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Return of Private Foundation

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

Treated as a Private Foundation

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning

, 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 MARION & NORMAN TANZMAN
CHARITABLE FOUNDATION

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

10 WOODBRIDGE CTR. DR. P.O. BOX 1408

Room/suite

City or town, state, and ZIP code

WOODBIDGE, NJ 07095

A Employer identification number

22-3506061

B Telephone number

732-750-5757

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)

\$ 21,063,634. (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	870,985.			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	271.	271.	271.	STATEMENT 1
	4 Dividends and interest from securities	637,792.	637,792.	637,792.	STATEMENT 2
	5a Gross rents	31,768.	31,768.	31,768.	STATEMENT 3
	b Net rental income or (loss)	14,157.			STATEMENT 4
	6a Net gain or (loss) from sale of assets not on line 10	-1,705,156.			
	b Gross sales price for all assets on line 6a	6,280,064.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain			N/A	
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income	10,902.	755.	10,902.	STATEMENT 5	
12 Total. Add lines 1 through 11	-153,438.	670,586.	680,733.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 6	1,332.	0.	0.	0.
	b Accounting fees STMT 7	14,257.	4,457.	4,457.	0.
	c Other professional fees STMT 8	51,734.	51,734.	1,616.	0.
	17 Interest	115.	115.	0.	0.
	18 Taxes STMT 9	32,955.	16,181.	10,542.	0.
	19 Depreciation and depletion	3,092.	3,092.	3,092.	
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 10	2,125.	996.	996.	0.
	24 Total operating and administrative expenses. Add lines 13 through 23	105,610.	76,575.	20,703.	0.
	25 Contributions, gifts, grants paid	744,288.			744,288.
26 Total expenses and disbursements. Add lines 24 and 25	849,898.	76,575.	20,703.	744,288.	
27 Subtract line 26 from line 12	-1,003,336.				
a Excess of revenue over expenses and disbursements		594,011.			
b Net investment income (if negative, enter -0-)			660,030.		
c Adjusted net income (if negative, enter -0-)					

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Part II Balance Sheets <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		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	503,274.	584,753.	584,753.
	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	1,638,000.	1,456,000.	1,456,000.
	7 Other notes and loans receivable ▶ 331,126.			
	Less allowance for doubtful accounts ▶	610,360.	331,126.	331,126.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations STMT 13	393,153.	662,342.	630,206.
	b Investments - corporate stock STMT 14	3,770,008.	11,464,665.	9,855,920.
	c Investments - corporate bonds STMT 15	506,164.	1,002,407.	969,328.
11 Investments - land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 16	16,394,831.	7,389,248.	6,797,720.	
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶ STATEMENT 17)	437,892.	438,581.	438,581.	
16 Total assets (to be completed by all filers)	24,253,682.	23,329,122.	21,063,634.	
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 ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	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	24,253,682.	23,329,122.	
30 Total net assets or fund balances	24,253,682.	23,329,122.		
31 Total liabilities and net assets/fund balances	24,253,682.	23,329,122.		

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	24,253,682.
2 Enter amount from Part I, line 27a	2	-1,003,336.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 11	3	79,338.
4 Add lines 1, 2, and 3	4	23,329,684.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 12	5	562.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	23,329,122.

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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					
b SEE ATTACHED STATEMENT					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e 6,280,064.		7,985,220.	-1,705,156.		
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					
b					
c					
d					
e			-1,705,156.		
2 Capital gain net income or (net capital loss)		<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>		2	-1,705,156.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)		<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 </div>		3	-343,989.

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	1,088,102.	19,137,762.	.056856
2007	333,395.	8,042,886.	.041452
2006	286,082.	4,623,988.	.061869
2005	37,000.	4,284,314.	.008636
2004	220,500.	4,625,426.	.047671
2 Total of line 1, column (d)			2 .216484
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 .043297
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 15,874,491.
5 Multiply line 4 by line 3			5 687,318.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 5,940.
7 Add lines 5 and 6			7 693,258.
8 Enter qualifying distributions from Part XII, line 4			8 744,288.

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.

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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	5,940.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		3	5,940.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
3 Add lines 1 and 2		5	5,940.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	7,280.	
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	7,280.	
8 Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	4.	
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	1,336.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax <input checked="" type="checkbox"/> 1,336. Refunded <input type="checkbox"/>	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
1c Did the foundation file Form 1120-POL for this year?		X
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> 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

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► BARBARA SOUSA, TRUSTEE Located at ► AS LISTED, WOODBRIDGE, NJ	Telephone no ► 732-750-5757 ZIP+4 ► 07095		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input checked="" type="checkbox"/> Yes <input 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)		3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

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
SEE STATEMENT 18		0.	0.	0.

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

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

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

0

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**THE MARION & NORMAN TANZMAN
CHARITABLE FOUNDATION**

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	15,302,877.
b	Average of monthly cash balances	1b	813,358.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	16,116,235.
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	16,116,235.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	241,744.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	15,874,491.
6	Minimum investment return. Enter 5% of line 5	6	793,725.

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	793,725.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	5,940.
b	Income tax for 2009 (This does not include the tax from Part VI.)	2b	6,051.
c	Add lines 2a and 2b	2c	11,991.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	781,734.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	781,734.
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	781,734.

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	744,288.
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	744,288.
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	5,940.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	738,348.

