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# Form 990-PF

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

OMB No 1545-0052

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

<u>Fo</u>	r cal	endar	year 2009, or	tax year	beginning		, 2009	, and ending			7	
G	Che	ck al	that apply	Initial	return Init	ıal Return o	f a former p	ublic charity			Fina	al return
				Amer	nded return	Γ	Address	change [	Nam	ne d	change	
_	Use th	. [		7			7.100.000	- I		Ā	Employer identification num	
	ose u R\$ lab	el '	THE IRENE	HERRE	RT ROSS A	ND HARPE	R GRANT	ı	ŀ	•	22-6058004	
	herw				C/O MICHA				ŀ	В	Telephone number (see the	instructions)
	prin	. [	390 GEORGI	E STRE	ET		)	Z		ט	,	mistractions/
Se	or typ e Sne	e. cific   ]	NEW BRUNS	WICK,	NJ 08901-2	2019			ŀ	_	732-545-2250	The state term No.
	tructi			•						C	If exemption application is	· · · —
		<u>L</u>	hima of avana-	-1	V Cartan FO	1727(3)				D	1 Foreign organizations, chec	
Н	ř	_	type of organiz		X Section 50				.		2 Foreign organizations meet here and attach computation	ing the 85% test, check
_				<del></del>	mpt charitable t					Ε	If private foundation status	
'	ra (f	ır marı om Pa	ket value of all ass rt II, column (c), III	sets at end c ne 16)	or year J Acc		thod: XC	ash LIAco	rual	_	under section 507(b)(1)(A)	, check here
		0,,,,				Other (specify				F	If the foundation is in a 60	
<u> </u>	<b>►</b> \$	I A		6,635.		, column (d)	) must be or	n cash basis.)			under section 507(b)(1)(B)	, check here
Pa	ırt I		nalysis of R			(a) Reve	enue and	(b) Net inv	estmer	nt	(c) Adjusted net	(d) Disbursements
		E)	(penses (The	e total of	amounts in may not neces-	expenses	per books	incor	ne		income	for charitable
		sa	rily equal the a	anu (u) i amounts i	ın column (a)							purposes (cash basis only)
			eé the instructi									(cash basis only)
		1			c, received (att sch)							
					ot req to att Sch B							
		3	Interest on sa cash investme		d temporary						-	1
		4	Dividends and int		cocuritios		50,554.		0,55	A	50,554.	<del> </del>
			Gross rents	CICSC IIOIII S	securiues		50,554.		0,33	4.	50,554.	
			Net rental income				-					
9	R	6a	or (loss)	m sale of as	sets not on line 10	_	26,627.					
30	Ë		Gross sales price		339,800.		20,021.				-	
	Σ	7	assets on line 6a Capital gain net in							0.		
		8	Net short-tern		•					<u>.</u>	0.	
	Ü	9	Income-modif	cations	34						<u> </u>	
3	E	TQa	TiOs sales less returns and allowances	) \								
١ ١	_			72								
		b	Less Cost of goods sold 2016									
¥	318	Md	goods sold 2010	(att set)	ł							
Ē	16,1	11	Other income	_(attactfa	chedule)							
K	1	~	COENI	17								
SCANNED	1_		Total Add'un	és 1 throi	ủgh 11		23,927.	5	0,55	4.	50,554.	
<i>⊎D</i>			•		ctors, trustees, etc.		0.					
			Other employee s		•							
			Pension plans		ee benefits							
	A		Legal fees (attach	•	000 0m 1		- 4					
	M		Accounting fees (				3,475.		34			3,128.
0	Ņ		Other prof fees (a	attach sch)	SEE ST 2		12,548.		6,27	<u>4.</u>		6,274.
OPERAT	s T		Interest		CDD CDM 2		206			_		
ķ	R	18 19	Taxes (attach schedule)		SEE STM 3		306.		30	6.		
Ť	Ā	13	Depreciation ( sch) and depl	(attacri etion								•
N N	V	20	Occupancy						-			
Ğ	Ě	21	Travel, confer	ences, ar	nd meetings					_	-	
A N D	E X P	22	Printing and p	oublication	ns		_		_			
Ď		23	Other expense									
	E N			SEE SI	TATEMENT 4		10,110.		1,01	<u>1.</u>		9,099.
	S	24	Total operating	ng and ac	dministrative		06 400		7 00	_		10 501
	S	25	expenses. Ad Contributions, gift				26,439. 76,000.		7,93	<u>8.</u>		18,501.
		25					76,000.					76,000.
		26	Add lines 24 a	es an <b>o di</b> and 25	sbursements.	1	02,439.		7,93	8	0.	94,501.
_		27	Subtract line		ine 12:	<del>-</del>			.,,,,	<del>.</del>	<del> </del>	34,301.
			Excess of rev	enue ove		[	<b></b>					
		_	and disburse				78,512.		<u> </u>	_		
			Net investment in					4	2,61	6.		
		<u>c</u>	Adjusted net inco	me (if negat	tive, enter -0-)			L			50,554.	

