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

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

, 2009, and ending

G Check all that apply

 Initial return  Initial Return of a former public charity  
 Amended return  Address change  Name change

Final return

Use the  
IRS label.  
Otherwise,  
print  
or type.  
See Specific  
Instructions.MICHAEL AND SARAH MARTON FAMILY  
FOUNDATION  
3720 INDEPENDENCE AVENUE  
RIVERDALE, NY 10463

A Employer identification number

13-3325263

B Telephone number (see the instructions)

201-670-1414

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 foundationI Fair market value of all assets at end of year  
(from Part II, column (c), line 16) J Accounting method  Cash  Accrual  
 Other (specify) ► \$ 760,681. (Part I, column (d) must be on cash basis)
**Part I** Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions))
 

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
REVENUE	1 Contributions, gifts, grants, etc, received (att sch)				
	2 Ck ► <input checked="" type="checkbox"/> if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	29,396.	29,396.	29,396.	
	4 Dividends and interest from securities	7,109.	7,109.	7,109.	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)				RECEIVED
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				OCT 18 2010
	b Less Cost of goods sold				
	c Gross profit/(loss) (att sch)				OGDEN, UT
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	36,505.	36,505.	36,505.	
ADMINISTRATIVE EXPENSES AND EXPENSES	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch) SEE ST 1	1,600.	800.	800.	
	c Other prof fees (attach sch)				
	17 Interest				
	18 Taxes (attach schedule)(see instr) SEE STM 2	110.	55.	55.	
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	1,710.	855.	855.	
	25 Contributions, gifts, grants paid STM 3	38,543.			38,543.
	26 Total expenses and disbursements. Add lines 24 and 25	40,253.	855.	0.	39,398.
	27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements	-3,748.			
	b Net investment income (if negative, enter 0)		35,650.		
	c Adjusted net income (if negative, enter 0)			36,505.	

Part II	Balance Sheets	Attached schedules and amounts in the description column should be for end of year amounts only (See instructions.)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash — non-interest-bearing		26,566.	2,623.	2,623.
	2 Savings and temporary cash investments		150,715.	32.	32.
	3 Accounts receivable	►			
	Less allowance for doubtful accounts	►			
	4 Pledges receivable	►			
	Less. allowance for doubtful accounts	►			
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)				
	7 Other notes and loans receivable (attach sch)	►			
	Less. allowance for doubtful accounts	►			
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments — U.S. and state government obligations (attach schedule)	STATEMENT 4	106,563.	101,344.	101,344.
	b Investments — corporate stock (attach schedule)	STATEMENT 5	139,880.	174,297.	196,651.
	c Investments — corporate bonds (attach schedule)	STATEMENT 6	312,438.	454,118.	460,031.
	11 Investments — land, buildings, and equipment basis	►			
	Less accumulated depreciation (attach schedule)	►			
	12 Investments — mortgage loans				
	13 Investments — other (attach schedule)				
	14 Land, buildings, and equipment basis	►			
	Less accumulated depreciation (attach schedule)	►			
	15 Other assets (describe ► )				
	16 Total assets (to be completed by all filers — see instructions. Also, see page 1, item 1)		736,162.	732,414.	760,681.
LIABILITIES	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, & other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe ► )				
NET ASSETS	23 Total liabilities (add lines 17 through 22)		0.	0.	
	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.	► <input checked="" type="checkbox"/>			
NET ASSETS	24 Unrestricted		736,162.	732,414.	
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.	► <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds				
	28 Paid-in or capital surplus, or land, building, and equipment fund				
	29 Retained earnings, accumulated income, endowment, or other funds				
	30 Total net assets or fund balances (see the instructions)		736,162.	732,414.	
	31 Total liabilities and net assets/fund balances (see the instructions)		736,162.	732,414.	