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				781,734.
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	53,570.			
b From 2005				
c From 2006	42,979.			
d From 2007				
e From 2008	151,402.			
f Total of lines 3a through e	247,951.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$	744,288.			
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				744,288.
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))	37,446.			37,446.
6 Enter the net total of each column as indicated below:	210,505.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	16,124.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	194,381.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006	42,979.			
c Excess from 2007				
d Excess from 2008	151,402.			
e Excess from 2009				

**THE MARION & NORMAN TANZMAN
CHARITABLE FOUNDATION**

Form 990-PF (2009)

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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)

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

NONE

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

NONE

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

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

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

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

c Any submission deadlines

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

Part 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	RAYMOND JAMES - SEE ATTACHED SCHEDULE	P	VARIOUS	VARIOUS
b	RAYMOND JAMES - SEE ATTACHED SCHEDULE	P	VARIOUS	VARIOUS
c	CLAYMORE FUND	P	VARIOUS	VARIOUS
d	UBS FINANCIAL SERVICES - SEE ATTACHED SCHEDULE	P	VARIOUS	VARIOUS
e	UBS FINANCIAL SERVICES - SEE ATTACHED SCHEDULE	P	VARIOUS	VARIOUS
f	CAPITAL GAINS DIVIDENDS			
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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 753,128.		730,819.	22,309.
b 1,411,339.		1,756,964.	-345,625.
c 130.			130.
d 645,977.		1,012,275.	-366,298.
e 3,467,227.		4,485,162.	-1,017,935.
f 2,263.			2,263.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			** 22,309.
b			-345,625.
c			130.
d			** -366,298.
e			-1,017,935.
f			2,263.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	-1,705,156.
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	-343,989.

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

SOURCE	AMOUNT
MIDDLETAN ENTERPRISES, LLC	271.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	271.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
J. SHEIN NOTE	95,550.	0.	95,550.
RAYMOND JAMES - ACCRUED INTEREST PAID	-12,020.	0.	-12,020.
RAYMOND JAMES - DIVIDEND INCOME	201,517.	2,263.	199,254.
RAYMOND JAMES - INTEREST INCOME	132,496.	0.	132,496.
RAYMOND JAMES - OID INCOME	12,782.	0.	12,782.
TELWOOD ASSOCIATES NOTE	8,458.	0.	8,458.
UBS FINANCIAL SERVICES - DIVIDEND INCOME	138,032.	0.	138,032.
UBS FINANCIAL SERVICES - INTEREST INCOME	121.	0.	121.
UBS FINANCIAL SERVICES - OID INCOME	7,185.	0.	7,185.
WELLS FARGO/WACHOVIA - DIVIDEND INCOME	47,447.	0.	47,447.
WELLS FARGO/WACHOVIA - INTEREST INCOME	42.	0.	42.
WELLS FARGO/WACHOVIA - OID INCOME	8,445.	0.	8,445.
TOTAL TO FM 990-PF, PART I, LN 4	640,055.	2,263.	637,792.

FORM 990-PF RENTAL INCOME STATEMENT 3

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
SERVICE STATION RT. 516 OLD BRIDGE, NJ	1	31,768.
TOTAL TO FORM 990-PF, PART I, LINE 5A		31,768.

FORM 990-PF	RENTAL EXPENSES	STATEMENT	4
DESCRIPTION	ACTIVITY NUMBER	AMOUNT	TOTAL
REAL ESTATE TAXES		10,542.	
INSURANCE		946.	
BOOKKEEPING AND MANAGEMENT FEES		1,616.	
PROFESSIONAL FEES		4,457.	
NEW JERSEY ANNUAL REPORT FEE		50.	
- SUBTOTAL -	1		17,611.
TOTAL RENTAL EXPENSES			17,611.
NET RENTAL INCOME TO FORM 990-PF, PART I, LINE 5B			14,157.

FORM 990-PF	OTHER INCOME	STATEMENT	5
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
SECURITIES CLASS ACTION LITIGATIONS	755.	755.	755.
PASS THROUGH LOSS FROM TYRO, INC.	-12,658.	0.	-12,658.
PASS THROUGH LOSS FROM DISPLAY MATRIX CORPORATION	-1,200.	0.	-1,200.
PASS THROUGH INCOME FROM JO NO ASSOCIATES, LLC	-298.	0.	-298.
PASS THROUGH INCOME FROM NO JO ASSOCIATES, LLC	24,303.	0.	24,303.
TOTAL TO FORM 990-PF, PART I, LINE 11	10,902.	755.	10,902.

FORM 990-PF	LEGAL FEES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LEGAL FEES	1,332.	0.	0.	0.	
TO FM 990-PF, PG 1, LN 16A	1,332.	0.	0.	0.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING	9,800.	0.	0.	0.	
PROFESSIONAL FEES	4,457.	4,457.	4,457.	0.	
TO FORM 990-PF, PG 1, LN 16B	14,257.	4,457.	4,457.	0.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BROKER FEES	50,118.	50,118.	0.	0.	
BOOKKEEPING AND MANAGEMENT FEES	1,616.	1,616.	1,616.	0.	
TO FORM 990-PF, PG 1, LN 16C	51,734.	51,734.	1,616.	0.	

FORM 990-PF	TAXES			STATEMENT	9
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL TAXES	16,719.	0.	0.	0.	
STATE OF NEW JERSEY	55.	0.	0.	0.	
FOREIGN INCOME TAXES	5,639.	5,639.	0.	0.	
REAL ESTATE TAXES	10,542.	10,542.	10,542.	0.	
TO FORM 990-PF, PG 1, LN 18	32,955.	16,181.	10,542.	0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	10
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MEMBERSHIPS	495.	0.	0.	0.	
MISCELLANEOUS	508.	0.	0.	0.	
INSURANCE	126.	0.	0.	0.	
INSURANCE	946.	946.	946.	0.	
NEW JERSEY ANNUAL REPORT FEE	50.	50.	50.	0.	
TO FORM 990-PF, PG 1, LN 23	2,125.	996.	996.	0.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	11
DESCRIPTION		AMOUNT	
TAX EXEMPT INTEREST AND DIVIDEND INCOME		79,338.	
TOTAL TO FORM 990-PF, PART III, LINE 3		79,338.	