Part	11	Balance Sheets  Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year		n year
	-	(See instructions )	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash — non-interest-bearing .	10,883.	6,490.	6,490.
	2	Savings and temporary cash investments	61,603.	32,092.	32,092.
	3	Accounts receivable	<b>.</b>		
	l	Less: allowance for doubtful accounts ▶			
	4	Pledges receivable			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7	Other notes and loans receivable (attach sch)	_		
ŝ		Less: allowance for doubtful accounts ▶			
S	8	Inventories for sale or use		<del> </del>	
A S E T S	9	Prepaid expenses and deferred charges			
S	10	a Investments — U.S. and state government obligations (attach schedule)			
		b Investments — corporate stock (attach schedule)			
	٠	c Investments — corporate bonds (attach schedule)			
	11	Investments — land, buildings, and equipment, basis.			
		Less: accumulated depreciation (attach schedule)			
	12	Investments – mortgage loans			
			1,469,650.	1,425,042.	1,477,053.
	14	Land, buildings, and equipment basis			
		Less: accumulated depreciation (attach schedule)			
	15 16	Other assets (describe)  Total assets (to be completed by all filers — see instructions Also, see page 1, item I)	1,542,136.	1,463,624.	1,515,635.
L	17				2,323,333.
A	18	Grants payable			
B	19	Deferred revenue			
ı.	20	Loans from officers, directors, trustees, & other disqualified persons			
Ī	21	Mortgages and other notes payable (attach schedule)			
T	22	Other liabilities (describe			
E S	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here	0.	<u> </u>	
NF	24	and complete lines 24 through 26 and lines 30 and 31.  Unrestricted			1
N F E U T N	25	Temporarily restricted			
TND		Permanently restricted			
	~	<u> </u>		<del>-</del> -	1
SA		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			}
A B A L A N	27	Capital stock, trust principal, or current funds	1,542,136.	1,463,624.	ı
	28	Paid-in or capital surplus, or land, building, and equipment fund			
O E	29	Retained earnings, accumulated income, endowment, or other funds.			•
R S	30	Total net assets or fund balances (see the instructions)	1,542,136.	1,463,624.	
	31	Total liabilities and net assets/fund balances (see the instructions)	1,542,136.	1,463,624.	
Part	: III	Analysis of Changes in Net Assets or Fund Balanc	es		
1	Tota end-	I net assets or fund balances at beginning of year — Part II, colu of-year figure reported on prior year's return)	umn (a), line 30 (must ag	ree with	1,542,136.
2		r amount from Part I, line 27a		2	-78,512.
3		increases not included in line 2 (itemize)		3	
4	Add	lines 1, 2, and 3	<b></b> .	4	1,463,624.
5	Decre	ases not included in line 2 (itemize)	<b></b> = -	5	
6	Tota	I net assets or fund balances at end of year (line 4 minus line 5)	) - Part II, column (b), Ii	ne 30 <b>6</b>	1,463,624.

Page 2

	990-PF (2009) THE IRENE HERBERT ROSS AND HARPER GRANT 22-6058004		Р	age <b>4</b>
Part		ctions)		
	Exempt operating foundations described in section 4940(d)(2), check here		_	
	Date of ruling or determination letter (attach copy of letter if necessary - see instr.)		_	
	Domestic foundations that meet the section 4940(e) requirements in Part V,		8	52.
	check here    ☐ and enter 1% of Part I, line 27b			ł
С	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable			,
	foundations only. Others enter -0-)			0.
	Add lines 1 and 2		8	352.
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			<u>0.</u>
	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		8	352.
	Credits/Payments.			
	2009 estimated tax pmts and 2008 overpayment credited to 2009 6a 742.			
b	Exempt foreign organizations – tax withheld at source			
С	Tax paid with application for extension of time to file (Form 8868)			[
d	Backup withholding erroneously withheld 6d			
	Total credits and payments Add lines 6a through 6d		7	42.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed   ▶ 9		1	10.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
	Enter the amount of line 10 to be Credited to 2010 estimated tax ► Refunded ► 11			
Part	VII-A Statements Regarding Activities			
	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?	1a	Yes	No X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1 b		х
	If the answer is 'Yes' to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
	Did the foundation file Form 1120-POL for this year?	-		X
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:	1c		
_	(1) On the foundation $\Rightarrow$ 0. (2) On foundation managers $\Rightarrow$ 0			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on	7	.	
	foundation managers \$ 0.			
	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	2		<u> </u>
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	3		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
	If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?	4b	N	/A
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
	If 'Yes,' attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			
	By language in the governing instrument, or			
	<ul> <li>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?</li> </ul>	6	X	د
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	7	X	
	Enter the states to which the foundation reports or with which it is registered (see the instructions)			
	NJ			
	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 <i>General Instruction G</i> <sup>2</sup> <i>If 'No,' attach explanation</i>	8b	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	9		X
	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	10		х
BAA	F	orm 99	0-PF	(2009)

