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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

2009Department of the Treasury
Internal Revenue Service

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply

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

Name of foundation

THE KURR FOUNDATION

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

P.O. BOX 143

Room/suite

City or town, state, and ZIP code

MIDDLETOWN, NJ 07748

A Employer identification number

22-3176150

B Telephone number

(732) 219-9200

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end of year

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

\$ 13,706,632. (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 <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B | | | | |
| | 3 Interest on savings and temporary cash investments | | | | |
| | 4 Dividends and interest from securities | 374,010. | 374,010. | | STATEMENT 1 |
| | 5a Gross rents | | | | |
| | b Net rental income or (loss) | | | | |
| | 6a Net gain or (loss) from sale of assets not on line 10 | 3,259. | | | |
| | b Gross sales price for all assets on line 6a | 4,788,689. | | | |
| | 7 Capital gain net income (from Part IV, line 2) | | 3,259. | | |
| | 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 | 377,269. | 377,269. | | | |
| Operating and Administrative Expenses | 13 Compensation of officers, directors, trustees, etc. | 240,000. | 72,000. | | 168,000. |
| | 14 Other employee salaries and wages | | | | |
| | 15 Pension plans, employee benefits | | | | |
| | 16a Legal fees | | | | |
| | b Accounting fees | 35,000. | 17,500. | | 17,500. |
| | c Other professional fees | 114,501. | 114,501. | | 0. |
| | 17 Interest | | | | |
| | 18 Taxes | 2,363. | 2,363. | | 0. |
| | 19 Depreciation and depletion | | | | |
| | 20 Occupancy | | | | |
| | 21 Travel, conferences, and meetings | | | | |
| | 22 Printing and publications | | | | |
| | 23 Other expenses | 48,329. | 11,803. | | 36,526. |
| | 24 Total operating and administrative expenses. Add lines 13 through 23 | 440,193. | 218,167. | | 222,026. |
| | 25 Contributions, gifts, grants paid | 1,289,575. | | | 1,289,575. |
| 26 Total expenses and disbursements. Add lines 24 and 25 | 1,729,768. | 218,167. | | 1,511,601. | |
| 27 Subtract line 26 from line 12 | <1,352,499.> | | | | |
| a Excess of revenue over expenses and disbursements | | | | | |
| b Net investment income (if negative, enter -0-) | | 159,102. | | | |
| c Adjusted net income (if negative, enter -0-) | | | N/A | | |

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

| | | Beginning of year | End of year | |
|---|---|-------------------|----------------|-----------------------|
| | | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| Assets | 1 Cash - non-interest-bearing | 397,500. | 335,046. | 335,046. |
| | 2 Savings and temporary cash investments | 1,979,592. | 1,050,750. | 1,050,750. |
| | 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 6 | 9,141,611. | 7,923,017. | 9,578,113. |
| | c Investments - corporate bonds STMT 7 | 3,343,177. | 2,865,223. | 2,742,723. |
| 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) | 14,861,880. | 12,174,036. | 13,706,632. | |
| 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 ▶ STATEMENT 8) | 3,593,534. | 2,258,189. | |
| 23 Total liabilities (add lines 17 through 22) | 3,593,534. | 2,258,189. | | |
| Net Assets or Fund Balances | Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> | | | |
| | and complete lines 24 through 26 and lines 30 and 31. | | | |
| | 24 Unrestricted | | | |
| | 25 Temporarily restricted | | | |
| | 26 Permanently restricted | | | |
| | Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> | | | |
| | and complete lines 27 through 31. | | | |
| | 27 Capital stock, trust principal, or current funds | 0. | 0. | |
| 28 Paid-in or capital surplus, or land, bldg, and equipment fund | 3,347,595. | 3,347,595. | | |
| 29 Retained earnings, accumulated income, endowment, or other funds | 7,920,751. | 6,568,252. | | |
| 30 Total net assets or fund balances | 11,268,346. | 9,915,847. | | |
| 31 Total liabilities and net assets/fund balances | 14,861,880. | 12,174,036. | | |

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 | 11,268,346. |
| 2 Enter amount from Part I, line 27a | 2 | <1,352,499.> |
| 3 Other increases not included in line 2 (itemize) ▶ | 3 | 0. |
| 4 Add lines 1, 2, and 3 | 4 | 9,915,847. |
| 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 | 9,915,847. |

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 (SEE ATTACHED SCHEDULE) | P | VARIOUS | VARIOUS |
| b (SEE ATTACHED SCHEDULE) | P | VARIOUS | VARIOUS |
| 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 1,076,426. | | 1,260,444. | <184,018.> |
| b 3,712,263. | | 3,524,986. | 187,277. |
| c | | | |
| d | | | |
| e | | | |

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

| (i) FMV as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col (i) over col (j), if any | (l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h)) |
|------------------------|--------------------------------------|---|--|
| a | | | <184,018.> |
| b | | | 187,277. |
| c | | | |
| d | | | |
| e | | | |

| | |
|--|--|
| 2 Capital gain net income or (net capital loss) | <div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> <div style="margin-left: 10px;"> 2 3,259. </div> </div> |
| 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 | <div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 </div> <div style="margin-left: 10px;"> 3 N/A </div> </div> |