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	12
DESCRIPTION		AMOUNT	
PENALTIES		262.	
PASS THROUGH INCOME ON RETURN NOT ON BOOKS		300.	
TOTAL TO FORM 990-PF, PART III, LINE 5		562.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	13
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
MUNICIPAL BONDS - RAYMOND JAMES		X	662,342.	630,206.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			662,342.	630,206.
TOTAL TO FORM 990-PF, PART II, LINE 10A			662,342.	630,206.

FORM 990-PF	CORPORATE STOCK	STATEMENT	14
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITY SECURITIES - RAYMOND JAMES	3,782,335.	3,521,291.
EQUITY SECURITIES - UBS FINANCIAL SERVICES	7,682,330.	6,334,629.
TOTAL TO FORM 990-PF, PART II, LINE 10B	11,464,665.	9,855,920.

FORM 990-PF	CORPORATE BONDS	STATEMENT	15
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS - RAYMOND JAMES	906,345.	969,328.
CORPORATE BONDS - MORGAN STANLEY SMITH BARNEY	96,062.	0.
TOTAL TO FORM 990-PF, PART II, LINE 10C	1,002,407.	969,328.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	16
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME SECURITIES - UBS FINANCIAL SERVICES	COST	2,152,148.	2,296,548.
BROAD COMMODITIES - UBS FINANCIAL SERVICES	COST	688,154.	632,846.
OTHER SECURITIES - UBS FINANCIAL SERVICES	COST	417,537.	479,423.

MUTUAL FUNDS - RAYMOND JAMES	COST	2,542,491.	1,885,469.
UNIT INVESTMENT TRUSTS - RAYMOND JAMES	COST	100,101.	100,968.
PREFERRED SECURITIES - RAYMOND JAMES	COST	1,488,817.	1,402,466.
FIXED INCOME SECURITIES - WACHOVIA/WELLS FARGO	COST	0.	0.
MUTUAL FUNDS - WACHOVIA/WELLS FARGO	COST	0.	0.
TOTAL TO FORM 990-PF, PART II, LINE 13		7,389,248.	6,797,720.

FORM 990-PF	OTHER ASSETS	STATEMENT	17
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS IN CLOSELY HELD ENTITIES	429,640.	426,323.	426,323.
DIVIDENDS RECEIVABLE	8,251.	12,256.	12,256.
MISCELLANEOUS RECEIVABLE	1.	2.	2.
TO FORM 990-PF, PART II, LINE 15	437,892.	438,581.	438,581.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 18
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JEFFRIES SHEIN 10 WOODBRIDGE CENTER DRIVE WOODBIDGE, NJ 07095	TRUSTEE 0.00	0.	0.	0.
BARBARA SOUSA 10 WOODBRIDGE CENTER DRIVE WOODBIDGE, NJ 07095	TRUSTEE 0.00	0.	0.	0.
JENNIFER TURNER 10 WOODBRIDGE CENTER DRIVE WOODBIDGE, NJ 07095	TRUSTEE 0.00	0.	0.	0.
JANICE BARSHAD 10 WOODBRIDGE CENTER DRIVE WOODBIDGE, NJ 07095	TRUSTEE 0.00	0.	0.	0.
SANDERS KLEINFELD 10 WOODBRIDGE CENTER DRIVE WOODBIDGE, NJ 07095	TRUSTEE 0.00	0.	0.	0.
ROY H. TANZMAN 4 TALIA ROAD KENDALL PARK, NJ 08824	TRUSTEE 0.00	0.	0.	0.
DRU KLEINFELD 10 WOODBRIDGE CENTER DRIVE WOODBIDGE, NJ 07095	TRUSTEE 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 19

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
200 CLUB OF MIDDLESEX COUNTY P.O. BOX 387 WOODBRIDGE, NJ 07095	NONE CHARITABLE	EXEMPT	1,500.
AMERICAN CANCER SOCIETY 2600 US HIGHWAY #1 NORTH BRUNSWICK, NJ 08902	NONE CHARITABLE	EXEMPT	12,000.
AMERICAN HEART ASSOCIATION 1 UNION STREET, SUITE 301 ROBBINSVILLE, NJ 08691	NONE CHARITABLE	EXEMPT	3,000.
AMERICAN JEWISH CONGRESS 825 THIRD AVENUE NEW YORK, NY 10022	NONE CHARITABLE	EXEMPT	2,000.
ANTI-DEFAMATION LEAGUE 743 NORTHFIELD AVENUE WEST ORANGE, NJ 07052	NONE CHARITABLE	EXEMPT	1,000.
FRIENDS OF ASAP - ADULT SUBSTANCE ABUSE PROGRAM P.O. BOX 1481 HIGHLAND PARK, NJ 08904	NONE CHARITABLE	EXEMPT	2,500.
CEREBRAL PALSY ASSOCIATION OF MIDDLESEX COUNTY 10 OAK DRIVE EDISON, NJ 08837	NONE CHARITABLE	EXEMPT	208,500.
CHABAD HOUSE - FRIENDS OF LUBAVITCH 170 COLLEGE AVE. NEW BRUNSWICK, NJ 08901	NONE CHARITABLE	EXEMPT	100,000.