## 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	736,162.
2 Enter amount from Part I, line 27a	2	-3,748.
3 Other increases not included in line 2 (itemize) ►	3	
4 Add lines 1, 2, and 3	4	732,414.
5 Decreases not included in line 2 (itemize) ►	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	732,414.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)			(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a N/A					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Column (h)) gain minus column (k), but not less than -0- or Losses (from column (h))	
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss). <span style="border: 1px solid black; padding: 0 10px;">If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</span>			2		
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):  If gain, also enter in Part I, line 8, column (c) (see the instructions). If (loss), enter -0- in Part I, line 8			3		

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No

If 'Yes,' the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2008	43,134.	708,429.	0.060887
2007	41,835.	729,670.	0.057334
2006	43,868.	756,758.	0.057968
2005	48,277.	731,979.	0.065954
2004	32,418.	715,797.	0.045289

- 2 Total of line 1, column (d) 2 0.287432
- 3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years 3 0.057486
- 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 4
- 5 Multiply line 4 by line 3 5
- 6 Enter 1% of net investment income (1% of Part I, line 27b) 6 357.
- 7 Add lines 5 and 6 7 357.
- 8 Enter qualifying distributions from Part XII, line 4 8 39,398.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

**Part VI** | **Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see the instructions)**

1 a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter 'N/A' on line 1.	
Date of ruling or determination letter ----- (attach copy of letter if necessary - see instr.)		
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	1 357.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2 0.
3	Add lines 1 and 2	3 357.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4 0.
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	5 357.
6	<b>Credits/Payments.</b>	
a	2009 estimated tax pmts and 2008 overpayment credited to 2009	6a 394.
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	7 394.
8	Enter any <b>penalty</b> 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 0.
10	<b>Overpayment</b> If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10 37.
11	Enter the amount of line 10 to be Credited to 2010 estimated tax ►	37. Refunded ► 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	
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	X	
If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
1c	Did the foundation file <b>Form 1120-POL</b> 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?	X	
If 'Yes,' attach a detailed description of the activities			
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 <b>Form 990-T</b> for this year?	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	X	
If 'Yes,' attach the statement required by General Instruction T.			
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?			
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XIV	X	
8a	Enter the states to which the foundation reports or with which it is registered (see the 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	

**Part VII-A | Statements Regarding Activities Continued**

11		X
12		X
13	X	
Website address	► N/A	
14	The books are in care of ► MICHAEL MARTON	Telephone no. ► 201-670-1414
	Located at ► SAME	ZIP + 4 ►
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 ► 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
1b	If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? Organizations relying on a current notice regarding disaster assistance check here	► <input type="checkbox"/>	N/A
1c	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?		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))		
2a	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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	If 'Yes,' list the years ► 20__ , 20__ , 20__ , 20__		
2b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement – see the instructions)		N/A
3a	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20__ , 20__ , 20__ , 20__		
3b	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
3b	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
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
4b	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?		X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**

5a During the year did the foundation pay or incur any amount to:

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

 Yes  No

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

 Yes  No

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

 Yes  No

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

 Yes  No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

 Yes  Nob If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b 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.

6b 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?

7b N/A

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
MICHAEL MARTON 3720 INDEPENDENCE AVE. RIVERDALE, NY 10463	FND MANAGER 0	0.	0.	0.
-----	-----	-----	-----	-----
-----	-----	-----	-----	-----
-----	-----	-----	-----	-----
-----	-----	-----	-----	-----
-----	-----	-----	-----	-----
-----	-----	-----	-----	-----

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

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

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

►

0

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

3 Five highest-paid independent contractors for professional services – (see instructions). If none, enter 'NONE.'

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

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

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.

1	N/A	
2		
3		
4		

**Part IX.B** Summary of Program-Related Investments (see instructions)

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

1	<u>N/A</u>
2	

All other program-related investments. See instructions

3

**Total. Add lines 1 through 3**

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**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

- 1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes
- a Average monthly fair market value of securities
- b Average of monthly cash balances
- c Fair market value of all other assets (see instructions)
- d **Total** (add lines 1a, b, and c)
- e Reduction claimed for blockage or other factors reported on lines 1a and 1c  
(attach detailed explanation)
- 1e
- 2 Acquisition indebtedness applicable to line 1 assets
- 3 Subtract line 2 from line 1d
- 4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3  
(for greater amount, see instructions)
- 5 **Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4
- 6 **Minimum investment return.** Enter 5% of line 5

1a	
1b	
1c	
1d	0.
1e	
2	
3	
4	
5	0.
6	0.