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 | 1,430,830. | 18,270,231. | .078315 |
| 2007 | 1,244,925. | 20,092,672. | .061959 |
| 2006 | 1,164,325. | 18,063,803. | .064456 |
| 2005 | 900,179. | 16,243,962. | .055416 |
| 2004 | 645,232. | 14,651,913. | .044037 |

| | |
|--|----------------------|
| 2 Total of line 1, column (d) | 2 .304183 |
| 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 .060837 |
| 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 | 4 12,818,662. |
| 5 Multiply line 4 by line 3 | 5 779,849. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | 6 1,591. |
| 7 Add lines 5 and 6 | 7 781,440. |
| 8 Enter qualifying distributions from Part XII, line 4 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 | 8 1,511,601. |

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

| | | | |
|--|------------|----|---------|
| 1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions) | | 1 | 1,591. |
| 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 | | | |
| 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 | 1,591. |
| 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 | 1,591. |
| 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 20,290. | 7 | 20,290. |
| b Exempt foreign organizations - tax withheld at source | 6b | 8 | |
| c Tax paid with application for extension of time to file (Form 8868) | 6c | 9 | |
| d Backup withholding erroneously withheld | 6d | 10 | 18,699. |
| 7 Total credits and payments Add lines 6a through 6d | | 11 | 0. |
| 8 Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached | | | |
| 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | | | |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | 18,699. | | |
| 11 Enter the amount of line 10 to be Credited to 2010 estimated tax | Refunded | | |

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 <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0. | | |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0. | | |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities | | X |
| 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | | X |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | X |
| b If "Yes," has it filed a tax return on Form 990-T for this year? | | |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T | | X |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? | X | |
| 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV. | X | |
| 8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> NJ | | |
| 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 ► JOHN H. ROGICKI Telephone no ► (908) 461-0693
 Located at ► 6 CARLA COURT, HOLMDEL, NJ ZIP+4 ► 07733

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐
 and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A

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

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

| | Yes | No |
|---|---|------|
| 1a During the year did the foundation (either directly or indirectly) | | |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here | N/A | 1b |
| c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009? | | 1c 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? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) | N/A | 2b |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here | | |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) | N/A | 3b |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | | 4a 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 |

Form 990-PF (2009)

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

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

N/A

☐ Yes ☐ No

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

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

6b

X

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 |
|---|---|---|---|---------------------------------------|
| JOHN H. ROGICKI 6 CARLA COURT HOLMDEL, NJ 07733 | TRUSTEE/PRESIDENT 2.00 | 0. | 0. | 0. |
| NORMA R. PANE 2057 63RD STREET BROOKLYN, NY 11204 | TRUSTEE/TREASURER 2.00 | 0. | 0. | 0. |
| ROBERT J. GAUGHRAN 218 NAVESINK RIVER ROAD; P.O. BOX 415 MIDDLETOWN, NJ 07748 | TRUSTEE/SECRETARY 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

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 |
|--|--|------------------|
| TRAIN, BABCOCK ADVISORS, LLC - 100 PARK AVENUE, 27TH FLOOR, NEW YORK, NY 10017 | INVESTMENT ADVISORY SERVICES | 114,501. |
| KEVIN W. CLUNE CPA, LLC - 100 PARK AVENUE, 27TH FLOOR, NEW YORK, NY 10017 | ACCOUNTING AND TAX COMPLIANCE SERVICES | 35,000. |
| | | |
| | | |
| | | |
| | | |

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

0

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

| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. | Expenses |
|--|----------|
| 1 N/A | 0. |
| 2 | |
| 3 | |
| 4 | |

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

| Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 | Amount |
|--|--------|
| 1 N/A | |
| 2 | |
| All other program-related investments See instructions | |
| 3 | |
| Total. Add lines 1 through 3 | 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 | 11,059,326. |
| b | Average of monthly cash balances | 1b | 1,954,544. |
| c | Fair market value of all other assets | 1c | |
| d | Total (add lines 1a, b, and c) | 1d | 13,013,870. |
| 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 | 13,013,870. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 195,208. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 12,818,662. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 640,933. |

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 | 640,933. |
| 2a | Tax on investment income for 2009 from Part VI, line 5 | 2a | 1,591. |
| b | Income tax for 2009 (This does not include the tax from Part VI) | 2b | |
| c | Add lines 2a and 2b | 2c | 1,591. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 639,342. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 639,342. |
| 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 | 639,342. |

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 | 1,511,601. |
| 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 | 1,511,601. |
| 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 | 1,591. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 1,510,010. |

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 | | | | 639,342. |
| 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 | | | | |
| b From 2005 | | | | |
| c From 2006 | | | | |
| d From 2007 | | | | 25,422. |
| e From 2008 | | | | 525,194. |
| f Total of lines 3a through e | 550,616. | | | |
| 4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 1,511,601. | | | | |
| 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 | | | | 639,342. |
| e Remaining amount distributed out of corpus | 872,259. | | | |
| 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 | 1,422,875. | | | |
| 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 | 0. | | | |
| 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a | 1,422,875. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2005 | | | | |
| b Excess from 2006 | | | | |
| c Excess from 2007 | | | | 25,422. |
| d Excess from 2008 | | | | 525,194. |
| e Excess from 2009 | | | | 872,259. |

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 VARIOUS CHARITABLE ORGANIZATIONS- (SEE SCHEDULE ATTACHED) | NONE | EXEMPT | VARIOUS- (SEE SCHEDULE ATTACHED) | 1289575. |
| Total | | | 3a | 1289575. |
| b Approved for future payment (SEE SCHEDULE ATTACHED) | NONE | EXEMPT | (SEE SCHEDULE ATTACHED) | |
| Total | | | 3b | 0. |