CHABAD OF THE SHORE 620 OCEAN AVENUE LONG BRANCH, NJ 07740	NONE CHARITABLE	EXEMPT	10,000.
COMMUNITY FOOD BANK OF NEW JERSEY 31 EVANS TERMINAL ROAD HILLSIDE, NJ 07205	NONE CHARITABLE	EXEMPT	2,500.
CONGREGATION B'NAI ISRAEL 171 RIDGE ROAD RUMSON, NJ 07760	NONE CHARITABLE	EXEMPT	1,000.
DEBORAH HOSPITAL FOUNDATION 212 TRENTON ROAD BROWNS MILLS, NJ 08015	NONE CHARITABLE	EXEMPT	10,000.
FREEHOLD AREA OPEN DOOR, INC. 71 LAGUNA HILLS COURT HOLMDEL, NJ 07733	NONE CHARITABLE	EXEMPT	1,000.
HIGHLAND PARK CONSERVATIVE TEMPLE 201 SOUTH THIRD AVENUE HIGHLAND PARK, NJ 08904	NONE CHARITABLE	EXEMPT	4,000.
HOWARD R. SWEARER CENTER FOR PUBLIC SERVICE - BROWN UNIVERSITY - P.O. BOX 1974 PROVIDENCE, RI 02912	NONE CHARITABLE	EXEMPT	2,500.
JEWISH COMMUNITY CENTER OF MIDDLESEX COUNTY 1775 OAK TREE ROAD EDISON, NJ 08820	NONE CHARITABLE	EXEMPT	35,788.
JEWISH FEDERATION OF GREATER MIDDLESEX COUNTY 230 OLD BRIDGE TURNPIKE SOUTH RIVER, NJ 08882	NONE CHARITABLE	EXEMPT	136,500.
JEWISH FEDERATION OF MONMOUTH COUNTY 100 GRANT AVENUE DEAL, NJ 07723	NONE CHARITABLE	EXEMPT	4,500.

JEWISH SOCIAL SERVICE COMMITTEE 58 HARRISON STREET HIGHLAND PARK, NJ 08904	NONE CHARITABLE	EXEMPT	10,000.
LET'S GET READY 50 BROADWAY, SUITE 806 NEW YORK, NY 10004	NONE CHARITABLE	EXEMPT	2,500.
MEMORIAL SLOAN-KETTERING CANCER CENTER 633 THIRD AVENUE 28TH FLOOR NEW YORK, NY 10017	NONE CHARITABLE	EXEMPT	5,000.
MONMOUTH UNIVERSITY 470 CEDAR AVENUE WEST LONG BRANCH, NJ 07764	NONE CHARITABLE	EXEMPT	5,000.
MORGAN STANLEY CHILDREN'S HOSPITAL OF NY PRESBYTERIAN 654 WEST 170TH STREET NEW YORK, NY 10032	NONE CHARITABLE	EXEMPT	2,500.
NEW BRUNSWICK TOMORROW 390 GEORGE STREET NEW BRUNSWICK, NJ 08901	NONE CHARITABLE	EXEMPT	1,000.
NEW YORK SERVICE FOR THE HANDICAPPED - CAMP OAKHURST C/O MRS. LEON HESS, 625 PARK AVENUE NEW YORK, NY 10021	NONE CHARITABLE	EXEMPT	1,000.
OLPC FOUNDATION P.O. BOX 425087 CAMBRIDGE, MA 02412	NONE CHARITABLE	EXEMPT	2,500.
ONLY MAKE BELIEVE, INC. 1123 BROADWAY NEW YORK, NY 10010	NONE CHARITABLE	EXEMPT	2,500.
RARITAN BAY HEALTHCARE FOUNDATION 471 LAWRIE STREET PERTH AMBOY, NJ 08861	NONE CHARITABLE	EXEMPT	50,000.

ROBERT WOOD JOHNSON UNIVERSITY HOSPITAL FOUNDATION 8 EASTON AVENUE NEW BRUNSWICK, NJ 08901	NONE CHARITABLE	EXEMPT	5,000.
RUTGERS HILLEL 93 COLLEGE AVENUE NEW BRUNSWICK, NJ 08901	NONE CHARITABLE	EXEMPT	3,000.
RUTGERS UNIVERSITY - MARION AND NORMAN TANZMAN HALL FOR JEWISH LEARNING - 77 HAMILTON STREET NEW BRUNSWICK, NJ 08901-1248	NONE CHARITABLE	EXEMPT	100,000.
ST JUDE CHILDRENS' RESEARCH HOSPITAL 501 ST. JUDE PLACE MEMPHIS, TN 30105-1942	NONE CHARITABLE	EXEMPT	2,500.
ST. JAMES ROMAN CATHOLIC CHURCH 148 GREENVILLE STREET WOODBIDGE, NJ 07095	NONE CHARITABLE	EXEMPT	5,000.
ST. JOSEPH'S SENIOR RESIDENCE 1 SAINT JOSEPH'S TERRACE WOODBIDGE, NJ 07095	NONE CHARITABLE	EXEMPT	5,000.
TEMPLE SHAARI EMETH 400 CRAIG ROAD MANALAPAN, NJ 07726	NONE CHARITABLE	EXEMPT	2,500.
RWJ MEDICAL SCHOOL - UMDNJ NEW BRUNSWICK INTERPRETER PROGRAM 125 PATTERSON STREET NEW BRUNSWICK, NJ 08091	NONE CHARITABLE	EXEMPT	1,000.

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

744,288.

FORM 990-PF

OTHER REVENUE

STATEMENT 20

DESCRIPTION	BUS CODE	UNRELATED BUSINESS INC	EXCL CODE	EXCLUDED AMOUNT	RELATED OR EXEMPT FUNC- TION INCOME
PASS THROUGH LOSS FROM TYRO, INC.	531390	-12,658.			
PASS THROUGH LOSS FROM DISPLAY MATRIX CORPORATION	900099	-1,200.			
PASS THROUGH INCOME FROM JO NO ASSOCIATES, LLC	531120	-298.			
PASS THROUGH INCOME FROM NO JO ASSOCIATES, LLC	531120	24,303.			
TOTAL TO FORM 990-PF, PG 11, LN 11		10,147.			

