY	500.
PUTNAM ASSN. FOR RETARDED CHILDREN 31 INTERNATIONAL BLVD BREWSTER, NY 10509	NONE GENERAL PURPOSE	PUBLIC CHARITY	500.
PUTNAM COUNTY HUMANE SOCIETY P.O. BOX 297 CARMEL, NY 10512	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.
PUTNAM HOSPITAL CENTER 670 STONELEIGH AVE CARMEL, NY 10512	NONE GENERAL PURPOSE	PUBLIC CHARITY	10,000.
RE'UTH 390 5TH AVE, STE 900 NEW YORK, NY 10018	NONE GENERAL PURPOSE	PUBLIC CHARITY	500.
RECORDING FOR THE BLIND & DYSLEXIC 20 ROSZEL RD PRINCETON, NJ 08540	NONE GENERAL PURPOSE	PUBLIC CHARITY	500.
RONALD MCDONALD HOUSE OF NY 405 E. 73RD STREET NEW YORK, NY 10021	NONE GENERAL PURPOSE	PUBLIC CHARITY	
SIMON WIESENTHAL CENTER 9760 WEST PICO BLVD LOS ANGELES, CA 90035	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.
TEMPLE BETH SHALOM RD 10 BOX 245 MAHOPAC, NY 10541	NONE GENERAL PURPOSE	PUBLIC CHARITY	
YESHIVAT MIKDASH MELCH 801 AVENUE I BROOKLYN, NY 11230	NONE GENERAL PURPOSE	PUBLIC CHARITY	

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ALBERT EINSTEIN COLLEGE OF MEDICINE 1300 MORRIS PARK AVE BRONX, NY 10461	NONE GENERAL PURPOSE	PUBLIC CHARITY	500.
AMERICAN DIABETES ASSOCIATION (SERVING NY) P.O. BOX 97136 WASHINGTON, DC 20090	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.
B'NAI BRITH FOUNDATION 801 2ND AVE, 14TH FL NEW YORK, NY 10017	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,500.
BRAIN TUMOR FOUNDATION 1350 AVE OF AMERICAS, STE 1200 NEW YORK, NY 10019	NONE GENERAL PURPOSE	PUBLIC CHARITY	5,000.
BREAST CANCER RESEARCH FOUNDATION 60 E 56TH STREET NEW YORK, NY 10022	NONE GENERAL PURPOSE	PUBLIC CHARITY	10,000.
EPILEPSY FOUNDATION P.O. BOX 96546 WASHINGTON, DC 20007	NONE GENERAL PURPOSE	PUBLIC CHARITY	500.
FIDELCO GUIDE DOG FOUNDATION 103 OLD IRON ORE RD BLOOMFIELD, CT 06002	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.
FREINDS OF KAREN 118 TITCUS ROAD PURDYS, NY 10578	NONE GENERAL PURPOSE	PUBLIC CHARITY	2,500.
ST. JUDE'S CHILDREN RESEARCH CENTER P.O. BOX 1818 MEMPHIS, TN 38101	NONE GENERAL PURPOSE	PUBLIC CHARITY	3,000.
TOMORROWS CHIKDREN'S FUND 39 PROSPECT AVE HACKENSACK, NJ 07601	NONE GENERAL PURPOSE	PUBLIC CHARITY	1,000.

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IUJA-FEDERATION OF NEW YORK
130 E. 59TH ST NEW YORK, NY
10002

NONE
GENERAL PURPOSE

PUBLIC
CHARITY

1,000.

U.S. HOLOCAUST MEMORIAL MUSEUM
P.O. BOX 90988 WASHINGTON, DC
20090

NONE
GENERAL PURPOSE

PUBLIC
CHARITY

500.

WORLD JEWISH CONGRESS
P.O. BOX 90400 WASHINGTON, DC
20090

NONE
GENERAL PURPOSE

PUBLIC
CHARITY

500.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

202,000.

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

▶ File a separate application for each return.

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

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

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

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

Type or print File by the due date for filing your return. See instructions	Name of Exempt Organization J WEINSTEIN FOUNDATION, INC.	Employer identification number 11-6003595
	Number, street, and room or suite no. If a P.O. box, see instructions ROCKRIDGE FARM 961 ROUTE 52	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions CARMEL, NY 10512	

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

- | | | |
|---|---|------------------------------------|
| ☐ Form 990 | ☐ Form 990-T (corporation) | ☐ Form 4720 |
| ☐ Form 990-BL | ☐ Form 990-T (sec. 401(a) or 408(a) trust) | ☐ Form 5227 |
| ☐ Form 990-EZ | ☐ Form 990-T (trust other than above) | ☐ Form 6069 |
| ☒ Form 990-PF | ☐ Form 1041-A | ☐ Form 8870 |

TAXPAYER

- The books are in the care of ▶ **ROCKRIDGE FARM 961 ROUTE 52 - CARMEL, NY 10512**
Telephone No ▶ **845-225-7647** FAX No. ▶ _____
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
▶ ☒ calendar year **2009** or
▶ ☐ tax year beginning _____, and ending _____

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	8,762.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	762.
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	8,000.

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