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## Return of Private Foundation

OMB No 1545-0052

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 GROSSMAN FAMILY FOUNDATION

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

Room/suite

C/O WTAS LLC, 1700 EAST PUTNAM AVENUE

206

City or town, state, and ZIP code

OLD GREENWICH, CT 06870

A Employer identification number

26-3919092

B Telephone number

631-231-0400

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

H Check type of organization

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

I Fair market value of all assets at end of year

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

\$ 142,227,160. (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)

1 Contributions, gifts, grants, etc., received

2 Check ☒ if the foundation is not required to attach Sch B3 Interest on savings and temporary  
cash investments

396,075.

246,361.

STATEMENT 1

4 Dividends and interest from securities

3,876,301.

3,876,301.

STATEMENT 2

5a Gross rents

b Net rental income or (loss)

1,185,197.

6a Net gain or (loss) from sale of assets not on line 10

b Gross sales price for all  
assets on line 6a 43,864,730.

7 Capital gain net income (from Part IV, line 2)

1,185,197.

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns  
and allowances

b Less post-1969 goods sold

c Gross profit or (loss)

-5,506.

7,691.

STATEMENT 3

11 Other income

5,452,067.

5,315,550.

12 Total Add lines 1 through 11

13 Compensation of officers, directors, trustees, etc

0.

0.

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees

STMT 4

11,192.

0.

11,192.

b Accounting fees

STMT 5

5,000.

2,500.

2,500.

c Other professional fees

STMT 6

18,716.

14,038.

4,678.

17 Interest

17,201.

17,201.

0.

18 Taxes

STMT 7

15,961.

15,961.

0.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses

STMT 8

30,216.

21,047.

8,244.

24 Total operating and administrative  
expenses. Add lines 13 through 23

98,286.

70,747.

26,614.

25 Contributions, gifts, grants paid

132,708.

132,708.

26 Total expenses and disbursements.

Add lines 24 and 25

230,994.

70,747.

159,322.

27 Subtract line 26 from line 12

a Excess of revenue over expenses and disbursements

5,221,073.

b Net investment income (if negative, enter -0-)

5,244,803.

c Adjusted net income (if negative, enter -0-)

N/A

SCANNED AUG 16 2010

Operating and Administrative Expenses

6147

**Part II** Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	130,007,577.	642,314.	642,314.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - US and state government obligations			
	b Investments - corporate stock STMT 9	0.	7,049,756.	8,062,798.
	c Investments - corporate bonds STMT 10	0.	121,080,125.	127,529,574.
11 Investments - land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 11	0.	5,992,895.	5,992,474.	
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	130,007,577.	134,765,090.	142,227,160.	
<b>Liabilities</b>	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.	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	130,007,577.	134,765,090.	
30 Total net assets or fund balances	130,007,577.	134,765,090.		
31 Total liabilities and net assets/fund balances	130,007,577.	134,765,090.		

**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	130,007,577.
2 Enter amount from Part I, line 27a	2	5,221,073.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	135,228,650.
5 Decreases not included in line 2 (itemize) ▶ DIVIDENDS IN TRANSIT	5	463,560.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	134,765,090.

**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 43,864,730.		42,679,533.	1,185,197.

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			1,185,197.

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	1,185,197.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8	{ }	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	0.	128,057,462.	.000000
2007			
2006			
2005			
2004			

2 Total of line 1, column (d)	2	.000000
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	.000000
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	133,049,007.
5 Multiply line 4 by line 3	5	0.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	52,448.
7 Add lines 5 and 6	7	52,448.
8 Enter qualifying distributions from Part XII, line 4	8	159,322.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <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	52,448.
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	63.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		3	52,511.
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	52,511.
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 15,000.		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c 60,000.		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d		7	75,000.
8 Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	22,489.
11 Enter the amount of line 10 to be Credited to 2010 estimated tax	22,489. Refunded	11	0.

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see 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
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	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 type="checkbox"/> CT		
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

Form 990-PF (2009)

**Part VII-A Statements Regarding Activities** (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address **▶** N/A

14 The books are in care of **▶ STEVEN GROSSMAN** Telephone no **▶ 631-231-0400**  
 Located at **▶ C/O WTAS LLC, 1700 EAST PUTNAM AVENUE, SUITE 206,** ZIP+4 **▶ 06870**

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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years <b>▶</b> _____		
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 <b>▶</b> _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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

Form 990-PF (2009)

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here ☐

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
STEVEN GROSSMAN C/O WTAS LLC, 1700 EAST PUTNAM AVENUE OLD GREENWICH, CT 06870	TRUSTEE  10.00	0.	0.	0.

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

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

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

0

Form 990-PF (2009)





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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	82,192,936.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	52,882,198.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	Total (add lines 1a, b, and c)	<b>1d</b>	135,075,134.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	135,075,134.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	2,026,127.
<b>5</b>	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	133,049,007.
<b>6</b>	Minimum investment return. Enter 5% of line 5	<b>6</b>	6,652,450.

**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)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	6,652,450.
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	52,511.
<b>b</b>	Income tax for 2009 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	52,511.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	6,599,939.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	6,599,939.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	6,599,939.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	159,322.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	159,322.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	52,448.
<b>6</b>	Adjusted qualifying distributions. Subtract line 5 from line 4	<b>6</b>	106,874.

