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

2009

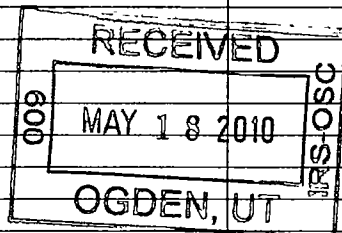
Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year **2009**, or tax year beginning **2009**, and ending **20**

G Check all that apply: Initial return Initial return of a former public charity Final return
 Amended return Address change Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation HERBERT GOLDSTEN TRUST 58017730		A Employer identification number 36-3412270
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions) (402) 963-2153
	8712 WEST DODGE ROAD #300 City or town, state, and ZIP code OMAHA, NE 68114		C If exemption application is pending, check here <input type="checkbox"/> D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 2,254,608.		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	

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) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule). Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B.				
	2 Interest on savings and temporary cash investments	219.	219.		STMT 1
	4 Dividends and interest from securities	64,569.	64,569.		STMT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-62,861.			
	b Gross sales price for all assets on line 6a	682,795.			
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10 a Gross sales less returns and allowances				
	b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	1,824.	828.		STMT 5	
12 Total Add lines 1 through 11	3,751.	65,616.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages		NONE	NONE	
	15 Pension plans, employee benefits		NONE	NONE	
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 6	1,000.	500.	NONE	500.
	c Other professional fees (attach schedule) STMT 7	14,192.	11,354.		2,838.
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) STMT 8	342.	342.		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings			NONE	NONE
	22 Printing and publications			NONE	NONE
	23 Other expenses (attach schedule) STMT 9	20.			20.
	24 Total operating and administrative expenses Add lines 13 through 23	15,554.	12,196.	NONE	3,358.
	25 Contributions, gifts, grants paid	109,392.			109,392.
26 Total expenses and disbursements Add lines 24 and 25	124,946.	12,196.	NONE	112,750.	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-121,195.				
b Net investment income (if negative, enter -0-)		53,420.			
c Adjusted net income (if negative, enter -0-)					



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments	52,381.	37,670.	37,670.	
	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 (attach schedule) (see page 16 of the instructions)				
	7	Other notes and loans receivable (attach schedule)				
		Less: allowance for doubtful accounts	NONE			
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10 a	Investments - U.S. and state government obligations (attach schedule)	200,025.	200,025.	211,063.	
	b	Investments - corporate stock (attach schedule)	1,288,011.	1,337,493.	1,436,936.	
	c	Investments - corporate bonds (attach schedule)	700,957.	545,014.	568,889.	
	11	Investments - land, buildings, and equipment basis				
	Less: accumulated depreciation (attach schedule)					
12	Investments - mortgage loans					
13	Investments - other (attach schedule)					
14	Land, buildings, and equipment basis					
	Less: accumulated depreciation (attach schedule)					
15	Other assets (describe)	STMT 15) 75.	50.	50.		
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	2,241,449.	2,120,252.	2,254,608.		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe)				
	23	Total liabilities (add lines 17 through 22)				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>					
	27	Capital stock, trust principal, or current funds	2,241,449.	2,120,252.		
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances (see page 17 of the instructions)	2,241,449.	2,120,252.			
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,241,449.	2,120,252.			

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	2,241,449.
2	Enter amount from Part I, line 27a	2	-121,195.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	2,120,254.
5	Decreases not included in line 2 (itemize) SEE STATEMENT 16	5	2.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,120,252.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co)		(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)	
1a SEE PART IV DETAIL					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))		
(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			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)		{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	-62,861.
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) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8.		{ }		3	

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 page 18 of the 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	118,746.	2,231,141.	0.05322209578
2007	118,461.	2,468,974.	0.04797984912
2006	109,404.	2,389,516.	0.04578500416
2005	112,726.	2,329,315.	0.04839448507
2004	80,397.	2,286,199.	0.03516623006
2 Total of line 1, column (d)			2 0.23054766419
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 0.04610953284
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 2,015,257.
5 Multiply line 4 by line 3			5 92,923.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 534.
7 Add lines 5 and 6			7 93,457.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18			8 112,750.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the instructions)