Realized Capital Gains/Losses

2009

CUSIP/Security Description Quantity	Date Acquired	Date Sold	Sale Proceeds	Original Cost Basis	Adj/Avg Cost Basis	Gain/Loss Orig. Cost	Gain/Loss Adj/Avg Cost
SHORT TERM GAIN LOSS							
001957BC2/AT&T CORP 100000.00	10/23/08	02/03/09	107,206.05	101,458.95	0.00	5,747.10	0.00
05964H105/BANCO SANTANDER SA 0.74	02/04/09	02/12/09	5.65	5.79	0.00	(0.14)	0.00
060505CL6/BANK OF AMERICA CORPORATION 115000.00	11/10/08	09/10/09	111,171.65	103,539.45	0.00	7,632.20	0.00
156700106/CENTURYTEL INCORPORATED 3000.00	09/10/09	12/28/09	107,974.25	94,872.43	0.00	13,101.82	0.00
209111EW9/CONSOLIDATED EDISON COMPANY OF 100000.00	03/26/09	05/05/09	105,138.05	101,687.95	0.00	3,450.10	0.00
314172727/FEDERATED MARKET OPPORTUNITY 1155.81	Various	10/27/09	12,355.63	11,816.91	14,356.46	538.72	(2,000.84)
31428XAP1/FEDEX CORPORATION 100000.00	02/02/09	08/17/09	100,000.00	101,670.95	0.00	(1,670.95)	0.00
100000.00	02/02/09	08/17/09	100,000.00	101,672.95	0.00	(1,672.95)	0.00
SECURITY TOTAL:			200,000.00	203,343.90	0.00	(3,343.90)	0.00
361439763/GAMCO WESTWOOD INTERMEDIATE 269.39	Various	03/26/09	2,885.12	2,816.16	2,836.00	68.96	49.11
880208301/TEMPLETON GLOBAL BOND FUND 1009.91	Various	05/04/09	11,906.89	11,273.00	11,990.63	633.89	(83.74)
949829204/WELLS FARGO CAP XIV, 8 625% EN 4000.00	08/12/08	05/07/09	94,485.03	100,004.95	0.00	(5,519.92)	0.00
SUBTOTAL SHORT TERM GAIN LOSS			753,128.32	730,819.49	29,183.09	22,308.83	(2,035.47)



2009 Realized Capital Gains/Losses (continued)

CUSIP/Security Description Quantity	Date Acquired	Date Sold	Sale Proceeds	Original Cost Basis	Adj/Avg Cost Basis	Gain/Loss Orig. Cost	Gain/Loss Adj/Avg Cost
LONG TERM GAIN LOSS							
060505CL6/BANK OF AMERICA CORPORATION	50000.00	05/19/08	09/10/09	48,335.50	51,886.00	0.00	(3,550.50)
06739H362/BARCLAYS BANK PLC 8.125% PERPE	4000.00	04/08/08	07/28/09	87,705.09	100,004.00	0.00	0.00
300479EK4/EVESHAM TWP NJ BRD ED, GENL	40000.00	10/24/07	03/02/09	40,000.00	40,000.00	0.00	0.00
314172727/FEDERATED MARKET OPPORTUNITY	652.24	Various	10/27/09	6,972.45	7,913.29	0.00	0.00
7323.35	02/19/08	10/27/09	78,286.60	91,688.33	8,101.54	(940.84)	(1,129.09)
20260.66	02/19/08	10/27/09	216,586.42	253,663.43	90,964.11	(13,401.73)	(12,677.52)
SECURITY TOTAL:			301,845.47	353,265.05	251,659.83	(37,077.01)	(35,073.41)
361439763/GAMCO WESTWOOD INTERMEDIATE	16.50	03/04/08	03/26/09	176.70	175.55	0.00	(48,880.02)
8894.35	02/19/08	03/26/09	95,258.53	93,657.55	173.69	1.15	3.01
SECURITY TOTAL:			95,435.23	93,833.10	93,636.06	1,600.98	1,622.46
397028EK3/GREENWICH TWP NJ BRD ED, SCH	50000.00	10/24/07	07/01/09	50,000.00	51,142.50	0.00	1,625.47
45974VA99/INTERNATIONAL LEASE FINANCE CO	50000.00	05/19/08	10/20/09	40,070.05	50,282.00	0.00	0.00
48123W209/JPMORGAN CHASE 6.875% CAP TR X	4000.00	10/24/07	07/06/09	90,818.14	99,840.00	0.00	0.00
4100.00	01/03/08	07/06/09	93,088.60	100,024.30	0.00	(9,021.86)	0.00
SECURITY TOTAL:			183,906.74	199,864.30	0.00	(6,935.70)	0.00
61753R200/MORGAN STANLEY CAPITAL TRUST	2000.00	04/19/07	08/10/09	40,462.98	50,004.00	0.00	0.00