**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				6,599,939.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			157,743.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 159,322.				
a Applied to 2008, but not more than line 2a			157,743.	
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				1,579.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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				6,598,360.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				



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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i> TEMPLE BETH ELOHIM 926 ROUND SWAMP ROAD OLD BETHPAGE, NY 11804	N/A	EXEMPT ORG. UNDER 501(C)(3)	GENERAL PURPOSE	128,108.
ABERCROMBIE & KENT PHILANTHROPY 1411 OPUS PLACE DOWNERS GROVE, IL 60515	N/A	EXEMPT ORG. UNDER 501(C)(3)	GENERAL PURPOSE	900.
24 HOURS OF BOOTY, INC. 500 E. MOREHEAD, SUITE 318 CHARLOTTE, NC 28202	N/A	EXEMPT ORG. UNDER 501(C)(3)	GENERAL PURPOSE	500.
HALO FOUNDATION 1330 BOYLSTON ST. CHESTNUT HILL, MA 02467	N/A	EXEMPT ORG. UNDER 501(C)(3)	GENERAL PURPOSE	1,000.
THE GREENWICH JEWISH STUDY GROUP, INC. 5 HIGHVIEW AVENUE OLD GREENWICH, CT 06870	N/A	EXEMPT ORG. UNDER 501(C)(3)	GENERAL PURPOSE	1,200.
THE UNIVERSITY OF VERMONT 85 SOUTH PROSPECT STREET BURLINGTON, VT 05401	N/A	EXEMPT ORG. UNDER 501(C)(3)	EDUCATION	1,000.
<b>Total</b>			<b>3a</b>	<b>132,708.</b>
<i>b Approved for future payment</i>  NONE				
<b>Total</b>			<b>3b</b>	<b>0.</b>



## Part XVII

- |       | Yes | No |
|-------|-----|----|
| 1a(1) |     | X  |
| 1a(2) |     | X  |
| 1b(1) |     | X  |
| 1b(2) |     | X  |
| 1b(3) |     | X  |
| 1b(4) |     | X  |
| 1b(5) |     | X  |
| 1b(6) |     | X  |
| 1c    |     | X  |

[illegible]

- ☐ Yes ☒ No

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

Form **990-PF** (2009)

THE GROSSMAN FAMILY FOUNDATION

**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	CREDIT SUISSE #214-366585 (SEE ATTACHED)	P	VARIOUS	VARIOUS
b	2,341,392.546 SHS WELLS FARGO ADVANTAGE ULTRA SHT	P	VARIOUS	VARIOUS
c	UBS #MW 33326 KR (SEE ATTACHED)	P	VARIOUS	VARIOUS
d	UBS #MW 33328 KR (SEE ATTACHED)	P	VARIOUS	VARIOUS
e	5,945,772.17 SHS FIDELITY ADVISOR PRIME MONEY MKT	P	VARIOUS	VARIOUS
f	ABBEY CAPITAL MULTI-MANAGER FUND, LTD.	P	VARIOUS	VARIOUS
g	ABBEY CAPITAL MULTI-MANAGER FUND, LTD.	P	VARIOUS	VARIOUS
h	UBS PAULSON ADVANTAGE, LLC	P	VARIOUS	VARIOUS
i	UBS PAULSON ADVANTAGE, LLC	P	VARIOUS	VARIOUS
j	CAPITAL GAINS DIVIDENDS			
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 26,402,174.		25,298,807.	1,103,367.
b 11,232,310.		11,181,489.	50,821.
c 161,524.		149,501.	12,023.
d 106,991.		101,610.	5,381.
e 5,933,789.		5,945,772.	-11,983.
f 17,222.			17,222.
g		2,354.	-2,354.
h 9,128.			9,128.
i 947.			947.
j 645.			645.
k			
l			
m			
n			
o			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			1,103,367.
b			50,821.
c			12,023.
d			5,381.
e			-11,983.
f			17,222.
g			-2,354.
h			9,128.
i			947.
j			645.
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	1,185,197.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8	3	N/A

Recipient's Name and Address:  
THE GROSSMAN FAMILY FOUNDATION  
UAD 12/23/08

Account Number 214-366585  
Recipient's Identification  
Number 26-3919092

2009 TAX and  
YEAR-END STATEMENT

SCHEDULE of REALIZED GAINS and LOSSES

Disposition Date	Acquisition Date	Closing Transaction	Description	Security Identifier	Quantity	Cost Basis	Proceeds	Realized Gain/Loss
Short Term 03/09/09	03/05/09	SELL	GENERAL ELEC CAP CORP MEDIUM TERM NTS Original Cost Basis 5,012,500.00	36962GUL6	5,000,000.000	5,012,400.00	5,000,000.00	(12,400.00)
05/11/09	01/14/09	SELL	PPSAX PRINCIPAL PREFERRED SECURITIES	PPSAX	714,285.714	5,000,005.00	5,057,142.86	57,137.86
05/11/09	01/30/09	SELL	PPSAX PRINCIPAL PREFERRED SECURITIES	PPSAX	4,621.848	29,857.14	32,722.68	2,865.54



Recipient's Name and Address:

THE GROSSMAN FAMILY FOUNDATION  
UAD 12/23/08

Account Number: 214-366585

Recipient's Identification  
Number 26-3919092

# 2009 TAX and YEAR-END STATEMENT

## TRANSACTIONS WE DO NOT REPORT TO THE IRS

### SCHEDULE OF REALIZED GAINS and LOSSES

(Continued)

(Continued)

