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Return of Private Foundation

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Serviceor Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

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

ISERMANN FAMILY FOUNDATION, INC.

C/O F. PETERMANN

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

21 HIGHFIELD LANE

Room/suite

City or town, state, and ZIP code

RUTHERFORD, NJ 07070

A Employer identification number

22-2615361

B Telephone number

(201) 712-9800

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, col. (c), line 16)

\$ 8015076. (Part I, column (d) must be on cash basis.)

J Accounting method: ☒ Cash ☐ Accrual☐ Other (specify)

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				
	4 Dividends and interest from securities	169432.	169432.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-454737.			Statement 1
	b Gross sales price for all assets on line 6a	2755975.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
Operating and Administrative Expenses	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	-285305.	169432.		
	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	11300.	5650.		5650.
	c Other professional fees Stmt 3	31739.	31739.		0.
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
22 Printing and publications					
23 Other expenses Stmt 4	25.	25.		0.	
24 Total operating and administrative expenses. Add lines 13 through 23	43064.	37414.		5650.	
25 Contributions, gifts, grants paid	342780.			342780.	
26 Total expenses and disbursements. Add lines 24 and 25	385844.	37414.		348430.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-671149.				
b Net investment income (if negative, enter -0-)		132018.			
c Adjusted net income (if negative, enter -0-)			N/A		

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ISERMANN FAMILY FOUNDATION, INC.

Form 990-PF (2009)

C/O F. PETERMANN

22-2615361

Page 2

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		1351119.	1443147.	1443147.
	3	Accounts receivable ▶ 3420.				
		Less: allowance for doubtful accounts ▶		1150.	3420.	3420.
	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 Stmt 5		370964.	423506.	420548.
	b	Investments - corporate stock Stmt 6		4937632.	3440676.	5310080.
	c	Investments - corporate bonds Stmt 7		105671.	784638.	837881.
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)		6766536.	6095387.	8015076.	
Liabilities	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				
	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		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		6766536.	6095387.	
30	Total net assets or fund balances		6766536.	6095387.		
31	Total liabilities and net assets/fund balances		6766536.	6095387.		

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	6766536.
2	Enter amount from Part I, line 27a	2	-671149.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	6095387.
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	6095387.

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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 PUBLICLY TRADED SECURITIES				
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 2755975.		2899744.	-143769.
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			-143769.
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	-143769.
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	434833.	8545522.	.050884
2007	472462.	9286608.	.050876
2006	374000.	8281143.	.045163
2005	328468.	6838842.	.048030
2004	317220.	6709461.	.047280

2 Total of line 1, column (d)	2	.242233
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	.048447
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	7232609.
5 Multiply line 4 by line 3	5	350398.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1320.
7 Add lines 5 and 6	7	351718.
8 Enter qualifying distributions from Part XII, line 4	8	348430.

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)		1	2640.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	2640.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	2640.
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	4183.	
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	4183.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1543.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ☐ 1543. Refunded ☐ 0.	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 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) ☐ None		
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?	13	X	

Website address ► N/A

14 The books are in care of ► SECRETARY Telephone no. ► (201) 712-9800
 Located at ► 21 HIGHFIELD LANE, RUTHERFORD, NJ ZIP+4 ► 07070

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 <u>N/A</u> ☐	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? ☐ Yes ☒ No If "Yes," list the years ► _____		
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.) <u>N/A</u>	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.) <u>N/A</u>	3b	
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

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

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?

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
HOWARD ISERMANN 1299 N. TAMiami TRAIL, UNIT 827 SARASOTA, FL 34236	PRES. - TREAS.	0.00	0.	0.
BETTY ISERMANN 1299 N. TAMiami TRAIL, UNIT 827 SARASOTA, FL 34236	VICE PRES.	0.00	0.	0.
CAROL ISERMANN 15 HUTTON AVE. WEST ORANGE, NJ 07052	VICE PRES.	0.00	0.	0.
FREDERICK PETERMANN 21 HIGHFIELD LA RUTHERFORD, NJ 07070	SECY.	0.00	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 NONE	
	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 N/A	
2	
All other program-related investments. See instructions.	
3	
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	7342750.
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	7342750.
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	7342750.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	110141.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	7232609.
6	Minimum investment return. Enter 5% of line 5	6	361630.