Part IV   Capital Gains and L	<u>-osses for Tax on Investmen</u>	it Income			
(a) List and describe 2-story brick warehous	e the kınd(s) of property sold (e.g , r se; or common stock, 200 shares MI	C Company)	b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a SEE SCHEDULE ATTACH	ED		P	VARIOUS	VARIOUS
b MFS SECURITIES CLAI	M SETTLEMENTS		P	VARIOUS	VARIOUS
c CAPITAL GAIN DISTRI	BUTIONS		P	VARIOUS	VARIOUS
d			•••		
<u>e</u>					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	3	(h) Gain or (e) plus (f) m	(loss) inus (g)
338,740.		366,	427.		-27,68 <u>7</u> .
<b>b</b> 193.					193.
<u> </u>					867.
d			_		
Consolida ambién a carte de					<del></del>
(i) Fair Market Value as of 12/31/69	ing gain in column (h) and owned b (j) Adjusted basis as of 12/31/69	(k) Excess of column (over column (j), if any		<b>(I)</b> Gains (Colt gain minus column (k an -0-) <b>or</b> Losses (fr	(), but not less
a					-27,687.
b					193.
					867.
d					
Capital gain net income or (net)	t capital loss).    If gain, also If (loss), en	enter in Part I, line 7 ter -0- in Part I, line 7	2		-26,627.
3 Net short-term capital gain or (	(loss) as defined in sections 1222(5)	and (6)			
If gain, also enter in Part I, line	e 8, column (c) (see the instructions	) If (loss), enter -0-			
ın Part I, line 8	Section 4940(e) for Reduce		3		-26,627.
If section 4940(d)(2) applies, leave the Was the foundation liable for the section 'Yes,' the foundation does not qual	tion 4942 tax on the distributable ar	omplete this part.		Yes	X No
	n each column for each year; see th		any entries		
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	<b>(c)</b> Net value of noncharitable-use asse	ts (col	<b>(d)</b> Distributior umn (b) divided	
2008	113,382.	1,350,	.079.		
2007	132,153.	1,879,	732.		0.083982
2006	120,369.	1,864,	700		0.083982
2005	102,483.				0.070304
2004		1,774,	848.		0.070304 0.064549 0.057742
	93,994.		848.		0.070304 0.064549
2 Total of line 1, column (d)		1,774,	848.		0.070304 0.064549 0.057742
3 Average distribution ratio for th		1,774, 1,762, otal on line 2 by 5, or by the	433.		0.070304 0.064549 0.057742 0.053332
Average distribution ratio for th number of years the foundation	93, 994.	1,774, 1,762, otal on line 2 by 5, or by the 5 years	, 848. , 433.		0.070304 0.064549 0.057742 0.053332 0.329909 0.065982
Average distribution ratio for th number of years the foundation	93, 994.  se 5-year base period – divide the to has been in existence if less than	1,774, 1,762, otal on line 2 by 5, or by the 5 years	,848. ,433. 		0.070304 0.064549 0.057742 0.053332 0.329909
<ul><li>Average distribution ratio for th number of years the foundation</li><li>Enter the net value of nonchari</li></ul>	93, 994.  ne 5-year base period – divide the to has been in existence if less than stable-use assets for 2009 from Part	1,774, 1,762, otal on line 2 by 5, or by the 5 years	,848. ,433. 2 3		0.070304 0.064549 0.057742 0.053332 0.329909 0.065982 1,492,900.
<ul> <li>Average distribution ratio for th number of years the foundation</li> <li>Enter the net value of noncharing</li> <li>Multiply line 4 by line 3</li> </ul>	93, 994.  ne 5-year base period – divide the to has been in existence if less than stable-use assets for 2009 from Part	1,774, 1,762, otal on line 2 by 5, or by the 5 years	,848. ,433. 2 3 4		0.070304 0.064549 0.057742 0.053332 0.329909 0.065982 1,492,900. 98,505. 426.
<ul> <li>Average distribution ratio for the number of years the foundation</li> <li>Enter the net value of noncharing</li> <li>Multiply line 4 by line 3</li> <li>Enter 1% of net investment incommendation</li> <li>Add lines 5 and 6</li> <li>Enter qualifying distributions from</li> </ul>	93, 994.  The 5-year base period – divide the to has been in existence if less than stable-use assets for 2009 from Part storne (1% of Part I, line 27b)	1,774, 1,762, otal on line 2 by 5, or by the 5 years X, line 5	.848. .433. 2 3 4 5 6 7		0.070304 0.064549 0.057742 0.053332 0.329909 0.065982 1,492,900. 98,505. 426. 98,931. 94,501.
<ul> <li>Average distribution ratio for the number of years the foundation</li> <li>Enter the net value of noncharing</li> <li>Multiply line 4 by line 3</li> <li>Enter 1% of net investment incommendation</li> <li>Add lines 5 and 6</li> <li>Enter qualifying distributions from</li> </ul>	93, 994.  se 5-year base period — divide the to has been in existence if less than stable-use assets for 2009 from Part frome (1% of Part I, line 27b)	1,774, 1,762, otal on line 2 by 5, or by the 5 years X, line 5	.848. .433. 2 3 4 5 6 7		0.070304 0.064549 0.057742 0.053332 0.329909 0.065982 1,492,900. 98,505. 426. 98,931. 94,501.