Disposition Date	Acquisition Date	Closing Transaction	Description	Security Identifier	Quantity	Cost Basis	Proceeds	Realized Gain/Loss
05/11/09	02/27/09	SELL	PRINCIPAL PREFERRED SECURITIES	PPSAX	5,693,007	30,913.03	40,306.49	9,393.46
05/11/09	03/31/09	SELL	PRINCIPAL PREFERRED SECURITIES	PPSAX	5,735,893	32,751.95	40,610.12	7,858.17
05/11/09	04/30/09	SELL	PRINCIPAL PREFERRED SECURITIES	PPSAX	5,132,706	33,157.28	36,339.56	3,182.28
08/25/09	01/14/09	SELL	FIDELITY ADVISOR FLOATING RATE HIGH	FFRAX	636,132.316	5,000,005.00	5,865,139.95	865,134.95
08/25/09	01/30/09	SELL	FIDELITY ADVISOR FLOATING RATE HIGH	FFRAX	650,597	5,243.81	5,998.50	754.69
08/25/09	02/27/09	SELL	FIDELITY ADVISOR FLOATING RATE HIGH	FFRAX	1,311,120	10,606.96	12,088.53	1,481.57
08/25/09	03/31/09	SELL	FIDELITY ADVISOR FLOATING RATE HIGH	FFRAX	1,428,597	11,700.21	13,171.66	1,471.45
08/25/09	04/30/09	SELL	FIDELITY ADVISOR FLOATING RATE HIGH	FFRAX	1,329,152	11,430.71	12,254.78	824.07
08/25/09	05/29/09	SELL	FIDELITY ADVISOR FLOATING RATE HIGH	FFRAX	1,417,157	12,385.95	13,066.19	680.24
08/25/09	06/30/09	SELL	FIDELITY ADVISOR FLOATING RATE HIGH	FFRAX	1,308,762	11,674.16	12,066.79	392.63
08/25/09	07/31/09	SELL	FIDELITY ADVISOR FLOATING RATE HIGH	FFRAX	1,299,975	11,959.77	11,985.77	26.00
11/11/09	08/25/09	SELL	LORD ABBETT HIGH YIELD MUNICIPAL	HYMAX	478,468.900	5,000,000.00	5,339,712.92	339,712.92
11/16/09	09/03/09	SELL	LORD ABBETT HIGH YIELD MUNICIPAL	HYMAX	371,303	4,006.36	4,125.18	118.82
11/16/09	10/05/09	SELL	LORD ABBETT HIGH YIELD MUNICIPAL	HYMAX	2,608,075	30,071.10	28,975.71	(1,095.39)
11/16/09	10/06/09	SELL	LORD ABBETT HIGH YIELD MUNICIPAL	HYMAX	434,404.865	5,000,000.00	4,826,238.05	(173,761.95)
11/16/09	10/30/09	SELL	LORD ABBETT HIGH YIELD MUNICIPAL	HYMAX	3,591,478	40,224.55	39,901.32	(323.23)
12/18/09	08/25/09	SELL	FIDELITY ADVISOR PRIME FUND	FDAXX	10,307,640	10,307.64	10,221.51	(86.13)

# 2009 TAX and YEAR-END STATEMENT

Account Number: 214-366585  
Recipient's Identification  
Number 26-3919092

Recipient's Name and Address:  
THE GROSSMAN FAMILY FOUNDATION  
UAD 12/23/08

## TRANSACTIONS WE DO NOT REPORT TO THE IRS

## SCHEDULE OF REALIZED GAINS AND LOSSES

Disposition Date	Acquisition Date	Closing Transaction	Description	Security Identifier	Quantity	Cost Basis	Proceeds	Realized Gain/Loss
<i>Short Term (continued)</i>								
12/18/09	08/31/09	SELL	FIDELITY ADVISOR PRIME FUND	FDAXX	9 790	9 79	9 71	(0 08)
12/18/09	09/30/09	SELL	FIDELITY ADVISOR PRIME FUND	FDAXX	48 960	48 96	48 55	(0 41)
12/18/09	10/30/09	SELL	FIDELITY ADVISOR PRIME FUND	FDAXX	47 330	47 33	46 93	(0 40)
12/18/09	11/30/09	SELL	FIDELITY ADVISOR PRIME FUND	FDAXX	0 520	0 52	0 52	0 00
12/18/09	11/30/09	SELL	FIDELITY ADVISOR PRIME FUND	FDAXX	0 100	0 10	0 10	0 00
12/18/09	11/30/09	SELL	FIDELITY ADVISOR PRIME FUND	FDAXX	0 090	0 09	0 09	0 00
<b>Total Short Term</b>						<b>25,298,807.41</b>	<b>26,402,174.47</b>	<b>1,103,367.06</b>
<b>Total Short Term and Long Term</b>						<b>25,298,807.41</b>	<b>26,402,174.47</b>	<b>1,103,367.06</b>

The Schedule of Realized Gains and Losses is not reported to the IRS. This Schedule may not reflect all cost basis adjustments necessary for tax reporting purposes, for example, it does not reflect disallowed losses from wash sale events. Adjustments to cost basis may have been made for prior income received and subsequently reclassified by the issuer as a return of capital. Typically these adjustments are received after year-end and there may be differences in cost basis reflected on your monthly client brokerage statement at year end versus any subsequent reports or online displays you may have available to you. Return of capital information has been obtained from sources we believe to be reliable.

When you report your cost basis on your tax return, it should be verified with your own records. In particular, there may be other adjustments which you need to make and you should consult with your tax advisor in order to properly report your gain or loss for tax purposes. Perishing shall not be responsible for and makes no representations or warranties with respect to the accuracy of any information that you report to the IRS or other taxing authorities, and, accordingly, disclaims any and all liability that may arise with respect to your use and reliance on the information provided herein for such reporting.

Cost Basis on fixed income securities is adjusted for amortization, accretion or principal paydowns. The method of calculation is based upon the type of fixed income security and certain attributes, obtained from sources believed to be reliable. In the event, one or more of these attributes is changed, there may be a temporary incorrect adjusted cost basis reflected until the portfolio system is amended to reflect this change. These calculations will not be performed under certain circumstances, including those involving continuously callable bonds, foreign bonds, variable rates, bonds in default, index-linked bonds, bonds sold short or bonds that have a negative yield. This information is meant as a general guide and you should consult your tax advisor in the preparation of your tax returns.

There may be differences between the Schedule of Realized Gains and Losses and 1099 reporting. Below are some of the reasons for these differences:

- **Account Number Changes** - If your account number changed during the year, the Schedule of Realized Gains and Losses may have been transferred from the original account to the new account. The new account will provide you with the complete Schedule of Realized Gains and Losses. However, you will receive a complete 1099 for each account open during the year.

Account Number MW 33326 KR  
Your Financial Advisor or Contact  
RICK S. KIRKINIS  
973-360-4200/800-631-8179

Page 8 of 9 UBS Financial Services Inc.  
2009 Consolidated Form 1099

P01L071376-X1

## 2009 Realized Gain/Loss Summary

(Includes sale proceeds not reported on Form 1099-B)

This Realized Gain/Loss Summary is not a tax reporting document and has not been submitted to the IRS. If your sale amount matches the amount on Form 1099-B, which is reported to the IRS, it is marked as such. Please rely on the confirmations previously provided to you as your official activity record.