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	361630.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2640.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2640.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	358990.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	358990.
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	358990.

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	348430.
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	348430.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	348430.

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				358990.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			182313.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 348430.				
a Applied to 2008, but not more than line 2a			182313.	
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				166117.
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).)	0.			0.
6 Enter the net total of each column as indicated below:	0.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
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				192873.
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	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

ISERMANN FAMILY FOUNDATION, INC.

Form 990-PF (2009)

C/O F. PETERMANN

22-2615361

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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)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2009	(b) 2008	(c) 2007	(d) 2006	

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test - enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

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

HOWARD ISERMANN

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:

Form 990-PF	Gain or (Loss) from Sale of Assets	Statement	1
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(a) Description of Property	Manner Acquired	Date Acquired	Date Sold
PUBLICLY TRADED SECURITIES			
(b) Gross Sales Price	(c) Cost or Other Basis	(d) Expense of Sale	(e) Deprec.
(f) Gain or Loss			
2755975.	3210712.	0.	0.
			-454737.
Capital Gains Dividends from Part IV			0.
Total to Form 990-PF, Part I, line 6a			-454737.

Form 990-PF	Accounting Fees	Statement	2
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
ACCOUNTING SVCS.	11300.	5650.		5650.
To Form 990-PF, Pg 1, ln 16b	11300.	5650.		5650.

Form 990-PF	Other Professional Fees	Statement	3
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
INVEST. MGMT.	31739.	31739.		0.
To Form 990-PF, Pg 1, ln 16c	31739.	31739.		0.

Form 990-PF	Other Expenses	Statement	4
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
MISCELLANEOUS	25.	25.		0.
To Form 990-PF, Pg 1, ln 23	25.	25.		0.

Form 990-PF	U.S. and State/City Government Obligations	Statement	5
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Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value
U.S. GOVT. OBLIG.	X		423506.	420548.
Total U.S. Government Obligations			423506.	420548.
Total State and Municipal Government Obligations				
Total to Form 990-PF, Part II, line 10a			423506.	420548.

Form 990-PF	Corporate Stock	Statement	6
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Description	Book Value	Fair Market Value
CORPORATE STOCK	3440676.	5310080.
Total to Form 990-PF, Part II, line 10b	3440676.	5310080.

Form 990-PF	Corporate Bonds	Statement	7
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Description	Book Value	Fair Market Value
CORPORATE BONDS	784638.	837881.
Total to Form 990-PF, Part II, line 10c	784638.	837881.

Form 990-PF	Grants and Contributions Paid During the Year	Statement 8
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Recipient Name and Address	Recipient Relationship and Purpose of Grant	Amount
ALL FAITHS FOOD BANK 8171 BLAIKIE CT SARASOTA, FL 34240	N/A GENERAL SUPPORT	5500.
AMEERICAN TECHNION SOCIETY 55 E. 59 ST. NEW YORK, NY 10022	N/A GENERAL SUPPORT	5000.
AMERICAN FRIENDS OF MAGEN DAVID ADOM 888 SEVENTH AVE NEW YORK, NY 10106	N/A GENERAL SUPPORT	2000.
ANTI DEFAMATION LEAGUE 605 THIRD AVE. NEW YORK, NY 10158	N/A GENERAL SUPPORT	1000.
ARTCENTER MANATEE 209 9TH ST.WEST BRADENTON, FL 34205	N/A GENERAL SUPPORT	5000.
ARTS UNBOUND 542 FREEMAN ST. ORANGE, NJ 07050	N/A GENERAL SUPPORT	1000.
CHILDREN FIRST, INC. 1723 N. ORANGE AVE. SARASOTA, FL 34234	N/A GENERAL SUPPORT	1000.
COEXISTENCE, INC. P.O.BOX 2559 SARASOTA, FL 34230	N/A GENERAL SUPPORT	200.