11 12 13 14 15 Part	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).  Old the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?  Old the foundation comply with the public inspection requirements for its annual returns and exemption which is a single address.  In a single address in care of MICHAEL K RUTTER ESQ Telephon coated at 390 GEORGE STREET NEW BRUNSWICK NJ ZIP + 4.  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 vill-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.  During the year did the foundation (either directly or indirectly):	ne no. ► • _0890	7 <u>32</u> -5 01-201		- <i></i>	x
12 13 14 15 Part	Old the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?  Old the foundation comply with the public inspection requirements for its annual returns and exemption where the foundation comply with the public inspection requirements for its annual returns and exemption when the foundation comply with the public inspection requirements for its annual returns and exemption when the foundation comply with the public inspection requirements for its annual returns and exemption when the foundation comply with the public inspection requirements for its annual returns and exemption when the foundation requirements and exemption applies.  Telephonology and the foundation are insurance contract before and exemption applies.  Telephonology and the foundation comply with the public inspection requirements for its annual returns and exemption applies.	ne no. ► ► _0890	7 <u>32</u> -5 01-201	12 13 45-22	250	
13 14 15 Part	August 17, 2008?  Old the foundation comply with the public inspection requirements for its annual returns and exemption which we have address  In a substitute of the books are in care of the MICHAEL K RUTTER ESQ  Located at the substitute of Substitute	ne no. ► ► _0890	7 <u>32</u> -5 01-201	13 45-22 9	250	
14 15 Part	Website address  The books are in care of MICHAEL K RUTTER ESQ  Located at MICHAEL K RUTTER ESQ  Located at MICHAEL K RUTTER ESQ  Located at MICHAEL K RUTTER ESQ  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  WII-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.	ne no. ► ► _0890	7 <u>32</u> -5 01-201	9	- <i></i>	
15 'art 1a	Located at > 390 GEORGE STREET NEW BRUNSWICK NJ ZIP + 4 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  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.	► <u>089</u> 0	01-201	9	- <i></i>	
art 1a	WII-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.			N/A	•	
Part 1a	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.		5			==
1 a	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.					N/
1 a				Ι -	Yes	No
					163	
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes	XNo			
	2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes	X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	X Yes	∐No		ř	
,	75) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	Yes	XNo		ļ	
,	(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	Yes	XNo			
b	f any answer is 'Yes' to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see the instruc	l tions\2		1 b	i	X
	Organizations relying on a current notice regarding disaster assistance check here.	tions): ►				A
С	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?	5,		1 c	,	Х
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)):					
	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	Yes	XNo			
	f 'Yes,' list the years 20 , 20 , 20					
	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 494 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 494)			-		7.
	all years listed, answer 'No' and attach statement — see the instructions) f the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years	: horo		2b	N	/A
	► 20, 20, 20	ricic				
	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes	X No			
b	f 'Yes,' did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approximately).	n vod	_			
	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)	cu		3ь	N	_ /A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			4a		X
						├^
	Did the foundation make any investment in a prior year (but after December 31, 1969) that could eopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?				-	_

BAA

Form **990-PF** (2009)

Form 990-PF (2009) THE IRENE HERBERT			22-60.	58004	Page 6
Part VII-B   Statements Regarding Activit		<u>n 4720 May Be Req</u>	uired (continued)		
5a During the year did the foundation pay or incu	r any amount to.			.	
(1) Carry on propaganda, or otherwise attempt	ot to influence legislation	on (section 4945(e))?	Yes X	No	
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	lic election (see section ation drive?	n 4955); or to carry	☐ Yes 【X	No	
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	Yes X	No	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	nan a charitable, etc, o 4940(d)(2)? (see instr	rganization described uctions)	Yes X	No	
(5) Provide for any purpose other than religio educational purposes, or for the preventio	us, charitable, scientific n of cruelty to children	c, literary, or or animals?	Yes X	No	'
<b>b</b> If any answer is 'Yes' to 5a(1)-(5), did <b>any</b> of described in Regulations section 53 4945 or in (see instructions)?	the transactions fail to a current notice regar	qualify under the except ding disaster assistance	tions	5b	N/A
Organizations relying on a current notice rega	rding disaster assistani	ce check here	▶ □		
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon	the foundation claim ex sibility for the grant?	emption from the	N/A Yes	No	
If 'Yes,' attach the statement required by Regi	ulations section 53.494	5-5(d)	<u>—</u>		
6a Did the foundation, during the year, receive ar on a personal benefit contract?		37 1 3 1	∐Yes X	No .	
<b>b</b> Did the foundation, during the year, pay prem	iums, directly or indirec	ctly, on a personal benef	fit contract?	6ь	X
If 'Yes' to 6b, file Form 8870.  7a At any time during the tax year, was the found	tation a party to a prob	uhitad tav shaltar transa	ction? Yes X	No	1
<b>b</b> If yes, did the foundation receive any proceed				7b	N/A
Part VIII Information About Officers, D	irectors, Trustees,	Foundation Manag	gers, Highly Paid		
and Contractors					·
1 List all officers, directors, trustees, foundation	1				
(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 other allo	e account, owances
MICHAEL K. RUTTER ESQ.	DIRECTOR	0.	0.		0.
390 GEORGE STREET	1.50				
NEW BRUNSWICK, NJ 08901					
MARK S. STEVENS ESQ.	DIRECTOR	0.	0.		0.
390 GEORGE STREET	0.50				
NEW BRUNSWICK, NJ 08901	2777777			_	
JOHN WEBSTER	DIRECTOR	0.	0.		0.
390 GEORGE STREET	0.50				
NEW BRUNSWICK, NJ 08901					
2 Compensation of five highest-paid employee	os (othor than those in	aludad on line 1 . see in	comunicancy If none	-A INONE !	
(a) Name and address of each employee	(b) Title and average	(c) Compensation	(d) Contributions to		
paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benefit plans and deferred compensation	(e) Expense other allo	wances
NONE			Compensation		
Total number of other employees paid over \$50,000	1				0
BAA	TEEA0306L	07/06/09		Form <b>990</b>	<b>PF</b> (2009)