Estimated 2009 Gain/Loss for transactions with trade dates through 12/31/09 has been incorporated into this statement. Realized gain/loss is based on the sales amount less the cost basis. Please note that gain or loss recognized on the sale or redemption of certain Structured Products may be ordinary, gain or loss. Please check with your tax advisor and/or read the tax-related disclosure materials associated with those products. Note that the Original Cost Basis column is only populated for transactions of securities that have had their basis reduced due to premium amortization or increased due to OID accretion.

The cost basis of the oldest security lot (first-in, first-out or FIFO method of accounting) is assigned to a sale to calculate Gain/Loss unless you identified a specific lot (a "versus purchase" or "VSP" order) when you placed your sell order. An asterisk (\*) indicates a UBS Financial Services adjustment to cost basis. The number "1" indicates cost basis information has been provided by a source other than UBS Financial Services. Gain/Loss may not have been adjusted for all capital changes. Gain/Loss values that may be subject to Wash Sale provisions are not indicated here. "Earnings" in the Purchase Date column indicates the position sold was acquired on various dates through dividend reinvestment and that the Gain/Loss has been aggregated.

Cost basis for coupon tax-exempt municipal securities (including securities subject to AMT) has been adjusted for mandatory amortization of bond premium. The OID amount reported on your Form 1099-OID is not adjusted for Market Discount, Acquisition Premium, or Bond Premium. Therefore, the amortization and accretion adjustments used here may not be consistent with the Form 1099-OID amount because the reporting requirements are different. Gain/Loss from short sale closings are reported as short-term regardless of the holding period of property used to close the short position. Clients should consult their tax advisors as to whether exceptions may apply in their particular case to change this classification. The potential application of the "Constructive Sale" provisions (Sec 1259) for short-against-the box transactions is not considered. Clients should discuss the possible application of these provisions with their tax advisor.

	Purchase	Sale	Gains	Losses	Net Gain/Loss
Short-term Gain/Loss	\$ 149,500.52	\$ 161,523.65	\$ 13,007.07	\$ -983.94	\$ 12,023.13
<b>Sub Total:</b>	<b>\$ 149,500.52</b>	<b>\$ 161,523.65</b>	<b>\$ 13,007.07</b>	<b>\$ -983.94</b>	<b>\$ 12,023.13</b>
<b>Total:</b>	<b>\$ 149,500.52</b>	<b>\$ 161,523.65</b>	<b>\$ 13,007.07</b>	<b>\$ -983.94</b>	<b>\$ 12,023.13</b>

## Short-Term Gain/Loss

This section includes securities held for less than one year, and option contracts that are not reported on Form 1099-B.

Security Description	Activity Type	Quantity/ Face value	Original Cost Basis	Purchase date Date Acquired	Date Sold	Sale Amount	Cost or Other Basis	Gain/Loss	Remarks	Matches 1099-B
AVON PRODUCTS INC	Trade	261 000		05/27/09	06/04/09	7,009.18	6,814.19	194.99		Y
COCA COLA CO COM	Trade	101 000		05/27/09	12/08/09	5,784.12	4,718.47	1,065.65		Y
CONAGRA FOOD INC	Trade	371 000		05/27/09	07/15/09	7,046.18	6,781.69	264.49		Y
	Trade	348 000		06/19/09	07/15/09	6,809.36	6,552.67	56.69		Y
DEUTSCHE TELEKOM AG DE SPON ADR	Trade	506 000		05/27/09	07/16/09	5,817.53	5,682.33	135.20		Y
ENI SPA IT SPON ADR	Trade	407 000		05/27/09	08/04/09	18,979.87	19,209.79	-229.92		Y
	Trade	382 000		06/19/09	08/04/09	17,814.04	18,568.06	-754.02		Y

Continued on page 9

2009 1099 / MW 33326 KR

Account Number MW 33326 KR  
 Your Financial Advisor or Contact  
 RICK S KIRKINIS  
 973-360-4200/800-631-8179

Page 9 of 9

**UBS Financial Services Inc.**  
**2009 Consolidated Form 1099**

P01L071377-X1

**Short-Term Gain/Loss - continued**

*This section includes securities held for less than one year, and option contracts that are not reported on Form 1099-B.*

Security Description	Activity Type	Quantity/ Face value	Original Cost Basis	Purchase date Date Acquired	Date Sold	Sale Amount	Cost or Other Basis	Gain/Loss	Remarks	Matches 1099-B
KRAFT FOODS INC CL A	Trade	820 000		05/27/09	10/09/09	21,266 64	20,918 20	348 44		Y
	Trade	771 000		06/19/09	10/09/09	19,995 83	19,776 15	219 68		Y
MERCK & CO INC NEW COM	Trade	198 000		05/27/09	12/08/09	7,260 94	5,272 30	1,988 64		Y
	Trade	117 000		06/04/09	12/08/09	4,290 56	3,132 19	1,158 37		Y
PROCTER & GAMBLE CO	Trade	93 000		05/27/09	12/08/09	5,761 47	4,860 91	900 56		Y
UNILEVER PLC AMER SHS NEW SPON ADR	Trade	733 000		05/27/09	10/16/09	21,760 52	17,357 07	4,403 45		Y
3M CO	Trade	159 000		07/15/09	10/19/09	12,127 41	9,856 50	2,270 91		Y
<b>Total Short-Term Gain/Loss</b>						<b>161,523 65</b>	<b>149,500 52</b>	<b>12,023 13</b>		

## 2009 Realized Gain/Loss Summary

(Includes sale proceeds not reported on Form 1099-B)

This Realized Gain/Loss Summary is not a tax reporting document and has not been submitted to the IRS. If your sale amount matches the amount on Form 1099-B, which is reported to the IRS, it is marked as such. Please rely on the confirmations previously provided to you as your official activity record.