**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
- 2a Tax on investment income for 2009 from Part VI, line 5
- b Income tax for 2009. (This does not include the tax from Part VI )
- c Add lines 2a and 2b
- 3 Distributable amount before adjustments Subtract line 2c from line 1
- 4 Recoveries of amounts treated as qualifying distributions
- 5 Add lines 3 and 4
- 6 Deduction from distributable amount (see instructions)
- 7 **Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1

1	
2a	357.
2b	
2c	357.
3	-357.
4	
5	-357.
6	
7	0.

**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
- b Program-related investments — total from Part IX-B
- 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes
- 3 Amounts set aside for specific charitable projects that satisfy the
- a Suitability test (prior IRS approval required)
- b Cash distribution test (attach the required schedule)
- 4 **Qualifying distributions** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4
- 5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)
- 6 **Adjusted qualifying distributions.** Subtract line 5 from line 4

1a	39,398.
1b	
2	
3a	
3b	
4	39,398.
5	357.
6	39,041.

**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				0.
2 Undistributed income, if any, as of the end of 2009:				0.
a Enter amount for 2008 only				0.
b Total for prior years 20 __, 20 __, 20 __			0.	
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005 12,400.				
c From 2006 6,738.				
d From 2007 6,064.				
e From 2008 8,525.				
f Total of lines 3a through e 33,727.				
4 Qualifying distributions for 2009 from Part XII, line 4. ► \$ 39,398.				0.
a Applied to 2008, but not more than line 2a				
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 0.				
e Remaining amount distributed out of corpus 39,398.				
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5 73,125.				
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 instructions 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) (see instructions) 0.				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions) 0.				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 73,125.				
10 Analysis of line 9				
a Excess from 2005 12,400.				
b Excess from 2006 6,738.				
c Excess from 2007 6,064.				
d Excess from 2008 8,525.				
e Excess from 2009 39,398.				

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

N/A

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

## 1. Information Regarding Foundation Managers:

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

**NONE**

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs:**

Check here ▶  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed.

**b** The form in which applications should be submitted and information and materials they should include.

### c. Any submission deadlines.

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors.

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i>				
<b>Total</b>				► 3a
<i>b Approved for future payment</i>				
<b>Total</b>				► 3b

## Part XVI-A Analysis of Income-Producing Activities

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	29,396.	
4 Dividends and interest from securities			14	7,109.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				36,505.	
13 Total. Add line 12, columns (b), (d), and (e)					36,505.

(See worksheet in the instructions for line 13 to verify calculations.)

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

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



**STATEMENT 1**  
**FORM 990-PF, PART I, LINE 16B**  
**ACCOUNTING FEES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	\$ 1,600.	\$ 800.	\$ 0.	\$ 800.
TOTAL	<u>\$ 1,600.</u>	<u>\$ 800.</u>	<u>\$ 0.</u>	<u>\$ 800.</u>

**STATEMENT 2**  
**FORM 990-PF, PART I, LINE 18**  
**TAXES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
NYS DEPT OF LAW	\$ 110.	\$ 55.	\$ 0.	\$ 55.
TOTAL	<u>\$ 110.</u>	<u>\$ 55.</u>	<u>\$ 0.</u>	<u>\$ 55.</u>

**STATEMENT 3**  
**FORM 990-PF, PART I, LINE 25**  
**CONTRIBUTIONS, GIFTS, AND GRANTS**

CASH GRANTS AND ALLOCATIONS

CLASS OF ACTIVITY:	CHARITY
DONEE'S NAME:	(SEE ATTACHED SCHEDULE)
DONEE'S ADDRESS:	(SEE ATTACHED SCHEDULE)
RELATIONSHIP OF DONEE:	VARIOUS,
ORGANIZATIONAL STATUS OF DONEE:	N/A
AMOUNT GIVEN:	CHARITABLE
	\$ 38,543.
	<u>TOTAL \$ 38,543.</u>

**STATEMENT 4**  
**FORM 990-PF, PART II, LINE 10A**  
**INVESTMENTS - U.S. AND STATE GOVERNMENT OBLIGATIONS**

<u>U. S. GOVERNMENT OBLIGATIONS</u>	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
FEDERAL HOME LN MTG CORP DEBT	MKT VAL	\$ 101,344.	\$ 101,344.
		<u>\$ 101,344.</u>	<u>\$ 101,344.</u>
	TOTAL	<u>\$ 101,344.</u>	<u>\$ 101,344.</u>