2009 Realized Capital Gains/Losses (continued)

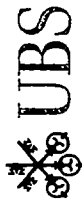
CUSIP/Security Description Quantity	Date Acquired	Date Sold	Sale Proceeds	Original Cost Basis	Adj/Avg Cost Basis	Gain/Loss Orig. Cost	Gain/Loss Adj/Avg Cost
LONG TERM GAIN LOSS							
645916QV2/NEW JERSEY ECONOMIC DEV AUTH R							
100000 00	10/24/07	05/13/09	109,347.05	106,353.00	105,010.70	2994.05	4,336.35
64605KK90/NEW JERSEY ST EDL FACILITIES A							
50000.00	10/24/07	05/13/09	52,999.55	52,460.50	52,168.98	539.05	830.57
845905108/SOVEREIGN BANCORP INCORPORATED							
7350.00	12/31/02	02/04/09	18,533.16	95,515.00	0.00	(76,981.84)	0.00
13744 00	10/24/07	02/04/09	34,655.76	193,652.96	0.00	(158,997.20)	0.00
SECURITY TOTAL:			53,188.92	289,167.96	0.00	(235,979.04)	0.00
880208301/TEMPLETON GLOBAL BOND FUND							
12573.35	04/21/08	05/04/09	148,239.73	150,000.00	149,282.36	(1,760.27)	(1,042.64)
92978U207/WACHOVIA CAP TR IV 6 375%							
3000 00	10/24/07	08/26/09	63,080.10	68,970.00	0.00	(5,889.90)	0.00
4600 00	01/03/08	08/26/09	96,722.81	99,099.52	0.00	(2,376.71)	0.00
SECURITY TOTAL:			159,802.91	168,069.52	0.00	(8,266.61)	0.00
SUBTOTAL LONG TERM GAIN LOSS			1,411,339.22	1,756,963.93	790,997.27	<345,624.71>	(43,130.27)
GRAND TOTAL GAIN/LOSS			2,164,467.54	2,487,783.42	820,180.36	<323,315.88>	(45,165.74)

Claymore

129.50
2,164,597.04

129.50
<323,186.98>





UBS Financial Services Inc
331 NEWMAN SPRINGS ROAD
BUILDING 1, 3RD FLOOR
RED BANK NJ 07701-5688

APZ6001157889 1209 JC 0

2009 Year End Summary

Account name: THE MARION & NORMAN TANZMAN

CHARITABLE FOUNDATION

Account type: PACE Multi

Account number: JC 19310 MF

Your Financial Advisor:

MARK E FUERSTEIN

Phone 732-219-7200/800-221-0705

THE MARION & NORMAN TANZMAN
CHARITABLE FOUNDATION
10 WOODBRIDGE CTR DR
PO BOX 1408
WOODBRIJDGE NJ 07095-1152

Summary of gains and losses

	Amount (\$)
Short term	-366,298 48
Long term	-1,017,934 89
Total	\$-1,384,233.37

Realized gains and losses

Estimated 2009 gains and losses for transactions with trade dates through 12/31/09 have been incorporated into this statement. To calculate gains and losses, we liquidate the oldest security lot first. This is known as the first-in, first-out or FIFO accounting method. We use this method unless you specified which tax lot to close when you placed your order. This is known as a versus purchases or VSP order. See *Important information about your statement* on the last page of this statement for more information.

Short-term capital gains and losses

Security description	Method	Quantity or face value (\$)	Purchase date	Sale date	Purchase amount (\$)	Sale amount (\$)	Loss (\$)	Gain (\$)	Net gain or loss (\$)
ARTIO INTERNATIONAL EQUITY FUND II CLASS I	FIFO	47 312	Oct 24, 08	Jun 12, 09	837 42	504 33	-333 09		
	FIFO	709 935	Dec 31, 08	Jun 12, 09	6,943 15	7,567 72		624 57	

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Member SIPC

00024105 00047905

APZ60003001157889 PZ6000120474 00002 1209 000000000 0 JC MF



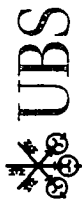
Account name: THE MARION & NORMAN TANZMAN
Account number: JC 19310 MF

Realized gains and losses (continued)

Short-term capital gains and losses (continued)

Security description	Method	Quantity or face value (\$)	Purchase date	Sale date	Sale amount (\$)	Purchase amount (\$)	Loss (\$)	Gain (\$)	Net gain or loss (\$)
BRANDYWINE BLUE FUND									
	FIFO	24,341 321	Jun 18, 08	Jun 12, 09	467,353 36	832,960 00	-365,606 64		1
	FIFO	1,284 117	Oct 15, 08	Jun 12, 09	24,655 05	24,513 79		141 26	1
CALAMOS GLOBAL GROWTH & INCOME FUND A									
	FIFO	1,526 779	Dec 19, 08	Jun 15, 09	12,626 46	10,931 74		1,694 72	
EATON VANCE LARGE CAP VALUE FUND CLASS A									
	FIFO	245 859	Jun 18, 08	Jun 15, 09	3,422 36	5,278 59	-1,856 23		1
KEELEY SMALL CAP VALUE FUND CLASS A									
	FIFO	138 798	Jun 18, 08	Jun 15, 09	2,286 00	4,268 04	-1,982 04		1
LAZARD EMERGING MARKETS FUND INSTITUTIONAL SHS									
	FIFO	685 521	Aug 27, 08	Jun 12, 09	9,934 77	13,820 10	-3,885 33		
	FIFO	1,985 988	Dec 23, 08	Jun 12, 09	28,781 53	21,011 75		7,769 78	
NATIXIS CGM ADVISOR TARGETED EQUITY FUND A									
	FIFO	492 507	Jun 18, 08	Jun 15, 09	3,782 45	6,028 29	-2,245 84		1
THORNBURG INTL VALUE FUND I									
	FIFO	132 743	Jun 30, 08	Jun 12, 09	2,907 03	3,868 13	-961 10		
	FIFO	95 668	Sep 30, 08	Jun 12, 09	2,095 10	2,431 88	-336 78		
	FIFO	51 136	Dec 30, 08	Jun 12, 09	1,119 86	961 87		157 99	
VANGUARD INTERMEDIATE TERM BOND INDEX INVESTOR FUND									
	FIFO	19 932	Jul 20, 09	Sep 04, 09	213 47	207 29		6 18	
	FIFO	0 083	Aug 03, 09	Sep 04, 09	0 89	0 88		0 01	
	FIFO	0 017	Earnings	Sep 04, 09	0 18	0 18			
	FIFO	602 271	Jul 01, 08	Jun 12, 09	6,173 28	6,233 50	-60 22		
	FIFO	626 804	Aug 01, 08	Jun 12, 09	6,424 74	6,462 35	-37 61		
	FIFO	622 140	Sep 02, 08	Jun 12, 09	6,376 94	6,439 15	-62 21		
	FIFO	630 841	Oct 01, 08	Jun 12, 09	6,466 12	6,276 87		189 25	
	FIFO	675 233	Nov 03, 08	Jun 12, 09	6,921 14	6,407 96		513 18	
	FIFO	616 813	Dec 01, 08	Jun 12, 09	6,322 33	6,161 96		160 37	
	FIFO	604 147	Jan 02, 09	Jun 12, 09	6,192 51	6,343 54	-151 03		
	FIFO	619 776	Feb 02, 09	Jun 12, 09	6,352 70	6,396 09	-43 39		
	FIFO	568 592	Mar 02, 09	Jun 12, 09	5,828 07	5,776 89		51 18	
	FIFO	626 922	Apr 01, 09	Jun 12, 09	6,425 95	6,457 30	-31 35		
	FIFO	599 570	May 01, 09	Jun 12, 09	6,145 59	6,163 58	-17 99		