Part XVI-A

| Unrelated business income | | Excluded by section 512, 513, or 514 | | (e) |
|---------------------------|---------------|--------------------------------------|---------------|--------------------------------------|
| (a) Business code | (b) Amount | (c) Exclu- sion code | (d) Amount | Related or exempt function income |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | 14 | 374,010. | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | 18 | 3,259. | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | 0. | | 377,269. | 0. |
| | | | 13 | 377,269. |

Part XVI-B[illegible]

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

| | | | |
|---|--------------|------------|-----------|
| 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | Yes | No |
| a Transfers from the reporting foundation to a noncharitable exempt organization of | | | |
| (1) Cash | 1a(1) | | X |
| (2) Other assets | 1a(2) | | X |
| b Other transactions | | | |
| (1) Sales of assets to a noncharitable exempt organization | 1b(1) | | X |
| (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | | X |
| (3) Rental of facilities, equipment, or other assets | 1b(3) | | X |
| (4) Reimbursement arrangements | 1b(4) | | X |
| (5) Loans or loan guarantees | 1b(5) | | X |
| (6) Performance of services or membership or fundraising solicitations | 1b(6) | | X |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | | X |
| d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | | |

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

| b If "Yes," complete the following schedule | | |
|---|--------------------------|---------------------------------|
| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
| N/A | | |
| | | |
| | | |
| | | |
| | | |

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

| | | | | | | |
|--------------------------|---|--|--|--|---|--|
| Sign Here | Signature of officer or trustee: <u>John H. Logishi</u> | | Date: <u>6/22/10</u> | | Title: <u>PRESIDENT & TRUSTEE</u> | |
| | Preparer's signature: <u>Kevin W. Clune</u> | | Date: <u>06/21/10</u> | | Check if self-employed: <input checked="" type="checkbox"/> | |
| Paid Preparer's Use Only | Firm's name (or yours if self-employed), address, and ZIP code: <u>KEVIN W. CLUNE CPA, LLC</u> <u>100 PARK AVENUE, 27TH FLOOR</u> <u>NEW YORK, N.Y. 10017</u> | | EIN: <u>13-1886450</u> | | Preparer's identifying number: <u>00000000</u> | |
| | Phone no: <u>(212) 922-0301</u> | | Signature of preparer: <u>Kevin W. Clune</u> | | | |

Form **990-PF** (2009)

| | | | |
|-------------|--|-----------|---|
| FORM 990-PF | DIVIDENDS AND INTEREST FROM SECURITIES | STATEMENT | 1 |
|-------------|--|-----------|---|

| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | COLUMN (A) AMOUNT |
|---|--------------|----------------------------|----------------------|
| DIVIDEND INCOME, THRU C. SCHWAB | 229,946. | 0. | 229,946. |
| DIVIDEND INCOME, THRU ESTATE OF SARA M. ZOCK | 2,344. | 0. | 2,344. |
| INTEREST INCOME THRU C. SCHWAB | 141,719. | 0. | 141,719. |
| INTEREST INCOME, THRU ESTATE OF SARA M. ZOCK | 1. | 0. | 1. |
| TOTAL TO FM 990-PF, PART I, LN 4 | 374,010. | 0. | 374,010. |

| | | | |
|-------------|-----------------|-----------|---|
| FORM 990-PF | ACCOUNTING FEES | STATEMENT | 2 |
|-------------|-----------------|-----------|---|

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|---------------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| ACCOUNTING AND TAX COMPLIANCE FEES | 35,000. | 17,500. | | 17,500. |
| TO FORM 990-PF, PG 1, LN 16B | 35,000. | 17,500. | | 17,500. |

| | | | |
|-------------|-------------------------|-----------|---|
| FORM 990-PF | OTHER PROFESSIONAL FEES | STATEMENT | 3 |
|-------------|-------------------------|-----------|---|

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| INVESTMENT ADVISORY FEES | 114,501. | 114,501. | | 0. |
| TO FORM 990-PF, PG 1, LN 16C | 114,501. | 114,501. | | 0. |

| | | | |
|-------------|-------|-----------|---|
| FORM 990-PF | TAXES | STATEMENT | 4 |
|-------------|-------|-----------|---|

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| FOREIGN TAXES | | | | |
| WITHHELD-DIVIDENDS | 2,363. | 2,363. | | 0. |
| TO FORM 990-PF, PG 1, LN 18 | 2,363. | 2,363. | | 0. |

| | | | |
|-------------|----------------|-----------|---|
| FORM 990-PF | OTHER EXPENSES | STATEMENT | 5 |
|-------------|----------------|-----------|---|

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| OFFICE EXPENSES | 9,250. | 2,775. | | 6,475. |
| BROKER & BANK FEES | 450. | 450. | | 0. |
| TRAVEL & MEETINGS | 36,500. | 7,875. | | 28,625. |
| INSURANCE | 2,129. | 703. | | 1,426. |
| TO FORM 990-PF, PG 1, LN 23 | 48,329. | 11,803. | | 36,526. |

| | | | |
|-------------|-----------------|-----------|---|
| FORM 990-PF | CORPORATE STOCK | STATEMENT | 6 |
|-------------|-----------------|-----------|---|