Estimated 2009 Gain/Loss for transactions with trade dates through 12/31/09 has been incorporated into this statement. Realized gain/loss is based on the sales amount less the cost basis. Please note that gain or loss recognized on the sale or redemption of certain Structured Products may be ordinary, and not capital, gain or loss. Please check with your tax advisor and/or read the tax-related disclosure materials associated with those products. Note that the Original Cost Basis column is only populated for transactions of securities that have had their basis reduced due to premium amortization or increased due to OID accretion.

The cost basis of the oldest security lot (first-in, first-out or FIFO method of accounting) is assigned to a sale to calculate Gain/Loss unless you identified a specific lot (a "versus purchase" or "VSP" order) when you placed your sell order. An asterisk (\*) indicates a UBS Financial Services adjustment to cost basis. The number "1" indicates cost basis information has been provided by a source other than UBS Financial Services. Gain/Loss may not have been adjusted for all capital changes. Gain/Loss values that may be subject to Wash Sale provisions are not indicated here. "Earnings" in the Purchase Date column indicates the position sold was acquired on various dates through dividend reinvestment and that the Gain/Loss has been aggregated.

Cost basis for coupon tax-exempt municipal securities (including securities subject to AMT) has been adjusted for mandatory amortization of bond premium. The OID amount reported on your Form 1099-OID is not adjusted for Market Discount, Acquisition Premium, or Bond Premium. Therefore, the amortization and accretion adjustments used here may not be consistent with the Form 1099-OID amount because the reporting requirements are different. Gain/Loss from short sale closings are reported as short-term regardless of the holding period of property used to close the short position. Clients should consult their tax advisors as to whether exceptions may apply in their particular case to change this classification. The potential application of the "Constructive Sale" provisions (Sec 1259) for short-against-the box transactions is not considered. Clients should discuss the possible application of these provisions with their tax advisor.

	Purchase	Sale	Gains	Losses	Net Gain/Loss
Short-term Gain/Loss	\$ 101,609.62	\$ 106,990.58	\$ 7,196.11	\$ -1,815.15	\$ 5,380.96
Sub Total:	\$ 101,609.62	\$ 106,990.58	\$ 7,196.11	\$ -1,815.15	\$ 5,380.96
Total:	\$ 101,609.62	\$ 106,990.58	\$ 7,196.11	\$ -1,815.15	\$ 5,380.96

## Short-Term Gain/Loss

This section includes securities held for less than one year, and option contracts that are not reported on Form 1099-B

Security Description	Quantity/ Face value	Activity Type	Original Cost Basis	Purchase date Date Acquired	Date Sold	Sale Amount	Cost or Other Basis	Gain/Loss	Remarks	Matches 1099-B
AAG HOLDING COMPANY INC 7.2500% DUE 01/23/34 CALLABLE	200 000	Trade		06/03/09	10/09/09	4,355.88	3,502.00	853.88		Y
BANK OF AMERICA CORP 6.50% DUE 10/15/2032 CALLABLE	18 000	Trade		06/12/09	12/31/09	428.38	353.70	74.68		Y
BEAR STEARNS CAPITAL TR 7.800% DUE 05/15/31 CALLABLE	700 000	Redemption		05/21/09	11/30/09	17,500.00	16,324.00	1,176.00		Y

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**Short-Term Gain/Loss - continued**

*This section includes securities held for less than one year, and option contracts that are not reported on Form 1099-B*

Security Description	Activity Type	Quantity/ Face value	Original Cost Basis	Purchase date Date Acquired	Date Sold	Sale Amount	Cost or Other Basis	Gain/Loss	Remarks	Matches 1099-B
EQUITY RESIDENTIAL PPTYS SER N 6 48% PREFERRED CLBL	Trade	750 000		06/18/09	09/24/09	15,412 10	14,340 00	1,072 10		Y
HSBC HLDGS PLC SER A 6 200% PREFERRED CLBL PAR VALUE - 25 00 USD	Trade	700 000		05/18/09	08/04/09	14,349 63	12,915 00	1,434 63		Y
ING GROEP N V 6.375% PREFERRED CLBL PAR VALUE - 25 00 USD	Trade	1,400 000		05/27/09	09/10/09	18,563 52	20,378 67	-1,815 15		Y
PRUDENTIAL PLC CALL 9/23/10@25 00 6 50% PREFERRED CLBL	Trade	500 000		09/23/09	10/15/09	12,174 68	11,300 00	874 68		Y
PUBLIC STORAGE SER C 6 600% PREFERRED REITS CALL 09/13/09@\$25 00	Trade Trade	600 000 18 000		05/21/09 05/21/09	08/24/09 10/19/09	13,169 66 390 76	12,000 00 360 00	1,169 66 30 76		Y Y
REPSOL INTL CAPITAL LTD SER A 7 450% PREFERRED CLBL 06/08/07@\$25 00	Trade	425 000		07/15/09	10/05/09	10,645 97	10,136 25	509 72		Y
<b>Total Short-Term Gain/Loss</b>						<b>106,990.58</b>	<b>101,609.62</b>	<b>5,380.96</b>		

2009 1099 / MW 33328 KR

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

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SOURCE	AMOUNT
ABBEY CAPITAL MULTI-MANAGER FUND, LTD.	647.
CITIBANK #9952996897	81.
CREDIT SUISSE #214-366585	96,968.
GOLDMAN SACHS #028-05905-3	232,183.
UBS #MW 27690 KR	48.
UBS #MW 27690 KR	52,746.
<del>UBS #MW 33325 KR</del>	<del>46.</del>
UBS #MW 33326 KR	5.
UBS #MW 34527 KR	43.
UBS PAULSON ADVANTAGE, LLC	13,308.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	396,075.