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Resource Management Account

Account name:
Account type:
Account number:

THE MARION & NORMAN TANZMAN
PACE Multi
JC 19310 MF

Your Financial Advisor:
MARK E FUERSTEIN
732-219-7200/800-221-0705

Realized gains and losses (continued)

Short-term capital gains and losses (continued)

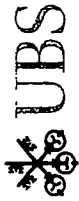
Security description	Method	Quantity or face value (\$)	Purchase date	Sale date	Sale amount (\$)	Purchase amount (\$)	Loss (\$)	Gain (\$)	Net gain or loss (\$)
FIFO		614 375	Jun 01, 09	Jun 12, 09	6,297 34	6,346 49	-49 15		
FIFO		226 825	Oct 24, 08	Jun 12, 09	2,324 96	2,352 18	-27 22		
FIFO		140 779	Dec 23, 08	Jun 12, 09	474 43	394 18		80.25	
Total					\$645,976.66	\$1,012,275.14	-\$377,687.22	\$11,388.74	-\$366,298.48

Long-term capital gains and losses

Security description	Method	Quantity or face value (\$)	Purchase date	Sale date	Sale amount (\$)	Purchase amount (\$)	Loss (\$)	Gain (\$)	Net gain or loss (\$)
ALPINE DYNAMIC DIVIDEND FUND	FIFO	1,925 084	Oct 24, 07	Jun 15, 09	8,900 24	25,243 51	-16,343 27		
ALPINE INTERNATIONAL REAL ESTATE CLASS Y	FIFO	106 433	Oct 24, 07	Jun 15, 09	1,774 42	4,883 15	-3,108 73		
ARTIO INTERNATIONAL EQUITY FUND II CLASS I	FIFO	41 594	Oct 24, 07	Jun 12, 09	443 38	736 20	-292 82		
	FIFO	482 285	Dec 31, 07	Jun 12, 09	5,141 03	8,266 36	-3,125 33		
	FIFO	11,883 120	Oct 24, 07	Jun 12, 09	126,670 93	210,331 10	-83,660 17		
	FIFO	4,534 727	Nov 29, 07	Jun 12, 09	48,339 00	79,856 54	-31,517 54		
	FIFO	322 075	Nov 30, 07	Jun 12, 09	3,433 23	5,700 73	-2,267 50		
	FIFO	843 440	Dec 03, 07	Jun 12, 09	8,990 85	14,878 28	-5,887 43		
	FIFO	1,087 633	Dec 06, 07	Jun 12, 09	11,593 88	19,512 14	-7,918 26		
CALAMOS GLOBAL GROWTH & INCOME FUND A	FIFO	804 549	Oct 24, 07	Jun 15, 09	6,653 62	10,016 64	-3,363 02		
	FIFO	308 154	Oct 27, 07	Jun 15, 09	2,548 43	3,836 52	-1,288 09		
	FIFO	1,261 005	Nov 19, 07	Jun 15, 09	10,428 51	14,451 12	-4,022 61		
	FIFO	116 629	Dec 21, 07	Jun 15, 09	964 52	1,328 40	-363 88		
	FIFO	19,617 339	Oct 24, 07	Jun 15, 09	162,235 39	244,235 87	-82,000 48		
	FIFO	9,407 490	Nov 29, 07	Jun 15, 09	77,799 94	108,750 58	-30,950 64		
	FIFO	11,303 479	Nov 30, 07	Jun 15, 09	93,479 77	131,007 32	-37,527 55		
	FIFO	2,277 787	Dec 03, 07	Jun 15, 09	18,837 30	26,331 22	-7,493 92		
	FIFO	2,856 105	Dec 06, 07	Jun 15, 09	23,619 99	33,387 87	-9,767 88		
EAGLE MID CAP STOCK FUND CLASS A	FIFO	1,016 437	Oct 24, 07	Jun 15, 09	18,692 27	32,890 12	-14,197 85		



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Account name:
Account number:

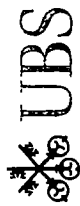
THE MARION & NORMAN TANZMAN
JC 19310 MF

Realized gains and losses (continued)

Long-term capital gains and losses (continued)