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|---|------------|----------------------|
| (SEE SCHEDULE ATTACHED)-EQUITIES | 7,923,017. | 9,578,113. |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 7,923,017. | 9,578,113. |

| | | | |
|-------------|-----------------|-----------|---|
| FORM 990-PF | CORPORATE BONDS | STATEMENT | 7 |
|-------------|-----------------|-----------|---|

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|---|------------|----------------------|
| (SEE SCHEDULE ATTACHED)-CORPORATE BONDS | 2,865,223. | 2,742,723. |
| TOTAL TO FORM 990-PF, PART II, LINE 10C | 2,865,223. | 2,742,723. |

The Kurr Foundation
Form 990-PF, Attachment
Part XV, Grants and Contributions Paid or Approved for Future Payment
2009

Line 3(a):

| <u>Recipient's Name & Address:</u> | <u>Status of Recipient</u> | <u>Purpose of Grant</u> | <u>2008 Amount</u> |
|---|----------------------------|--|--------------------|
| 1). 180 Turning Lives Around 1 Bethany Road; Bldg. 3, Suite 42 Hazlet, N.J. 07730 | Exempt | Dedicated to Ending Domestic Violence and Sexual Assault | \$5,000 |
| 2). American Cancer Society 801 Broad St. Shrewsbury, N.J. 07702 | Exempt | Medical Study The Quality of Life Program | \$31,000 |
| 3). American Heart Association 2550 U.S. Highway 1 North Brunswick, N. J. 08902 | Exempt | Medical Study | \$35,000 |
| 4). American Indian Relief Council P.O. Box 6200 Rapid City, S.D. 57709 | Exempt | Community Development | \$1,000 |
| 5). Annunciation School 470 Westchester Avenue Crestwood, N.Y. 10707 | Exempt | Educational Grant | \$1,000 |
| 6). Baruch College One Bernard Baruch Way Box A-1603 New York, N.Y. 10010 | Exempt | Educational Grant | \$1,000 |
| 7). Berks County Community Fund P.O. Box 212 Reading, PA 19603 | Exempt | Scholarships | \$50,000 |
| 8). Bethel Elementary School 8390 Lancaster Avenue Bethel, PA 19507 | Exempt | Educational Grant Children's Education | \$10,000 |
| 9). Bethel SDA Church 457 Grand Avenue Brooklyn, N.Y. 11238 | Exempt | Hope for Humanity Program | \$1,000 |
| 10). Bishop's Annual Appeal Diocese of Trenton 701 Laurensville Road Trenton, N.J. 08638 | Exempt | Community Development | \$5,000 |

The Kurr Foundation
Form 990-PF, Attachment
Part XV, Grants and Contributions Paid or Approved for Future Payment
2009

Line 3(a):

| <u>Recipient's Name & Address:</u> | <u>Status of Recipient</u> | <u>Purpose of Grant</u> | <u>2008 Amount</u> |
|---|----------------------------|---|--------------------|
| 11.) Boys and Girls Club of Monmouth County P.O. Box 189 Asbury Park, N.J. 07712 | Exempt | Community Development | \$15,000 |
| 12.) Brookdale Community College 765 Newman Springs Road Lincroft, N.J. 08754 | Exempt | Educational Grant Scholarship Fund | \$25,000 |
| 13.) Calvary Hospital 1740 Eastchester Road Bronx, N.Y. 10461 | Exempt | Medical Assistance | \$28,500 |
| 14.) Children's Psychiatric Center CPS Behavioral Healthcare Center 10 Industrial Way East Eatontown, N.J. 07724 | Exempt | Medical Assistance | \$2,000 |
| 15.) CitiMeals On-Wheels Church Street Station P.O. Box 4007 New York, N.Y. 10277-1044 | Exempt | Community Development | \$500 |
| 16.) The Community YMCA 113 Tindall Road Middletown, N.J. 07748 | Exempt | Community Development Building a Healthy Future Campaign | \$15,000 |
| 17.) COPTIC Orthodox Church 4095 Amboy Road Staten Island, N.Y. 10308 | Exempt | Educational Grant | \$500 |
| 18.) Covenant House Times Square Station P.O. Box 731 New York, N.Y. 10108 | Exempt | Community Development | \$1,000 |
| 19.) Covenant House of New Jersey 3529 Pacific Avenue Atlantic City, N.J. 08401 | Exempt | Community Development | \$1,000 |

The Kurr Foundation
Form 990-PF, Attachment
Part XV, Grants and Contributions Paid or Approved for Future Payment
2009