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FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
CREDIT SUISSE #214-366585	1,792,293.	0.	1,792,293.
CREDIT SUISSE #214-366585	54,288.	0.	54,288.
CREDIT SUISSE #214-366585 -			
ACCRUED INTEREST	-52,240.	0.	-52,240.
GOLDMAN SACHS #028-05905-3	1,019,984.	0.	1,019,984.
SMITH BARNEY #630-57575-17	55,310.	0.	55,310.
UBS #MW 27690 KR	69,958.	0.	69,958.
UBS #MW 30304 KR	81,266.	0.	81,266.
UBS #MW 30305 KR	129,844.	0.	129,844.
UBS #MW 30306 KR	86,101.	0.	86,101.
UBS #MW 32920 KR	255,183.	0.	255,183.
UBS #MW 33325 KR	86.	0.	86.
UBS #MW 33326 KR	26,432.	110.	26,322.
UBS #MW 33327 KR	158,182.	0.	158,182.
UBS #MW 33328 KR	20,722.	491.	20,231.
UBS #MW 33328 KR	37,033.	0.	37,033.
UBS #MW 33446 KR	61,988.	0.	61,988.
UBS #MW 35001 KR	41,661.	0.	41,661.
UBS #MW 35002 KR	36,816.	44.	36,772.
UBS PAULSON ADVANTAGE, LLC	2,039.	0.	2,039.
TOTAL TO FM 990-PF, PART I, LN 4	3,876,946.	645.	3,876,301.

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FORM 990-PF	OTHER INCOME	STATEMENT	3
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ABBEEY CAPITAL MULTI-MANAGER FUND, LTD.	4,909.	4,909.	
UBS PAULSON ADVANTAGE, LLC	2,782.	2,782.	
UBS #33326 - NONDIVIDEND DISTRIBUTION	29.	0.	
UBS PAULSON ADVANTAGE, LLC	-13,226.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	-5,506.	7,691.	

FORM 990-PF	LEGAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	11,192.	0.		11,192.
TO FM 990-PF, PG 1, LN 16A	11,192.	0.		11,192.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
WTAS FEES	5,000.	2,500.		2,500.
TO FORM 990-PF, PG 1, LN 16B	5,000.	2,500.		2,500.



FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
UBS #MW 32920 KR- MANAGED ACCOUNT FEE	6,785.	5,089.		1,696.	
UBS #MW 33326 KR- MANAGED ACCOUNT FEE	5,983.	4,487.		1,496.	
UBS #MW 33326 KR- ADR FEES	4.	4.		0.	
UBS #MW 33328 KR- MANAGED ACCOUNT FEE	5,944.	4,458.		1,486.	
TO FORM 990-PF, PG 1, LN 16C	18,716.	14,038.		4,678.	

FORM 990-PF	TAXES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
UBS #MW 33326 KR- FOREIGN TAXES PAID	707.	707.		0.	
FEDERAL ESTIMATED PAYMENTS	15,000.	15,000.		0.	
2008 FEDERAL BALANCE DUE	152.	152.		0.	
UBS PAULSON ADVANTAGE, LLC- FOREIGN TAXES PAID	102.	102.		0.	
TO FORM 990-PF, PG 1, LN 18	15,961.	15,961.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ADMIN FEES RELATED TO SCHOLARSHIP PROGRAM GRANT	1,228.	0.		1,228.	
BANK CHARGES	25.	0.		0.	
SUBSCRIPTIONS	900.	0.		0.	
ABBEY CAPITAL MULTI-MANAGER FUND, LTD.	15,396.	11,547.		3,849.	
UBS PAULSON ADVANTAGE, LLC	12,667.	9,500.		3,167.	
TO FORM 990-PF, PG 1, LN 23	30,216.	21,047.		8,244.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK - SEE ATTACHED	7,049,756.	8,062,798.
TOTAL TO FORM 990-PF, PART II, LINE 10B	7,049,756.	8,062,798.

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS - SEE ATTACHED	121,080,125.	127,529,574.
TOTAL TO FORM 990-PF, PART II, LINE 10C	121,080,125.	127,529,574.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OTHER INVESTMENTS - SEE ATTACHED	COST	5,992,895.	5,992,474.
TOTAL TO FORM 990-PF, PART II, LINE 13		5,992,895.	5,992,474.