**STATEMENT 5**  
**FORM 990-PF, PART II, LINE 10B**  
**INVESTMENTS - CORPORATE STOCKS**

<u>CORPORATE STOCKS</u>	<u>VALUATION METHOD</u>	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
GENERAL MARITIME CORP	COST	\$ 1,745.	\$ 1,745.
ASTRAZENECA	MKT VAL	10,829.	14,082.
BANK OF AMERICA	MKT VAL	9,060.	12,048.
BRISTOL MYERS SQUIBB CO	MKT VAL	42,450.	50,500.
CITIGROUP INC	MKT VAL	3,433.	3,310.
CONSOLIDATED EDISON CO	COST	60,000.	60,195.
GENERAL ELECTRIC CO	MKT VAL	3,342.	4,539.
PFIZER INC	MKT VAL	4,345.	5,457.
PHILIP MORRIS INC	MKT VAL	10,658.	14,457.
SUBURBAN PROPANE LP	MKT VAL	12,435.	14,124.
WELLS FARGO CO	MKT VAL	16,000.	16,194.
	TOTAL	<u>\$ 174,297.</u>	<u>\$ 196,651.</u>

**STATEMENT 6**  
**FORM 990-PF, PART II, LINE 10C**  
**INVESTMENTS - CORPORATE BONDS**

<u>CORPORATE BONDS</u>	<u>VALUATION METHOD</u>	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
HSBC FIN CORP	COST	\$ 101,000.	\$ 101,791.
HSBC FIN CORP	COST	103,000.	103,077.
CONSOLIDATED EDISON	MKT VAL	101,397.	108,851.
SUNOCO INC	MKT VAL	100,000.	101,103.
PRUDENTIAL FINL INC	MKT VAL	48,721.	45,209.
	TOTAL	<u>\$ 454,118.</u>	<u>\$ 460,031.</u>

<u>DATE</u>	<u>DONEE</u>	<u>CK#</u>	<u>AMOUNT</u>
1. 9. 09	RIVERDALE JEWISH COUNCIL 3720 INDEPENDENCE AVE BRONX NY 10463	331	100-
1. 15.09	MOSROS SANDASURE 5018 OLD NEW YORK RD BROOKLYN NY 11204	332	72-
1. 15.09	YESHIVAT BEZER INSTITUTION <del>5000 21ST FLOOR BROOKLYN RD</del> 4305 15TH AVE BROOKLYN NY 11209	333	72
1. 15.09	4747 CHARITYS 4747 COLLINS AVE MIAMI BEACH FL 33140	334	250-
	VOID	<del>335</del>	—
2 3 09	BIKUR CHOLIM GUARDIAN OF THE SICK P O BOX 190369 BROOKLYN NY	336	72-
3 10 09	4747 CHARITYS 4747 COLLINS AVE MIAMI BEACH FL 33140	337	90-
2 14 09	CONG AVNEI PINCHAS 1683 59TH STREET BROOKLYN NY 11204	338	118-
2 15	RIVERDALE JEWISH COUNCIL 5625 ARLINGTON AVE BRONX NY 10471	339	250-

2 18 09	GRAENUM BERGER 2432 GRAND CONCOURSE #502 BRONX NY 10458	340	108-
3 1 09	<del>XXXXXXXXXXXX</del> <del>XXXX</del> <del>XXXXXX</del> <del>XXXXXX</del>	<del>XXXX</del>	
3 1 09	NISHMAS YISROEL AMERICAN FRIENDS 680-6 WEST 245 <sup>th</sup> STR BRONX NY 10471	342	138-
3 1 09	SAR ACADEMY 655 244 ST BRONX NY 10471	343	150-
3 10 09	4747 CHARITYS 4747 COLLINS AVE MIAMI BEACH FL 33140	344	304-
3 10 09	EMUNAH OF AMERICA SEVEN PENN PLAZA NY NY 10001	345	36-
3 10 09	CHILDREN GALERIES for JEWISH CULTURE 346 515 WEST 20 <sup>th</sup> STR NY NY 10011	346	100-
3 10 09	UNITED LUBAVICHER JESHIVAH 841 OCEAN PKWY BROOKLYN NY 11230	347	227