Line 3(a):

| <u>Recipient's Name & Address:</u> | <u>Status of Recipient</u> | <u>Purpose of Grant</u> | <u>2008 Amount</u> |
|--|----------------------------|--|--------------------|
| 20). Doctor's Without Borders USA, Inc. 333 Seventh Avenue, 2nd Floor New York, N.Y. 10001 | Exempt | Medical Assistance | \$50,000 |
| 21). Dominican Sisters of Blauvelt 496 Western Highway Blauvelt, N.Y. 10913-2097 | Exempt | Religious | \$1,000 |
| 22). Family and Children's Service 191 Bath Avenue Long Branch, N.J. 07740 | Exempt | Community Development | \$5,000 |
| 23). Family Promise of Monmouth County Attn: Tara Maffei P.O. Box 304 Keansburg, N.J. 07734 | Exempt | 2007 Check Voided | (\$7,500) |
| 24). Friends Seminary 222 East 16 Street New York, N.Y. 10003 | Exempt | Educational Grant | \$2,500 |
| 25). Holiday Express 968 Shrewsbury Avenue Tinton Falls, N.J. 07724 | Exempt | Community Development | \$7,500 |
| 26). Inner City Scholarship Fund 1011 First Avenue, 14th Floor New York, N.Y. 10022-4122 | Exempt | Community Development | \$1,000 |
| 27). Interfaith Neighbors of Asbury Park 810 Fourth Avenue Asbury Park, N.J. 07712 | Exempt | Community Development | \$8,000 |
| 28). Jersey Shore Medical Center 4900 Route 33, Suite 100 Neptune, N.J. 07753 | Exempt | Medical Teaching Facility - Capital Campaign Project | \$400,000 |
| 29). Kings College Theatre Department 133 North River Street Wilkes-Barre, PA 18711 | Exempt | Educational | \$5,000 |

The Kurr Foundation
Form 990-PF, Attachment
Part XV, Grants and Contributions Paid or Approved for Future Payment
2009

Line 3(a):

| <u>Recipient's Name & Address:</u> | <u>Status of Recipient</u> | <u>Purpose of Grant</u> | <u>2008 Amount</u> |
|---|----------------------------|--|--------------------|
| 30.) Long Island University 1 University Plaza Brooklyn, N.Y. 11201 | Exempt | Educational | \$37,500 |
| 31.) Memorial Sloan Kettering Cancer Center 1275 York Avenue New York, N.Y. 10065 | Exempt | Medical Research | \$1,000 |
| 32.) Mercy Center, Sisters Academy 1106 Main Street Asbury Park, N.J. 07712 | Exempt | Educational Facility Capital Campaign | \$28,575 |
| 33.) Meridian Health Foundation 4900 Route 33, Suite 200 Neptune, N.J. 07753 | Exempt | Medical Assistance | \$1,000 |
| 34.) National Hemophilia Foundation 116 West 32nd Street, 11th Floor New York, N.Y. 10001 | Exempt | Medical Assistance | \$500 |
| 35.) New York Botanical Gardens 200th Street & Kazimiroff Blvd. Bronx, N.Y. 10458 | Exempt | Public Service | \$1,500 |
| 36.) The New York Public Library Foundation 476 Fifth Avenue New York, N.Y. 10018 | Exempt | Educational Grant | \$1,500 |
| 37.) Notre Dame Academy 76-134 Howard Avenue Staten Island, N.Y. 10301 | Exempt | Educational | \$2,500 |
| 38.) The Parker Family Clinic c/o Dr. Eugene Cheslock 209-211 Shrewsbury Ave. Red Bank, N.J. 07701 | Exempt | Medical Assistance | \$30,000 |
| 39.) Preston High School Office of Development 2780 Schurz Avenue Bronx, N.Y. 10465 | Exempt | Educational | \$1,000 |

The Kurr Foundation
Form 990-PF, Attachment
Part XV, Grants and Contributions Paid or Approved for Future Payment
2009

Line 3(a):

| <u>Recipient's Name & Address:</u> | <u>Status of Recipient</u> | <u>Purpose of Grant</u> | <u>2008 Amount</u> |
|---|----------------------------|--|--------------------|
| 40.) Red Bank Catholic 112 Broad Street Red Bank, N.J. 07701 | Exempt | Educational | \$32,500 |
| 41.) Rutgers University Foundation Winants Hall 7 College Avenue New Brunswick, N.J. 08901 | Exempt | Educational Grant Children's Education | \$5,000 |
| 42.) Salem Lutheran Church Bethel, PA 19507 | Exempt | Building Repair Fund | \$10,000 |
| 43.) Sea Girt Library P.O. Box 414 Sea Girt, N.J. 08750 | Exempt | Public Service | \$35,000 |
| 44.) Sister's Academy 1416 Springwood Avenue Asbury Park, N.J. 07712 | Exempt | Educational Grant | \$5,000 |
| 45.) St. Ann Child Care Center 121 Main Street Keansburg, N.J. 07734 | Exempt | Pre-School Day Care for Children in Need | \$5,000 |
| 46.) St. Anthony Bread for the Poor 3140 Meramec Street St. Louis, MO 63118 | Exempt | Community Development | \$500 |
| 47.) St. Athanasius Church 2154-61 Street Brooklyn, N.Y. 11204 | Exempt | Community Development | \$4,000 |
| 48.) St. Catherine's Church P. O. Box 655 Holmdel, N.J. 07733 | Exempt | Religious | \$500 |
| 49.) St. James Church 94 Broad Street Red Bank, N.J. 07701 | Exempt | Religious | \$5,000 |

The Kurr Foundation
Form 990-PF, Attachment
Part XV, Grants and Contributions Paid or Approved for Future Payment
2009