Total number of others receiving over \$50,000 for professional services   Part IX-B Summary of Direct Charitable Activities  sist the foundation's four lands direct charitable activities using the tax year, clouder elevant statistical information such as the number of Expenses  1 N/A  2  3  4  Part IX-B Summary of Program-Related Investments (see instructions)  Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount  1 N/A  2  Amount  1 N/A  Amount  1 N/A  Amount  1 N/A  All other program-related investments. See instructions  3  Intel® Add lines 1 through 3 ▶ 0.	Part VIII   Information About Officers, Directors, Trustees, Foundation and Contractors (continued)	ı Managers, Highly Paid E	mployees,
(a) Name and address of each person paid more than \$50,000 (b) Type of service (c) Compensation NONE (c) Compe	3 Five highest-paid independent contractors for professional services – (see instruenter 'NONE.'	ctions). If none,	
Total number of others receiving over \$50,000 for professional services   Part IX-A Summary of Direct Charitable Activities  Is productions and other beneficiaries served, conferences convered, research papes produced, etc.  IN/A  2  3  4  Part IX-B Summary of Program-Related Investments (see instructions)  Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2  Amount  All other program-related investments. See instructions  3  All other program-related investments. See instructions  3  Octal Add lines 1 through 3  Octal Add lines 1 through 3	(a) Name and address of each person paid more than \$50,000		(c) Compensation
Total number of others receiving over \$50,000 for professional services   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 Expenses  1   N/A   Expenses  2   Summary of Program-Related Investments (see instructions)  Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2   Amount 1   N/A     2        All other program-related investments. See instructions   3      All other program-related investments. See instructions   0      Total Add lines 1 through 3   ▶ 0   0   0   0    Part IX-B   Summary of Program-related investments. See instructions   0   0   0    Part IX-B   Summary of Program-related investments made by the foundation during the tax year on lines 1 and 2   Amount   0   0   0    All other program-related investments. See instructions   0   0   0   0   0   0   0    Part IX-B   Summary of Program-related investments made by the foundation during the tax year on lines 1 and 2   0   0   0   0   0   0   0   0   0	NONE		
Total number of others receiving over \$50,000 for professional services   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 Expenses  1   N/A   Expenses  2   Summary of Program-Related Investments (see instructions)  Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2   Amount 1   N/A     2        All other program-related investments. See instructions   3      All other program-related investments. See instructions   0      Total Add lines 1 through 3   ▶ 0   0   0   0    Part IX-B   Summary of Program-related investments. See instructions   0   0   0    Part IX-B   Summary of Program-related investments made by the foundation during the tax year on lines 1 and 2   Amount   0   0   0    All other program-related investments. See instructions   0   0   0   0   0   0   0    Part IX-B   Summary of Program-related investments made by the foundation during the tax year on lines 1 and 2   0   0   0   0   0   0   0   0   0			
Total number of others receiving over \$50,000 for professional services   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 Expenses  1   N/A   Expenses  2   Summary of Program-Related Investments (see instructions)  Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2   Amount 1   N/A     2        All other program-related investments. See instructions   3      All other program-related investments. See instructions   0      Total Add lines 1 through 3   ▶ 0   0   0   0    Part IX-B   Summary of Program-related investments. See instructions   0   0   0    Part IX-B   Summary of Program-related investments made by the foundation during the tax year on lines 1 and 2   Amount   0   0   0    All other program-related investments. See instructions   0   0   0   0   0   0   0    Part IX-B   Summary of Program-related investments made by the foundation during the tax year on lines 1 and 2   0   0   0   0   0   0   0   0   0			
Total number of others receiving over \$50,000 for professional services   Part IX-A   Summary of Direct Charitable Activities  Is the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of grammations and other beneficiaries served, conferences convened, research papers produced, etc.    N/A			
Total number of others receiving over \$50,000 for professional services   Part IX-A   Summary of Direct Charitable Activities  Is the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of grammations and other beneficiaries served, conferences convened, research papers produced, etc.    N/A			
Part IX-B Summary of Direct Charitable Activities  Lest the foundation's four largest direct charitable activities during the tax year, include relevant statistical information such as the number of reginations and other beneficiaries served, conferences convened, research papers produced, etc.  1			
Part IX-B Summary of Direct Charitable Activities  Lest the foundation's four largest direct charitable activities during the tax year, include relevant statistical information such as the number of reginations and other beneficiaries served, conferences convened, research papers produced, etc.  1			
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Part IX-B Summary of Program-Related Investments (see Instructions)  Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2  Amount  Amount  All other program-related investments. See instructions  All other program-related investments. See instructions  O.	Part IX-A Summary of Direct Charitable Activities		
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Part IX-B Summary of Program-Related Investments (see Instructions)  Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2  Amount  All other program-related investments. See instructions  Total. Add lines 1 through 3	1 N/A		
Part IX-B Summary of Program-Related Investments (see Instructions)  Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2  All other program-related investments. See instructions  3			
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Part IX-B Summary of Program-Related Investments (see Instructions)  Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2  Amount  2  All other program-related investments. See instructions  3  Total. Add lines 1 through 3  ▶ 0.			
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2  Amount  2  All other program-related investments. See instructions  3  Total. Add lines 1 through 3	4		
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2  Amount  2  All other program-related investments. See instructions  3  Total. Add lines 1 through 3			
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2 All other program-related investments. See instructions 3	Part IX-B Summary of Program-Related Investments (see instructions	)	
All other program-related investments. See instructions  3  Total. Add lines 1 through 3	Describe the two largest program-related investments made by the foundation during the	tax year on lines 1 and 2	Amount
All other program-related investments. See instructions  3  Total. Add lines 1 through 3  0.	1 <u>N/A</u>		
All other program-related investments. See instructions  3  Total. Add lines 1 through 3  0.			
3	2		
3			
3	All other program related investments. See instructions		
	Total Add lines 1 through 2		
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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 1 a 1,460,100. b Average of monthly cash balances 1 b 8,687. c Fair market value of all other assets (see instructions) 1 c 46,848. d Total (add lines 1a, b, and c) 1 d 1,515,635. e Reduction claimed for blockage or other factors reported on lines 1a and 1c 0. (attach detailed explanation) 1 e Acquisition indebtedness applicable to line 1 assets 2 n 3 Subtract line 2 from line 1d 3 1,515,635. Cash deemed held for charitable activities. Enter 1-1/2% of line 3 22,735. (for greater amount, see instructions) Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4 5 492,900. Minimum investment return. Enter 5% of line 5 6 74,645. 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 74,645. 2a Tax on investment income for 2009 from Part VI, line 5 852 2a b Income tax for 2009. (This does not include the tax from Part VI) 2b c Add lines 2a and 2b 2 c 852 3 Distributable amount before adjustments. Subtract line 2c from line 1 73.793 3 4 Recoveries of amounts treated as qualifying distributions 4 Add lines 3 and 4 5 73,793. Deduction from distributable amount (see instructions) 6 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1 7 73,793. Part XII | Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc. purposes: a Expenses, contributions, gifts, etc - total from Part I, column (d), line 26 94,501. 1 a b Program-related investments - total from Part IX-B 1 b 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) За **b** Cash distribution test (attach the required schedule) 3ь Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 4 94,501 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions) 5 Adjusted qualifying distributions, Subtract line 5 from line 4 6 94,501 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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	<b>(c)</b> 2008	<b>(d)</b> 2009
1 Distributable amount for 2009 from Pa	ırt XI,			72 702
2 Undistributed income, if any, as of the end of 20	09:			73,793.
a Enter amount for 2008 only			- o.	
<b>b</b> Total for prior years: 20, 20 , 20		0.	. —	· · · · · · · · · · · · · · · · · · ·
3 Excess distributions carryover, if any, to 2009:				
	,306.			
	<u>, 958 .</u>			
	, 384.			
· · · · · · · · · · · · · · · · · · ·	,366.			
	,794.			
f Total of lines 3a through e	143,808.			
4 Qualifying distributions for 2009 from I XII, line 4: ► \$ 94,50				
a Applied to 2008, but not more than lin			<del>-</del>	
, , , , , , , , , , , , , , , , , , , ,			U.	. —
<ul> <li>Applied to undistributed income of pri (Election required — see instructions)</li> </ul>	or years	0.		
<ul> <li>Treated as distributions out of corpus (Election required — see instructions)</li> </ul>	0.			
<b>d</b> Applied to 2009 distributable amount				73,793.
e Remaining amount distributed out of c		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d),	0.			0.
same amount must be shown in colun				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	164,516.			
<b>b</b> Prior years' undistributed income Sub line 4b from line 2b	tract	0.		
c Enter the amount of prior years' undis	tribut-			
ed income for which a notice of deficie has been issued, or on which the sect	ency			
4942(a) tax has been previously asses		0.		j
<b>d</b> Subtract line 6c from line 6b Taxable				
amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a	from			1
line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2009 Subtra	ct lines			
4d and 5 from line 1. This amount mu				
distributed in 2010	<u> </u>			0.
7 Amounts treated as distributions out o corpus to satisfy requirements impose				
by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
,				
8 Excess distributions carryover from 20 applied on line 5 or line 7 (see instruc				
9 Excess distributions carryover to 201 Subtract lines 7 and 8 from line 6a	<b>0.</b> 155,210.			
10 Analysis of line 9:				
<del></del>	, 958.			
	, 384.			
	, 366.		-	
	794.			
e Excess from 2009 20	,708.			Form 000 BF (2000)