3 10 09	YESHIVAT H SHALAVIM 144 EAST 29 <sup>th</sup> STR BROOKLYN NY 11210	348	250-
3 10 09	RIVERDALE JEWISH CENTER 3700 INDEPENDENCE AVE BRONX NY 10463	349	500-
3 10 09	4747 CHARITYS 4747 COLLINS AVE MIAMI BEACH FL 33140	350	36-
3 10 09	<del>XXXXXX XXXXX</del> <del>XXXXXXXX XXXXXXXX</del> <del>XX XXXXXXXX</del>	<del>XXXX</del>	<del>XXXXXX</del>
3 10 09	NATIONAL JEWISH OUTREACH 989 SIXTH AVE NY NY 10018	352	
4 6 09	CHABAD OF SOUTH BROWARD 1295 E HALLANDALE BEACH BLVD HALLANDALE FL 33009	353	100-
4 6 09	4747 CHARITYS 4747 COLLINS AVE MIAMI BEACH FL 33140	354	126-
4 24	4747 CHARITYS 4747 COLLINS AVE MIAMI BEACH FL 33140	355	130-

5 3 09

ALEPH SOC  
25 W 45<sup>th</sup> STR 11405  
NY NY 10036

356

401-

5 3 09

SEWIS<sup>H</sup> COMM COUNCIL PP  
2157 HOLLAND AVE  
BRONX NY 10463

357

100

5 3 09

4747 CHARITIES  
4747 COLLINS AVE  
MIAMI BEACH FL 33140

358

25c

5 3 09

CHAI LIFE  
151 W 30<sup>th</sup> STR  
NY NY 10001

359

180

5 3 09

AMERICAN FRIENDS OF NISMAF  
271 MADISON AVE  
NY NY 10016

360

180

5 15 09

~~THE FRIENDS~~

~~361~~

~~362~~

5 28 09

RIVERDALE Y  
5625 W ARLINGTON AVE  
BRONX NY 10471

362

180

5 28 09

YESHIVA UNIVERSITY WOMEN  
500 WEST 185<sup>th</sup> ST  
NYC NY 10033

363

325

5

6 29 09	RIVERDALE JEWISH CENTER 3700 INDEPENDENCE AVE BRONX NY 10463	364	1500
6 30 09	VOID	<del>365</del>	—
6 30 09	NESTY 11 BROADWAY 14 <sup>TH</sup> FL NY NY 10004	366	50
6 30 09	EMUNAH OF AMERICA 7 PENN PLAZA NY NY 10001	367	36
7/20/09	RIVERDALE SENIOR SERVICE 2600 NETHERLAND AVE BRONX NY 10463	368	150
8 3 09	KBW HEBREW DAY SCHOOL SULLIVAN County KIAMISAA LAKE NY 12751	369	150
8 3 09	RIVERDALE JEWISH CENTER 3700 INDEPENDENCE AVE BRONX NY 10463	370	1500
8 18 09	VOID	<del>371</del>	—
8 18 09	BIKUR CHOLIM OF BROOKLYN P O BX 190396 BROOKLYN NY 11219	372	138

8 29 09	AMERICAN SOCIETY OF YAO VASNEM PO BOX 17305 MILWAUKEE WI 53217	373	250-
8 28 09	ORTHODOX UNION ELEVEN BROADWAY NY NY 10004	374	100-
8 28 09	E2RAS TORAH 235 EAST BROADWAY NY NY 10002	375	100-
8 28 09	COALITION FOR JEWISH CONCERN AMCHA 3700 HENRY HUDSON PKWY BRONX NY 10463	376	180-
8 28 09	CHABAD ON THE OCEAN 7 SEACREST PKWY HOLLYWOOD FL 33019	377	227-
8 28 09	RIVERDALE JEWISH CENTER 3700 INDEPENDENCE AVE BRONX NY 10462	378	25-
8 28 09	CHILDREN GALLERIES OF JEWISH CULTURE 515 WEST 20TH ST NY NY 10011	379	100-
8 28 09	BNAI BRITH PO BOX 96729 WASHINGTON DC 20090	380	<del>227</del> 103