Line 3(a):

| <u>Recipient's Name & Address:</u> | <u>Status of Recipient</u> | <u>Purpose of Grant</u> | <u>2008 Amount</u> |
|--|----------------------------|--|---------------------------|
| 50.) St. Jude Children's Research Hospital 501 St. Jude Place Memphis, Tenn. 38105 | Exempt | Medical Assistance for Children | \$11,000 |
| 51.) Student Sponsor Partnership Inc. 21 East 40th Street Suite 1601 New York, N.Y. 10016 | Exempt | Educational Grant Scholars Circle at Cathedral High School | \$10,000 |
| 52.) The Wellness Community 613 Hope Road Eatontown, N.J. 07724 | Exempt | Medical Assistance | \$15,000 |
| 53.) Thirteen 450 West 33rd Street New York, N.Y. 10001 | Exempt | Educational Grant | \$33,000 |
| 54.) Tulpehocken Area School District 428 New Schaefferstown Road Bernville, PA 19506-8939 | Exempt | Building Fund Architectural Study | \$290,000 |
| 55.) Wilson School Playground Committee 210 West Sylvania Avenue Neptune City, N.J. 07753 | Exempt | Educational Grant | \$1,000 |
| 56.) Yonkers Public Library Foundation One Larkin Center Yonkers, N.Y. 10701 | Exempt | Public Service | \$1,000 |
| 57.) Young People's Chorus 1395 Lexington Avenue New York, N.Y. 10128 | Exempt | Educational Grant | \$20,000 |
| Totals | | | <u>\$1,289,575</u> |

Line 3, (b) - Future Commitments:

| | | |
|--|---|-------------------------|
| Jersey Shore Medical Center 4900 Route 33, Suite 100 Neptune, N.J. 07753 | The Remaining amount of a Five Year Commitment to a Capital Campaign | <u>\$400,000</u> |
|--|---|-------------------------|

The Kurr Foundation
Form 990-PF, Page 2, Line10 (b)
Balance Sheet Detail - Investments-Corporate Stock
2009

EQUITY INVESTMENTS:

| No. of Shares | Description: | 12-31-08 Book Value/ (Cost) | 12-31-09 Book Value/ (Cost) | 12-31-09 Fair Market Value |
|--------------------------|--|--|--|---|
| 1). | 6,000 shs. Abbott Laboratories | -0- | \$262,171 | \$323,940 |
| 2). | 12,000 shs. Accenture Ltd. - Cl. A | \$402,527 | 402,527 | 498,000 |
| 3). | 5,400 shs. Becton Dickinson & Co. (Additional shs. Purchased) | 306,500 | 364,499 | 425,844 |
| 4). | 12,000 shs. CVS Caremark Corp., | 283,821 | -0- | -0- |
| 5). | 12,000 shs. Chevron Texaco Corp. (Partial Sale) | 502,400 | 376,800 | 692,910 |
| 6). | 5,400 shs. Covance Inc. | -0- | 293,539 | 294,678 |
| 7). | 3,000 shs. Covidien Ltd. | 120,243 | 120,243 | 143,670 |
| 8). | 7,250 shs. Ebay Inc. | -0- | 176,701 | 170,593 |
| 9). | 5,400 shs. Enerplus Res. Fund New F | 254,064 | 254,064 | 123,984 |
| 10). | 5,000 shs. Enersys | 144,594 | -0- | -0- |
| 11). | 25,000 shs. Exxon Mobil Corp. (Partial Sale) | 1,043,471 | 834,777 | 1,363,800 |
| 12.) | 6,000 shs. F T I Consulting Inc. | -0- | 276,217 | 282,960 |
| 13.) | 2,800 shs. Flowserve Corporation | -0- | 273,291 | 264,684 |
| 14). | 5,600 shs. Gamestop Corp.Cl. A New | -0- | 139,786 | 122,864 |
| 15). | 1,600 shs. Google, Inc. Cl. A (Partial Sale) | 633,763 | 230,066 | 495,984 |
| 16). | 18,000 shs. Grupo Televisa SA | 439,337 | -0- | -0- |
| 17). | 3,000 shs. Heinz H J Co. | 115,247 | \$115,247 | \$128,280 |
| 18). | 4,000 shs. Hershey Foods Corp. | 111,188 | -0- | -0- |
| 19). | 14,000 shs. Hewlett Packard Co. | \$588,207 | -0- | -0- |

The Kurr Foundation
Form 990-PF, Page 2, Line 10 (b)
Balance Sheet Detail - Investments-Corporate Stock
2009

| <u>EQUITY INVESTMENTS (CONTINUED):</u> | | 12-31-08 | 12-31-09 | 12-31-09 |
|---|---|--------------------|--------------------|--------------------|
| No. of | Description: | Book | Book | Fair |
| Shares | | Value/ | Value/ | Market |
| | | (Cost) | (Cost) | Value |
| 20). | 20,000 shs. ICONIX Brand Group, Inc. | \$309,036 | -0- | -0- |
| 21). | 4,000 shs. Johnson & Johnson (Partial Sale) | 507,680 | \$190,410 | \$257,640 |
| 22). | 10,000 shs. Manulife Financial Corp. | 341,705 | -0- | -0- |
| 23). | 3,000 shs. Minnesota Mining & Manufact. (3M) (Additional shs. Purchased) | 147,317 | 215,029 | 322,413 |
| 24). | 10,500 shs. Noble Corp. | 495,952 | 495,952 | 427,350 |
| 25). | 27,500 shs. Oracle Corporation (Additional shs. Purchased) | 379,544 | 535,972 | 674,575 |
| 26). | 6,000 shs. PPG Industries | 327,769 | 327,769 | 351,240 |
| 27). | 10,000 shs. Paychex Inc. | -0- | 258,030 | 306,400 |
| 28). | 5,500 shs. Pepsico Inc. | 384,156 | 384,156 | 334,400 |
| 29). | 7,000 shs. Qualcomm Inc. | -0- | 296,917 | 323,820 |
| 30). | 7,000 shs. Schlumberger Ltd. F | 337,058 | 337,058 | 455,630 |
| 31.) | 9,000 shs. State Street Corp., (Partial Sale) | 374,765 | 229,023 | 239,470 |
| 32). | 11,500 shs. Sysco Corporation | -0- | 264,636 | 321,310 |
| 33). | 2,798 shs. Transocean Inc. New F | 268,139 | \$268,139 | \$231,674 |
| 34). | 10,000 shs. VCA Antech Inc. | \$323,130 | -0- | -0- |
| Total Equity Investments: | | \$9,141,613 | \$7,923,019 | \$9,578,113 |