Security description	Method	Quantity or face value (\$)	Purchase date	Sale date	Sale amount (\$)	Purchase amount (\$)	Loss (\$)	Gain (\$)	Net gain or loss (\$)
JOHN HANCOCK CLASSIC VALUE FUND CLASS A									
	FIFO	695 778	Oct 24, 07	Jun 15, 09	8,119 73	18,438 84	-10,319 11		
	FIFO	470 317	Oct 24, 07	Jun 15, 09	5,488 60	12,463 40	-6,974 80		
LAZARD EMERGING MARKETS FUND INSTITUTIONAL SHS									
	FIFO	2,227 021	Dec 28, 07	Jun 12, 09	32,274 65	53,136 73	-20,862 08		
	FIFO	14,734 509	Nov 30, 07	Jun 12, 09	213,536 89	395,179 53	-181,642 64		
	FIFO	813 821	Dec 03, 07	Jun 12, 09	11,794 14	21,818 54	-10,024 40		
	FIFO	779 080	Dec 06, 07	Jun 12, 09	11,290 66	21,510 40	-10,219 74		
PERKINS MID CAP VALUE FUND INVESTOR SHARES CLASS J									
	FIFO	234 698	Oct 24, 07	Jun 15, 09	3,893 64	6,151 43	-2,257 79		
R S GLOBAL NATURAL RESOURCES FUND CLASS A									
	FIFO	679 649	Oct 24, 07	Jun 15, 09	16,882 47	26,676 22	-9,793 75		
THORNBURG INTL VALUE FUND I									
	FIFO	297 483	Oct 24, 07	Jun 12, 09	6,514 78	11,122 88	-4,608 10		
	FIFO	684 364	Nov 21, 07	Jun 12, 09	14,987 35	22,755 11	-7,767 76		
	FIFO	19 502	Dec 28, 07	Jun 12, 09	427 09	659 35	-232 26		
	FIFO	7,606 727	Oct 24, 07	Jun 12, 09	166,584 90	284,415 49	-117,830 59		
	FIFO	2,090 940	Nov 29, 07	Jun 12, 09	45,790 92	71,154 70	-25,363 78		
	FIFO	3,821 737	Nov 30, 07	Jun 12, 09	83,694 82	130,550 55	-46,855 73		
	FIFO	755 542	Dec 03, 07	Jun 12, 09	16,546 13	25,884 87	-9,338 74		
	FIFO	903 636	Dec 06, 07	Jun 12, 09	19,789 34	31,211 60	-11,422 26		
VANGUARD INTERMEDIATE TERM BOND INDEX INVESTOR FUND									
	FIFO	6,981 088	Oct 24, 07	Jun 12, 09	71,556 15	72,393 85	-837 70		
	FIFO	365 350	Nov 01, 07	Jun 12, 09	3,744 84	3,770 41	-25 57		
	FIFO	350 048	Dec 03, 07	Jun 12, 09	3,587 99	3,686 01	-98 02		
	FIFO	597 472	Jan 02, 08	Jun 12, 09	6,124 09	6,273 46	-149 37		
	FIFO	593 992	Feb 01, 08	Jun 12, 09	6,088 42	6,367 59	-279 17		
	FIFO	551 268	Mar 03, 08	Jun 12, 09	5,650 50	5,926 13	-275 63		
	FIFO	592 145	Apr 01, 08	Jun 12, 09	6,069 49	6,341 87	-272 38		
	FIFO	577 665	May 01, 08	Jun 12, 09	5,921 07	6,111 70	-190 63		

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Resource Management Account

Account name:
Account type:
Account number:

THE MARION & NORMAN TANZMAN
PACE Multi
JC 19310 MF

Your Financial Advisor:
MARK E FUERSTEIN
732-219-7200/800-221-0705

Realized gains and losses (continued)

Long-term capital gains and losses (continued)

Security description	Method	Quantity or face value (\$)	Purchase date	Sale date	Sale amount (\$)	Purchase amount (\$)	Loss (\$)	Gain (\$)	Net gain or loss (\$)
	FIFO	609 033	Jun 02, 08	Jun 12, 09	6,242.59	6,333.94	-91.35		
	FIFO	80,301 713	Oct 24, 07	Jun 12, 09	823,092.56	832,740.03	-9,647.47		
	FIFO	15,680 301	Nov 29, 07	Jun 12, 09	160,723.09	165,113.57	-4,390.48		
	FIFO	27,795 943	Nov 30, 07	Jun 12, 09	284,908.42	292,691.28	-7,782.86		
	FIFO	7,217 853	Dec 03, 07	Jun 12, 09	73,982.99	76,364.88	-2,381.89		
	FIFO	8,687 850	Dec 06, 07	Jun 12, 09	89,050.46	91,222.43	-2,171.97		
WASHATCH MICRO CAP FUND	FIFO	6,755 068	Jan 02, 08	Jun 12, 09	22,764.58	37,895.93	-15,131.35		
	FIFO	19,755 301	Oct 24, 07	Jun 12, 09	66,575.36	144,411.25	-77,835.89		
	FIFO	1,409 564	Nov 29, 07	Jun 12, 09	4,750.23	9,599.13	-4,848.90		
	FIFO	7,781 227	Nov 30, 07	Jun 12, 09	26,222.73	53,457.03	-27,234.30		
	FIFO	1,417 556	Dec 03, 07	Jun 12, 09	4,777.16	9,639.38	-4,862.22		
	FIFO	2 145 876	Dec 06, 07	Jun 12, 09	7,231.60	14,913.84	-7,682.24		

EKSPORTFINANS ASA

00 000% 063009 DTD120307

FC063009 MTNS SER RTY

FIFO 500,000 000 Nov 28, 07 Jun 30, 09

500,000.00 531,135.00 -31,135.00

Total

\$3,467,227.13 \$4,485,162.02 -\$1,017,934.89

-\$1,017,934.89

Net capital gains/losses:

-\$1,384,233.37

¹ Indicates that the cost basis information has been provided by a source other than UBS Financial Services Inc