9 109 LONG NEW SQUARE 381 298-  
10 JEFFERSON AVE  
NEW SQUARE NY

9 3 09 CHABAD OF SOUTH BROWARD 382 227-  
1295 HALLANDALE BEACH BLVD  
HALLANDALE FL 33009

9 3 09 HISACHDIS AUREICHIM CHASIDIC SQEAR 383 25-  
701 WILSON AVE  
SPRING VALLEY

9 3 09 YESHIVA KATANA DSQUARE 384  
35 WASHINGTON AVE  
SPRINGVALLEY NY 10977

9 3 09 BRONX JEWISH COMM COUNCIL 385 260-  
29030 WALLACE AVE  
BRONX NY 10467

9 13 09 VOID ~~386~~ -

9 13 09 YESHIVA SAMSON RAPHAEL AIRSCH 387 500-  
3700 INDEPENDENCE AVE  
BRONX NY 10463

9 13 09 YESHIVA RABBI SAMSON RAPHAEL AIRSCH 388 ~~72~~  
100 BENETT AVE  
NY NY 10033 72

9 13 09	SAR ACADEMY 655 254 SFR BRONX NY 10471	389	1800-
9 21 09	AMERICAN FRIENDS OF YAD ELIEZER 1102 EAST 26 <sup>TH</sup> SFR BROOKLYN NY 11210	390	54
9 21 09	<del>XXXXXXXXXXXX XXXXXXXX</del>	<del>XXXX</del>	<del>XXXX</del>
9 21	<del>XXXXXXXXXXXX XXXXXXXX</del>	<del>XXXX</del>	<del>XXXX</del>
9 21	CONG TORAH YECHESSED MANASH 629 W 239 <sup>TH</sup> ST BRONX NY 10463	393	250
9.2 09	MEKOROT 3616 HENRY HUBSON PEWY BRONX NY 10463	394	250-
9.2 09	FRISCH HEBREW SCHOOL 120 W CENTURY RD PARAMUS NJ 07652	395	2500
10 1 09	CONG YECHESKEL SCHRAGA 4175 COLLINS AVE MIAMI BEACH FL 33140	396	100-
10 1 09	YESHIVA UNIVERSITY RIETS 500 W 185 <sup>ST</sup> NY NY 10033	397	2500

10.5.09

4747 CHARITYS  
4747 COLLINS AVE  
MIAMI BEACH FL 33140

398

56-

10.5

TOLDOS AVRAHAM YIDEOK  
P O BOX 191202  
BROOKLYN NY 11219

400

100-

10.19.09

YESHIVA CHAIM BERLIN  
1605 CONEY ISLAND AVE  
BROOKLYN NY 11230

401

1200

11.2.09

MEGIVDA TEFERET JERUSALEM 402 250-  
145 EAST BROADWAY  
NYC NY

11.2.09

HEBREW FREE BURIAL ASS  
224 WEST 35 STR RM 300  
NY NY 10001

403

100-

11.2.09

TZIVOS HASHEM  
792 EASTERN PKWY  
BROOKLYN NY 11213

404

180

11.2.09

AMERICAN COMMITTEE SHARAH TZEDER 405 500  
49 WEST 45 STR 11FL  
NY NY 10036

11/2.09

11/2/09	PRESBYTERIAN YESHIVA 1840 52 <sup>nd</sup> ST BROOKLYN NY 11204	406	100-
11.11.09	YESHIVA OF TELSHE ALUMNI 4904 INDEPENDENCE AVE RIVERDALE NY 10471	407	500-
11.16.09	R.VERDALE JEWISH CENTER 3700 INDEPENDENCE AVE BRONX NY 10463	408	3,000-
11/28	THE FRISCH SCHOOL 120 W CENTURY RD PARAMUS NJ 07652	409	1,000-
12/2/09	MERKAZ HAKOLILIM 5 ROSEVELT AVE NEW SQUARE NY 10477	410	36-
12/2/09	YOUNG ISRAEL YONKERS 61 FANSTAW AVE YONKERS NY 10705	411	100-
12/5/09	BIKUR CHOLIM OF BOROUGH PARK 5216 117 AVE BROOKLYN NY 11219	412	100-
12/13/09	AHAVATH TORAH 1683 59 STREET BROOKLYN NY 11204	413	100-

12-14 09 RIVERDALE JEWISH CENTER 414 12,500-  
3700 INDEPENDENCE AVE.  
BRONX NY 10463

12 28 09 MATAN 415 180-

TOTAL 38543