The Kurr Foundation
Form 990-PF, Page 2, Line10 (c)
Balance Sheet Detail - Investments-Corporate Bonds
2009

Corporate Bonds:

| | Face Amount | Description: | 12-31-08 Book Value/ (Cost) | 12-31-09 Book Value/ (Cost) | 12-31-09 Fair Market Value |
|--|----------------|--|--------------------------------------|--------------------------------------|-------------------------------------|
| 1). | 250,000 | Abbot Labs 5.375%, 5/15/09 | \$254,443 | -0- | -0- |
| 2). | 10,000 | Bank of America Capital Trust XII | 250,000 | \$250,000 | \$217,000 |
| 3). | 20,000 | Bank of America Corp. , PFD 7.25% | 500,000 | 500,000 | 446,000 |
| 4). | 250,000 | Cisco Systems, Inc. 5.25% , due 2/22/11 | 250,884 | 250,884 | \$262,465 |
| 5.) | 250,000 | Citigroup Inc. 7.25%, due 10/1/10 | 270,500 | 270,500 | 259,163 |
| 6). | 250,000 | Illinois Tool Works, 5.75%, 09 | 252,988 | -0- | -0- |
| 7). | 500,000 | Johnson & Johnson 3.8%, 5/15/13 | \$482,000 | \$482,000 | \$530,523 |
| 8). | 250,000 | Wal-mart Stores 6.875%, due 8/10/09 | \$269,263 | -0- | -0- |
| 9). | 250,000 | Wells Fargo & Co. 5.125%, 9/1/12 | 257,512 | 257,512 | 263,232 |
| 10). | 9,750 | Fleet Capital TR 6%, 8/1/33 | 255,586 | 255,586 | 185,640 |
| 11). | 2,000 | Gabelli Dividend & Income 6%,PFD | 50,000 | 50,000 | 50,600 |
| 12). | 10,000 | US Bancorp Capital XII 6.3%, 2/15/67 | \$250,000 | 250,000 | 228,800 |
| 13.) | 7,300 | Vanguard Emerging Market Fd. | -0- | \$298,740 | \$299,300 |
| Total Corporate Bond Investments: | | | \$3,343,176 | \$2,865,222 | \$2,742,723 |

Note:

Currently, we are not amortizing bond premiums or discounts for book purposes.
In prior years, we have amortized T/E Bonds for Tax purposes, (such as capital gain/loss).

FORM 990-PF

OTHER LIABILITIES

STATEMENT

8

DESCRIPTIONBOY AMOUNTEOY AMOUNTADVANCE RECEIVED FROM ESTATE OF SARA
M. ZOCK

3,593,534.

2,258,189.

TOTAL TO FORM 990-PF, PART II, LINE 22

3,593,534.

2,258,189.

Train, Babcock Advisors LLC

Realized Capital Gains/Losses for 2009

THE KURR FOUNDATION

| Descriptions | Purchase Date | Sale Date | SHORT TERM | | | LONG TERM | | |
|--|---------------|-----------|--------------|--------------|------------------------|--------------|--------------|---------------|
| | | | Proceeds | Cost | Gain (Loss) | Proceeds | Cost | Gain (Loss) |
| Fixed Income: | | | | | | | | |
| 250,000 ILLINOIS TOOL WORKS, INC. 5.75% DUE 3-01-09 | 10/2/2008 | 3/1/2009 | \$250,000.00 | \$252,987.50 | (\$2,987.50) (MATURED) | | | |
| 250,000 ABBOTT LABORATORIES 5.375% DUE 5-15-09 | 10/2/2008 | 5/15/2009 | \$250,000.00 | \$254,442.50 | (\$4,442.50) (MATURED) | | | |
| 250,000 WAL MART STORES, INC. 6.875% DUE 8-10-09 | 4/29/2002 | 8/10/2009 | | | (MATURED) | \$250,000.00 | \$269,262.50 | (\$19,262.50) |
| Total Fixed Income: | | | \$500,000.00 | \$507,430.00 | (\$7,430.00) | \$250,000.00 | \$269,262.50 | (\$19,262.50) |