**THE GROSSMAN FAMILY FOUNDATION**  
**EIN 26-3919092**  
**STATEMENT OF BALANCE SHEET ASSETS**

		Beginning of Year Book Value	End of Year Book Value	End of Year Fair Market Value
<b>Investments- Corporate Stock</b>				
UBS Select Prime Institutional Fund	UBS #33325	\$ -	\$ 86	\$ 86
Pennymac Mtg Invt Tr Com	CS	\$ -	\$ 400,005	\$ 343,600
Invesco Mortgage Capital Inc Com	CS	\$ -	\$ 600,000	\$ 682,800
UBS Select Prime Institutional Fund	UBS #27690	\$ -	\$ 335	\$ 335
Blackrock Global Allocation Fund Inc A	UBS #33446	\$ -	\$ 2,549,851	\$ 2,916,425
Ivy Asset Strategy Fund Class A	UBS #33446	\$ -	\$ 2,512,147	\$ 2,965,576
AGL Resources Inc	UBS #33326	\$ -	\$ 11,749	\$ 14,223
Altra Group Inc	UBS #33326	\$ -	\$ 20,514	\$ 24,341
AT&T Inc	UBS #33326	\$ -	\$ 42,011	\$ 47,679
BCE Inc New	UBS #33326	\$ -	\$ 21,255	\$ 27,251
BP PLC Spon ADR	UBS #33326	\$ -	\$ 38,705	\$ 46,086
Bristol Myers Squibb Co	UBS #33326	\$ -	\$ 39,469	\$ 49,591
Centurytel Inc	UBS #33326	\$ -	\$ 11,902	\$ 14,049
Chevron Corp	UBS #33326	\$ -	\$ 35,847	\$ 40,266
Coca Cola Co Com	UBS #33326	\$ -	\$ 27,971	\$ 33,117
Conocophillips	UBS #33326	\$ -	\$ 17,281	\$ 20,019
Deutsch Telekom AG DE Spon ADR	UBS #33326	\$ -	\$ 25,145	\$ 32,164
Diageo PLC New GB Spon ADR	UBS #33326	\$ -	\$ 22,486	\$ 27,833
Dominion Resources Inc VA	UBS #33326	\$ -	\$ 32,932	\$ 38,959
Duke Energy Holding Corp New	UBS #33326	\$ -	\$ 30,314	\$ 36,915
France Telecom SA Spon ADR	UBS #33326	\$ -	\$ 19,627	\$ 21,378
Glaxo Smithkline PLC ADR	UBS #33326	\$ -	\$ 35,118	\$ 42,081
HCP Inc	UBS #33326	\$ -	\$ 10,901	\$ 10,781
Health Care Reit Inc SBI	UBS #33326	\$ -	\$ 11,024	\$ 10,725
Heinz H J Co	UBS #33326	\$ -	\$ 41,335	\$ 48,276
Johnson & Johnson Com	UBS #33326	\$ -	\$ 32,555	\$ 37,873
Kimberly Clark Corp	UBS #33326	\$ -	\$ 40,261	\$ 50,012
Lilly Eli & Co	UBS #33326	\$ -	\$ 39,432	\$ 41,602
Lorillard Inc	UBS #33326	\$ -	\$ 10,823	\$ 11,152
McDonalds Corp	UBS #33326	\$ -	\$ 39,196	\$ 43,084
Merck & Co Inc New Com	UBS #33326	\$ -	\$ 8,398	\$ 11,656
Philip Morris Intl Inc	UBS #33326	\$ -	\$ 29,476	\$ 33,781
Procter & Gamble Co	UBS #33326	\$ -	\$ 18,094	\$ 21,342
Progress Energy Inc	UBS #33326	\$ -	\$ 23,514	\$ 26,780
Reynolds Amern Inc (Holding Co)	UBS #33326	\$ -	\$ 20,006	\$ 27,438
Royal Dutch Shell Plc Ads Repstg 2 Cl B Ord SHS Spon ADR	UBS #33326	\$ -	\$ 35,042	\$ 38,540
Scana Corp New	UBS #33326	\$ -	\$ 9,928	\$ 12,246
Southern Co	UBS #33326	\$ -	\$ 38,632	\$ 43,516
Telefonica S A Spon ADR	UBS #33326	\$ -	\$ 17,320	\$ 17,038
Total S A France Spon ADR	UBS #33326	\$ -	\$ 30,843	\$ 35,990
Unilever Plc Amer SHS New Spon ADR	UBS #33326	\$ -	\$ 17,528	\$ 22,745
Venzon Communications Inc	UBS #33326	\$ -	\$ 42,700	\$ 46,879
Vodafone Group Plc New Spon ADR	UBS #33326	\$ -	\$ 28,396	\$ 33,919
Windstream Corp	UBS #33326	\$ -	\$ 9,602	\$ 12,649
<b>Total Investments- Corporate Stock</b>		<b>\$ -</b>	<b>\$ 7,049,756</b>	<b>\$ 8,062,798</b>

**Investments- Corporate Bonds**

Wells Fargo Advantage Ultra Short Term Muni Income Fund Class A	UBS #27690	\$ -	\$ 1,483,136	\$ 1,486,220
Delaware Extended Duration Bond Fund Class A	UBS #30304	\$ -	\$ 2,081,272	\$ 2,444,619
Hartford Floating Rate Fund Class A	UBS #30305	\$ -	\$ 5,105,392	\$ 5,474,971
Loomis Sayles Strategic Income Fund Class A	UBS #30306	\$ -	\$ 2,086,108	\$ 2,450,585
TCW Total Return Bond Fund	UBS #32920	\$ -	\$ 5,184,896	\$ 5,238,781
Ivy High Income Fund Class A	UBS #33327	\$ -	\$ 2,139,407	\$ 2,367,900
Goldman Sachs Core Fixed-Inc I Mutual Fund Class I	GS	\$ -	\$ 13,449,919	\$ 13,748,675
Goldman Sachs Enhanced Income Instl Shares	GS	\$ -	\$ 10,067,440	\$ 10,088,184
Goldman Sachs Investment Grade Credit Fund - Inst	GS	\$ -	\$ 13,595,030	\$ 14,192,182
Goldman Sachs High Yield Instl Mutual Fund Class I	GS	\$ -	\$ 13,807,595	\$ 15,103,612
Blackrock High Yield Bond Fund	CS	\$ -	\$ 5,497,934	\$ 7,274,712
Dryden Short Term Corporate Bond Fund	CS	\$ -	\$ 10,121,023	\$ 10,237,330
Lord Abbett Short Duration	CS	\$ -	\$ 20,506,407	\$ 20,617,927
Principal High Yield II Fund	CS	\$ -	\$ 5,499,509	\$ 6,268,506
AAG Holding Company Inc	UBS #33328	\$ -	\$ 17,060	\$ 22,500