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Part XIV   Private Operating Foundati					N/A
1a If the foundation has received a ruling or is effective for 2009, enter the date of the	ruling .	•	· -	_	
<b>b</b> Check box to indicate whether the founda		erating foundation de		4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year	(L) 0000	Prior 3 years	(4) 2000	
investment return from Part X for each year listed .	(a) 2009	<b>(b)</b> 2008	(c) 2007	(d) 2006	(e) Total
<b>b</b> 85% of line 2a		<del>                                     </del>			
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					
<ul> <li>Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c</li> </ul>					
3 Complete 3a, b, or c for the alternative test relied upon:					
a 'Assets' alternative test — enter					
(1) Value of all assets					<u> </u>
(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					
<ol> <li>Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)</li> </ol>					
(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 assets at any time during the	(Complete this ne year – see in	part only if the ostructions.)	organization ha	id \$5,000 or moi	e in
Information Regarding Foundation Mana a List any managers of the foundation who close of any tax year (but only if they hav NONE	have contributed m	ore than 2% of the to than \$5,000) (See s	otal contributions re section 507(d)(2))	eceived by the found	dation before the
<b>b</b> List any managers of the foundation who a partnership or other entity) of which the NONE	own 10% or more of foundation has a 1	of the stock of a corp 0% or greater intere	oration (or an equa st	ally large portion of	the ownership of
2 Information Regarding Contribution, Gra Check here ▶ ☐ If the foundation only i requests for funds If the foundation make complete items 2a, b, c, and d	makes contributions	s to preselected char	itable organizations	s and does not acce	pt unsolicited er conditions,
a The name, address, and telephone numb	er of the person to	whom applications s	hould be addressed	1	
SEE STATEMENT 6					
<b>b</b> The form in which applications should be	submitted and info	rmation and material	s they should inclu	de:	
SEE STATEMENT FOR LINE 2A					
c Any submission deadlines:		<del></del>	<del></del>		
SEE STATEMENT FOR LINE 2A					
d Any restrictions or limitations on awards,	such as by geograp	ohical areas, charitat	ole fields, kinds of i	nstitutions, or other	factors:
SEE STATEMENT FOR LINE 2A					