COMMUNITY CTR FOR DEAF & HARD HEARING 1750 17TH ST-BLDG F SARASOTA, FL 34237	N/A GENERAL SUPPORT	5000.
DOCTORS WITHOUT BORDERS 333 SEVENTH AVE. NEW YORK, NY 20001	N/A GENERAL SUPPORT	1000.
FLORIDA HOLOCAUST MUSEUM 55 FIFTH ST SOUTH ST PETERSBURG, FL 33701	N/A GENERAL SUPPORT	1000.
HABITAT FOR HUMANITY 1757 N. EAST AVE. SARASOTA, FL 34234	N/A GENERAL SUPPORT	5000.
INTERFAITH ALLIANCE FDN. 1212 NEW YORK AVE. NW WASHINGTON, DC 20005	N/A GENERAL SUPPORT	1000.
ISRAEL CHILDREN'S CENTERS 3275 W HILLSBORO BLVD. DEERFIELD BEACH, FL 33442	N/A GENERAL SUPPORT	2500.
JEWISH FAMILY & CHILDRENS SERVICE OF SAR. & MAN. 2688 FRUITVILLE RD SARASOTA, FL 34237	N/A GENERAL SUPPORT	10000.
JEWISH FED. OF SARASOTA-MANATEE 580 MCINTOSH RD. SARASOTA, FL 34232	N/A GENERAL SUPPORT	25000.
JEWISH FOUNDATION FOR THE RIGHTEOUS 305 SEVENTH AVE. NEW YORK, NY 10001	N/A GENERAL SUPPORT	1000.
JEWISH HSG. COUNCIL FDN. 1951 N, HONORE AVE. SARASOTA FL, FL 34235	N/A GENERAL SUPPORT	1000.

JEWISH NATIONAL FUND 42 E. 69 ST. NEW YORK, NY 10021	N/A GENERAL SUPPORT	2500.
LIBERTY SCIENCE CENTER 222 JERSEY CITY BLVD. JERSEY CITY, NJ 07305	N/A GENERAL SUPPORT	1000.
MARCH OF DIMES 1275 MAMARONECK AVE. WHITE PLAINS, NY 10605	N/A GENERAL SUPPORT	1000.
MENTAL HEALTH ASSN. OF ESSEX COUNTY, INC. 33 S. FULLERTON AVE. MONTCLAIR, NJ 07042	N/A GENERAL SUPPORT	5000.
MENTAL HEALTH COMMUNITY CENTERS, INC. 240B S. TUTTLE AVE. SARASOTA, FL 34237	N/A GENERAL SUPPORT	10000.
NEW COLLEGFE FOUNDATION, INC. 5800 BAY SHORE RD SARASOTA, FL 34243	N/A SCIENCE MEDAL PROGRAM	43800.
NEW JERSEY ANIMAL COALITION 298 WALTON AVE. SOUTH ORANGE, NJ 07079	N/A GENERAL SUPPORT	1000.
NEW YORK CITY POLICE FDN, INC. 555 FIFTH AVE. NEW YORK, NY 10017	N/A GENERAL SUPPORT	1000.
PARKINSON'S DISEASE FOUNDATION 1359 BROADWAY NEW YORK, NY 10018	N/A GENERAL SUPPORT	10000.
RENSSELAER POLYTECHNIC INSTITUTE HEDLEY BLDG.-110 8TH ST. TROY, NY 2180	N/A CAPITAL CAMPAIGN	50000.