| Equities: | Purchase Date | Sale Date | SHORT TERM | | | LONG TERM | | |
|--------------------------------------|---------------|-----------|--------------|--------------|----------------|--------------|--------------|----------------|
| | | | Proceeds | Cost | Gain (Loss) | Proceeds | Cost | Gain (Loss) |
| 2,500 SHS, ENERSYS INC. | 8/6/2008 | 1/12/2009 | \$27,263.34 | \$72,297.00 | (\$45,033.66) | | | |
| 18,000 SHS, GROUPO TELEVISIA S.A. | 10/2/2007 | 3/3/2009 | | | | \$204,984.64 | \$439,336.80 | (\$234,352.16) |
| 10,000 SHS, MANULIFE FINANCIAL CORP. | 7/1/2008 | 3/16/2009 | \$104,821.40 | \$341,705.00 | (\$236,883.60) | | | |
| 3,500 SHS, STATE STREET CORP. | 10/13/2004 | 3/16/2009 | | | | \$82,420.68 | \$145,742.10 | (\$63,321.42) |
| 2,500 SHS, ENERSYS INC. | 8/6/2008 | 3/18/2009 | \$27,955.09 | \$72,297.00 | (\$44,341.91) | | | |
| 20,000 SHS, ICONIX BRAND GROUP, INC. | 4/23/2008 | 4/29/2009 | | | | \$274,666.88 | \$309,036.00 | (\$34,369.12) |
| 6,680 SHS, CVS CAREMARK CORP. | 6/4/2004 | 5/4/2009 | | | | \$212,143.99 | \$132,255.20 | \$79,888.79 |
| 5,320 SHS, CVS CAREMARK CORP. | 11/29/2006 | 5/4/2009 | | | | \$168,952.99 | \$151,566.27 | \$17,386.72 |
| 1,500 SHS, FLOWSERVE CORPORATION | 7/8/2009 | 8/5/2009 | \$128,318.69 | \$93,040.20 | \$35,278.49 | | | |

Train, Babcock Advisors LLC

Realized Capital Gains/Losses for 2009

THE KURR FOUNDATION

| Descriptions | Purchase Date | Sale Date | SHORT TERM | | | LONG TERM | | |
|------------------------------------|---------------|------------|----------------|----------------|----------------|----------------|----------------|---------------|
| | | | Proceeds | Cost | Gain (Loss) | Proceeds | Cost | Gain (Loss) |
| 10,000 SHS, VCA ANTECH INC. | 2/5/2008 | 10/5/2009 | | | | \$259,903.30 | \$323,130.00 | (\$63,226.70) |
| 3,000 SHS, EXXON MOBIL CORPORATION | 7/31/2001 | 10/16/2009 | | | | \$218,694.37 | \$125,216.55 | \$93,477.82 |
| 2,000 SHS, EXXON MOBIL CORPORATION | 11/17/2008 | 11/9/2009 | | | | \$145,478.05 | \$83,477.70 | \$62,000.35 |
| 3,000 SHS, CHEVRON CORP. | 7/31/2001 | 11/9/2009 | | | | \$232,647.01 | \$125,599.87 | \$107,047.14 |
| 3,000 SHS, JOHNSON & JOHNSON | 7/31/2001 | 11/9/2009 | | | | \$181,138.03 | \$142,807.50 | \$38,330.53 |
| 2,000 SHS, JOHNSON & JOHNSON | 8/8/2005 | 11/9/2009 | | | | \$120,758.69 | \$126,860.00 | (\$6,101.31) |
| 800 SHS, GOOGLE INC. | 2/5/2008 | 11/10/2009 | | | | \$452,866.19 | \$403,697.84 | \$49,168.35 |
| 9,000 SHS, HEWLETT-PACKARD CO. | 1/18/2007 | 11/10/2009 | | | | \$446,804.29 | \$381,175.20 | \$65,629.09 |
| 5,000 SHS, HEWLETT-PACKARD CO. | 2/21/2007 | 11/10/2009 | | | | \$248,224.61 | \$207,032.00 | \$41,192.61 |
| 2,800 SHS, FLOWSERVE CORPORATION | 7/8/2009 | 11/10/2009 | \$288,068.06 | \$173,675.03 | \$114,393.03 | | | |
| 4,000 SHS, HERSHEY CO. | 7/31/2001 | 11/12/2009 | | | | \$151,436.09 | \$111,188.00 | \$40,248.09 |
| 1,000 SHS, JOHNSON & JOHNSON | 7/31/2001 | 11/12/2009 | | | | \$61,142.72 | \$47,602.50 | \$13,540.22 |
| Total Equities: | | | \$576,426.58 | \$753,014.23 | (\$176,587.65) | \$3,462,262.53 | \$3,255,723.53 | \$206,539.00 |
| Grand Total: | | | \$1,076,426.58 | \$1,260,444.23 | (\$184,017.65) | \$3,712,262.53 | \$3,524,986.03 | \$187,276.50 |

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

► File a separate application for each return.

OMB No. 1545-1709

- 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 | Name of Exempt Organization | Employer identification number |
| | THE KURR FOUNDATION | 22-3176150 |
| | Number, street, and room or suite no. If a P.O. box, see instructions. P.O. BOX 143 | |
| File by the due date for filing your return. See instructions | City, town or post office, state, and ZIP code. For a foreign address, see instructions. MIDDLETOWN, NJ 07748 | |

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

- | | | |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990 | <input type="checkbox"/> Form 990-T (corporation) | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above) | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 8870 |

JOHN H. ROGICKI

- The books are in the care of ► **6 CARLA COURT - HOLMDEL, NJ 07733**
Telephone No. ► **(908) 461-0693** 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 | \$ | 20,290. |
| 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 | \$ | 20,290. |
| 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)