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3 Grants and Contributions Paid During the Yo	ear or Approved for Fut	ure Paymen	nt	· <del></del>
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	substantial contributor	recipient	Contribution	
a Paid during the year	substantial contributor	Гесіріен		
Total			► 3a	
b Approved for future payment  Total			► 3b	

Part XVI-A	Analy	sis of	Income	-Producing	<b>Activities</b>

2	ross amounts unless otherwise indicated.		ed business income		section 512, 513, or 514	
<b>1</b> P	rogram service revenue:	(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion code	<b>(d)</b> Amount	(e) Related or exempt function income (see the instructions)
			<del></del>	1		(444 Michaellons)
b_						
c_						
<b>d</b> _						
e_						
, - 	ees and contracts from government agencies			-		
	lembership dues and assessments			+ +		
	terest on savings and temporary cash investments	,				
	ividends and interest from securities			14	50,554.	
	et rental income or (loss) from real estate			1 -	55/55 11	
	ebt-financed property					
bΝ	ot debt-financed property					
	et rental income or (loss) from personal property					
	ther investment income					
	ain or (loss) from sales of assets other than inventory		<u> </u>	1	-26,627.	_
	et income or (loss) from special events		<del></del>	<del>                                     </del>		
	ross profit or (loss) from sales of inventory			<del> </del>		
				1		
_				+ +		
			<del></del> -			
d_						
e_						
	ubtotal Add columns (b), (d), and (e)		·		23,927.	
13 T					13	23,927.
	otal. Add line 12, columns (b), (d), and (e)				13	23,921.
	otal. Add line 12, columns (b), (d), and (e) orksheet in the instructions for line 13 to verify ca	alculations)				23,921.
See w			ishment of Exemp	ot Purpose		23,921.
See w	orksheet in the instructions for line 13 to verify ca	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part >	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	
See w Part > Line I	Relationship of Activities to the Explain below how each activity for which in accomplishment of the foundation's exempt	Accompl	<u>.</u>	<u> </u>	9S	

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

						· <u> </u>		<u> </u>		Yes	No
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?											
a Transfers from the reporting foundation to a noncharitable exempt organization of:											
	<b>(1)</b> C		, roundation to		io exempt organ	nzation or.	•		1a (1)	- 1	x
	• •	other assets							1a (2)		X
b Other transactions.											
(1) Sales of assets to a noncharitable exempt organization											Х
(2) Purchases of assets from a noncharitable exempt organization											X
(3) Rental of facilities, equipment, or other assets											X
(4) Reimbursement arrangements											X
(5) Loans or loan guarantees .											X
		erformance of services		ip or fundraisi	ng solicitations				1 b (5) 1 b (6)		X
		ng of facilities, equipm			-	lovees			1c		X
			_			•		ı			
	the a	answer to any of the a oods, other assets, or s ransaction or sharing a	services given	by the reporting	na foundation. It	f the found	ation received I	ess than fair market	t value in	ue of	
(a	) Line no	(b) Amount involved			cempt organization		•	nsfers, transactions, and		naemen!	ts
	/A		(3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3, 3				<u>/</u>	, , , , , , , , , , , , , , , , , , , ,		-go-moni	
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										,	
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							-				
	_								<del></del>		
	descr	foundation directly or ibed in section 501(c) of s,' complete the followi	of the Code (o	ated with, or re ther than secti	elated to, one o on 501(c)(3)) or	r more tax r in section	-exempt organi 527?	zations	Yes	s X	No
_		(a) Name of organizati		<b>(b)</b> Tv	pe of organizat	ion	(4	c) Description of rela			
N	/A	<u></u>			po or organizati			y Description of Tele	попоп		
					•						
	Under pend complete	alties of perjury, I declare that Declaration of preparer (other to	1 have examined that taxpayer or fice	is return, including luciary) is based or	accompanying scheon all information of wi	dules and state hich preparer l	ements, and to the b	est of my knowledge and t	pelief, it is tru	ie, corre	ct, and
s	► × /keln/ / hilles  X 5/14/10 > DIR						► DIRECTOR				
S I G	Sign	ature of officer or trustee	·			Date		Title			
		Preparer's Check if See Section 1							erer's Identify		
H E R E	Paid							Signature iń 0018378		5)	
E	Pre- parer's	Firm's name (or THE	HERMES GR	OUP LLP	<del>- [                                   </del>		1 . 5/10	employed ► PUC			
	Use	Luciure of colf ` >	ROUTE 1	2ND FL	<del></del>			15 503	,3200		
	Only		CETON, NJ		-			Phone no ► (60	9) 924	-720	ın
BA	AA	1 == 0000	,		<del>-</del>		<del></del>	Trilone no - 100	Form <b>99</b>		
	•								1 01111 33	O-1 L (	(たいいコ)