RINGLING COLLEGE LIBRARY ASSN. P.O.BOX 4071 SARASOTA, FL 4230	N/A GENERAL SUPPORT	500.
RINGLING COLLEGE OF ART & DESIGN 2700 N. TAMiami TR. SARASOTA, FL 34237	N/A CONTINUING EDUCATION	20000.
SARASOTA FIREFIGHTERS BENEV. FD. SARASOTA, FL 34239	N/A GENERAL SUPPORT	1000.
SARASOTA MEMORIAL HEALTHCARE FDN., INC. 1515 S. OSPREY AVE. SARASOTA, FL 34239	N/A PSYCHIATRIC CENTER	40000.
SIMON WIESENTHAL CENTER 1399 S. ROXBURY DR. LOS ANGELES, CA 90035	N/A GENERAL SUPPORT	1000.
SOUTHERN POVERTY LAW CENTER 400 WASHINGTON AVE. MONTGOMERY, AL 36104	N/A GENERAL SUPPORT	1000.
SPECIAL OLYMPICS FLORIDA 1105 CITRUS TOWER BLVD. CLERMONT, FL 34711	N/A GENERAL SUPPORT	1000.
ST. BARNABAS HOSPICE CARE CENTER 95 OLD SHORT HILLS RD. WEST ORANGE, NJ 07039	N/A GENERAL SUPPORT	1000.
ST. BARNABAS MED. CTR. FDN. 94 OLD SHORT HILLS RD. WEST ORANGE, NJ 07039	N/A CANCER RESEARCH	25000.
SUNSHINE FOR DARKNESS 5700 GULF OF MEXICO DR. LONGBOAT KEY, FL 34228	N/A GENERAL SUPPORT	7780.

TEMPLE SHAREY TEFILO-ISRAEL 432 SCOTLAND RD. SOUTH ORANGE, NJ 07079	N/A CAPITAL CAMPAIGN		10000.
THE WELLNESS COMMUNITY 3900 CLARK RD SARASOTA, FL 34233	N/A GENERAL SUPPORT	+	1000.
THIRTEEN/WNET 450 W. 33D ST. NEW YORK, NY 10001	N/A GENERAL SUPPORT		2500.
TIDEWELL HOSPICE CARE 5955 RAND BLVD. SARASOTA, FL 34238	N/A GENERAL SUPPORT		1000.
UJA FEDERATION OF NEW YORK 130 EAST 59TH ST. NEW YORK, NY 10022	N/A GENERAL SUPPORT		10000.
UNICEF-UNITED STATES FUND 125 MAIDEN LANE NEW YORK, NY 10038	N/A GENERAL SUPPORT		1000.
UNITED WAY OF SARASOTA COUNTY 1445 2ND ST. SARASOTA, FL 34236	N/A GENERAL SUPPORT		10000.
VAN WEZEL FOUNDATION, INC. 777 N TAMIAMI TRAIL SARASOTA, FL 34236	N/A GENERAL SUPPORT		3500.
VIDEO ARCHIVES 1235 S TAMIAMI TRAIL SARASOTA, FL 34239	N/A GENERA; SUPPORT		1000.
WEDU 1300 NORTH BLVD. TAMPA, FL 33607	N/A GENERAL SUPPORT		5000.

ISERMANN FAMILY FOUNDATION, INC. C/O F.

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WINCHESTER GARDENS RES. ASSN. N/A
SCHOLARSHIP FD SCHOLARSHIP FUND
333 ELMWOOD AVE. MAPLEWOOD, NJ
07040

1000.

Total to Form 990-PF, Part XV, line 3a

342780.

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 ☒
- 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	Name of Exempt Organization	Employer identification number
	ISERMANN FAMILY FOUNDATION, INC. C/O F. PETERMANN	22-2615361
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions.	
	21 HIGHFIELD LANE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	RUTHERFORD, NJ 07070	

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 |

SECRETARY

- The books are in the care of ▶ 21 HIGHFIELD LANE - RUTHERFORD, NJ 07070
- Telephone No. ▶ (201) 712-9800 FAX No. ▶ (201) 712-0988

- 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	\$	1300.
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	\$	4183.
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	\$	0.

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

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form 8868 (Rev. 4-2009)