AAG Holding Company Inc	UBS #33328	\$	-	\$	30,106	\$	32,437
Aegon N V	UBS #33328	\$	-	\$	41,518	\$	47,835
Allianz SE	UBS #33328	\$	-	\$	49,580	\$	54,175
Ameriprise Finl Inc	UBS #33328	\$	-	\$	21,455	\$	21,998
Arch Capital Call	UBS #33328	\$	-	\$	38,688	\$	43,712
Aspen Insurance Holdings Ltd	UBS #33328	\$	-	\$	21,560	\$	24,309
Bank of America Corp	UBS #33328	\$	-	\$	21,356	\$	21,119
Bank of America Corp	UBS #33328	\$	-	\$	26,528	\$	31,901
Bank One Capital TR VI	UBS #33328	\$	-	\$	45,359	\$	47,747
BB&T Capital Trust V	UBS #33328	\$	-	\$	25,400	\$	26,860
BB&T Capital Trust	UBS #33328	\$	-	\$	27,240	\$	28,415
BNY Capital IV	UBS #33328	\$	-	\$	20,160	\$	20,800
BNY Capital V	UBS #33328	\$	-	\$	20,046	\$	22,410
Comcast Corp	UBS #33328	\$	-	\$	70,356	\$	76,167
Credit Suisse	UBS #33328	\$	-	\$	40,560	\$	43,656
Dominion Resources Inc	UBS #33328	\$	-	\$	61,528	\$	65,075
Endurance Specialty Hldg Call	UBS #33328	\$	-	\$	35,935	\$	42,291
Entergy Texas Inc	UBS #33328	\$	-	\$	41,756	\$	43,392
Equity Residential Pptys Ser N	UBS #33328	\$	-	\$	19,998	\$	22,700
Everest Re Cap Tr II	UBS #33328	\$	-	\$	21,341	\$	20,458
FPC Capital I	UBS #33328	\$	-	\$	63,057	\$	65,484
FPL Group Cptl Inc	UBS #33328	\$	-	\$	30,976	\$	32,245
General Elec Cap Corp	UBS #33328	\$	-	\$	60,436	\$	63,920
HSBC Finance Corp	UBS #33328	\$	-	\$	55,596	\$	60,003
HSBC Holdgs Plc Ser A	UBS #33328	\$	-	\$	5,535	\$	6,417
JP Morgan Chase Cap XI	UBS #33328	\$	-	\$	17,065	\$	17,306
Kimco Realty Corp	UBS #33328	\$	-	\$	51,363	\$	59,978
M&T Capital Trust IV	UBS #33328	\$	-	\$	61,774	\$	64,852
Markel Corp	UBS #33328	\$	-	\$	18,992	\$	18,669
Metlife Inc Series B	UBS #33328	\$	-	\$	43,759	\$	48,620
Morgan Stanley Cap TR VIII	UBS #33328	\$	-	\$	56,760	\$	63,278
Natl City Cap Trust III	UBS #33328	\$	-	\$	48,780	\$	55,463
PPL Cap Funding	UBS #33328	\$	-	\$	19,580	\$	20,472
Protective Lifecorp	UBS #33328	\$	-	\$	21,679	\$	22,207
Prudential Finl Inc	UBS #33328	\$	-	\$	29,898	\$	31,860
PS Business Pks Inc Calif Ser I	UBS #33328	\$	-	\$	20,498	\$	21,370
PS Business Pks Inc Calif Ser M	UBS #33328	\$	-	\$	10,376	\$	11,915
Public Storage Rerp Dep	UBS #33328	\$	-	\$	69,841	\$	76,932
Realty Income Corp	UBS #33328	\$	-	\$	19,042	\$	21,253
Renaissancere Holdings Ltd Ser C	UBS #33328	\$	-	\$	23,428	\$	22,995
Renaissancere Holdings Ltd Ser D	UBS #33328	\$	-	\$	19,440	\$	21,000
Santander Finance Pref SA Unr Ser 10	UBS #33328	\$	-	\$	27,510	\$	28,380
Saturns GS 2003-06	UBS #33328	\$	-	\$	46,532	\$	52,744
Scana Corp New	UBS #33328	\$	-	\$	26,875	\$	28,380
Sovereign Capital Tr V	UBS #33328	\$	-	\$	30,780	\$	37,500
Telephone & Data	UBS #33328	\$	-	\$	33,995	\$	46,520
Telephone & Data Systems Inc	UBS #33328	\$	-	\$	32,710	\$	34,384
USB Capital VI	UBS #33328	\$	-	\$	61,116	\$	64,200
ViaCom Inc New	UBS #33328	\$	-	\$	37,503	\$	43,709
VNB Capital Trust I	UBS #33328	\$	-	\$	42,428	\$	42,815
Vornado Realty L P	UBS #33328	\$	-	\$	21,603	\$	21,167
W R Berkley Cap Trust II	UBS #33328	\$	-	\$	21,316	\$	21,632
Wachovia Cap Trust	UBS #33328	\$	-	\$	34,278	\$	35,656
Weingarten Realty Invest	UBS #33328	\$	-	\$	20,429	\$	21,950
Wells Fargo & Co New 8 00% Preferred Cbl	UBS #33328	\$	-	\$	25,428	\$	30,840
Xcel Energy Inc	UBS #33328	\$	-	\$	73,356	\$	74,340
Fidelity Advisor Mortgage Securities Fund CI A	UBS #35002	\$	-	\$	4,445,779	\$	4,374,613
Lord Abbett Short Duration Income Fund Class A	UBS #35001	\$	-	\$	4,028,019	\$	4,010,349
<b>Total Investments- Corporate Bonds</b>		<b>\$</b>	<b>-</b>	<b>\$</b>	<b>121,080,125</b>	<b>\$</b>	<b>127,529,574</b>

#### Investments- Other

Abbey Capital Multi-Manager Fund Ltd	UBS #33325	\$	-	\$	1,005,028	\$	997,346
UBS Paulson Advantage LLC	UBS #34527	\$	-	\$	4,987,867	\$	4,995,128
<b>Total Investments- Other</b>		<b>\$</b>	<b>-</b>	<b>\$</b>	<b>5,992,895</b>	<b>\$</b>	<b>5,992,474</b>

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

OMB No. 1545-1709

► File a separate application for each return

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ► ☒
  - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).
- Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**

## **Part I** Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ► ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits

Type or print  File by the due date for filing your return. See instructions.	Name of Exempt Organization	Employer identification number
	THE GROSSMAN FAMILY FOUNDATION	26-3919092
	Number, street, and room or suite no. If a P.O. box, see instructions. C/O WTAS LLC, 1700 EAST PUTNAM AVENUE, NO. 206	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. OLD GREENWICH, CT 06870	

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

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

- STEVEN GROSSMAN - C/O WTAS LLC, 1700 EAST PUTNAM AVENUE,  
SUITE 206 - OLD GREENWICH, CT 06870
- The books are in the care of ► Telephone No. ► 631-231-0400 FAX No. ► ☐
- If the organization does not have an office or place of business in the United States, check this box ► ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ► ☐. If it is for part of the group, check this box ► ☐ and attach a list with the names and EINs of all members the extension will cover.

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for: ► ☒ calendar year 2009 or ► ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

- 2 If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$ 75,000.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$ 15,000.
c <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$ 60,000.

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

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

Form **8868** (Rev. 4-2009)