## 2009

## FEDERAL SUPPLEMENTAL INFORMATION

THE IRENE HERBERT ROSS AND HARPER GRANT ROSS FOUNDATION C/O MICHAEL K RUTTER ESQ PAGE 1

22-6058004

STATEMENT REGARDING OTHER EXPENSES AND PAYMENT TO DISQUALIFIED PERSON SEE STATEMENT #4 AND PART VII-B 1A(4)

DURING 2009, THE FOUNDATION PAID \$10,000 TO THE LAW FIRM OF WATSON, STEVENS, RUTTER & ROY, LLP FOR OFFICE AND BOOKKEEPING SERVICES OF WHICH TWO OF THE DIRECTORS, MICHAEL K. RUTTER AND MARK S. STEVENS ARE ALSO MEMBERS OF THE FIRM. THESE BENEFITS RECEIVED BY THE LAW FIRM AND INDIRECTLY BY THE DISQUALIFIED PERSONS DO NOT EXCEED THE VALUE OF THE BENEFITS THE PRIVATE FOUNDATION RECEIVED IN THE EXCHANGE.

2009

## **FEDERAL STATEMENTS**

THE IRENE HERBERT ROSS AND HARPER GRANT ROSS FOUNDATION C/O MICHAEL K RUTTER ESQ PAGE 2

22-6058004

STATEMENT 5 **FORM 990-PF, PART I, LINE 25 CONTRIBUTIONS, GIFTS, AND GRANTS** 

CASH GRANTS AND ALLOCATIONS

CLASS OF ACTIVITY:

DONEE'S NAME: DONEE'S ADDRESS:

SEE SCHEDULE ATTACHED

RELATIONSHIP OF DONEE:

ORGANIZATIONAL STATUS OF DONEE:

AMOUNT GIVEN:

76,000.

TOTAL \$ 76,000.

**STATEMENT 6** FORM 990-PF, PART XV, LINE 2A-D APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:

NAME:

CARE OF:

MICHAEL K. RUTTER ESQ. 390 GEORGE STREET NEW BRUNSWICK, NJ 08901

STREET ADDRESS:

CITY, STATE, ZIP CODE: TELEPHONE:

732-545-2250

FORM AND CONTENT:

REQUEST MAY BE VERBAL OR WRITTEN AND DESCRIBE THE USE OF

THE GRANT

SUBMISSION DEADLINES:

RESTRICTIONS ON AWARDS:

NONE PREFERENCE GIVEN TO NEW JERSEY AND CONNECTICUT

ORGANIZATIONS BUT OTHERS MAY QUALIFY

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# **FEDERAL STATEMENTS**

PAGE 1

THE IRENE HERBERT ROSS AND HARPER GRANT ROSS FOUNDATION C/O MICHAEL K RUTTER ESQ

22-6058004

<b>STATEMENT 1</b>				
<b>FORM 990-PF</b> ,	<b>PART</b>	١,	LINE	16B
<b>ACCOUNTING</b>	FEES			

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
 FEES FOTAL	\$ 3,475. \$ 3,475.	\$ 347. \$ 347.	\$ 0.	\$ 3,128. \$ 3,128.

#### STATEMENT 2 FORM 990-PF, PART I, LINE 16C OTHER PROFESSIONAL FEES

		(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	TOTAL	\$ 12,548. \$ 12,548.	\$ 6,274. \$ 6,274.	\$ 0.	\$ 6,274. \$ 6,274.

### STATEMENT 3 FORM 990-PF, PART I, LINE 18 TAXES

		(A)	(B) NET	(C)	(D)
		EXPENSES	INVESTMENT	ADJUSTED	CHARITABLE
		PER BOOKS	INCOME	<u>NET INCOME</u>	<u>PURPOSES</u>
FOREIGN TAX	PAID ON DIVIDEND INCOM	E			
	TOTAL	\$ 306. \$ 306.	\$ 306. \$ 306.	\$ 0.	\$ 0.

#### STATEMENT 4 FORM 990-PF, PART I, LINE 23 OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED <u>NET INCOME</u>	(D) CHARITABLE PURPOSES
MISCELLANEOUS FEES OFFICE & BOOKKEEPING SERVICES-SEE	\$ 110. STATEM	\$ 11.		\$ 99.
TOTAL	10,000.	1,000. \$ 1,011.	\$ 0.	9,000. \$ 9,099.