Table with 11 rows and 2 columns. Row 1: Exempt operating foundations... 534. Row 2: Tax under section 511... 2. Row 3: Add lines 1 and 2... 534. Row 4: Subtitle A (income) tax... NONE. Row 5: Tax based on investment income... 534. Row 6: Credits/Payments... 732. Row 7: Total credits and payments... 732. Row 8: Enter any penalty... 8. Row 9: Tax due... 9. Row 10: Overpayment... 198. Row 11: Enter the amount of line 10 to be Credited to 2010 estimated tax... 198. Refunded.

Part VII-A Statements Regarding Activities

Table with 10 rows and 3 columns (Yes, No). Row 1a: During the tax year, did the foundation attempt to influence any national, state, or local legislation... No (X). Row 1b: Did it spend more than \$100 during the year... No (X). Row 1c: Did the foundation file Form 1120-POL for this year? No (X). Row 2: Has the foundation engaged in any activities that have not previously been reported to the IRS? No (X). Row 3: Has the foundation made any changes, not previously reported to the IRS... No (X). Row 4a: Did the foundation have unrelated business gross income of \$1,000 or more during the year? No (X). Row 4b: If "Yes," has it filed a tax return on Form 990-T for this year? No. Row 5: Was there a liquidation, termination, dissolution, or substantial contraction during the year? No (X). Row 6: Are the requirements of section 508(e) satisfied either... Yes (X). Row 7: Did the foundation have at least \$5,000 in assets at any time during the year? Yes (X). Row 8a: Enter the states to which the foundation reports... STMT 17. Row 8b: If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General... Yes (X). Row 9: Is the foundation claiming status as a private operating foundation... No (X). Row 10: Did any persons become substantial contributors during the tax year? No (X).

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 page 20 of the instructions)			X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <input type="checkbox"/> N/A		X	
14	The books are in care of <input type="checkbox"/> U S BANK NATIONAL ASSOCIATION Telephone no <input type="checkbox"/> (402) 963-2153 Located at <input type="checkbox"/> 525 N 132ND ST, OMAHA, NE ZIP + 4 <input type="checkbox"/> 68154			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <input type="checkbox"/> 15			

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 <input type="checkbox"/>	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <input type="checkbox"/>		
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 page 20 of the instructions)	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. <input type="checkbox"/>		
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)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? Yes No

(3) Provide a grant to an individual for travel, study, or other similar purposes? Yes No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) 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 page 22 of the instructions)? Yes No
 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? 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? Yes No
 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? Yes No

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 (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 18		-0-	-0-	-0-

2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the instructions). 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		NONE	NONE	NONE

Total number of other employees paid over \$50,000 NONE

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		NONE

Total number of others receiving over \$50,000 for professional services **NONE**

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions	
3 NONE	
Total. Add lines 1 through 3	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	1,976,806.
b	Average of monthly cash balances	1b	69,140.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	NONE
d	Total (add lines 1a, b, and c)	1d	2,045,946.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	2,045,946.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	30,689.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,015,257.
6	Minimum investment return. Enter 5% of line 5	6	100,763.

Part XI Distributable Amount (see page 25 of the 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	100,763.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	534.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	534.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	100,229.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	100,229.
6	Deduction from distributable amount (see page 25 of the instructions)	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	100,229.

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	112,750.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	112,750.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	534.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	112,216.

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 page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				100,229.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			106,958.	
b Total for prior years 20____, 20____, 20____		NONE		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	NONE			
b From 2005	NONE			
c From 2006	NONE			
d From 2007	NONE			
e From 2008	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$ <u>112,750.</u>				
a Applied to 2008, but not more than line 2a			106,958.	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)		NONE		
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)	NONE			
d Applied to 2009 distributable amount				5,792.
e Remaining amount distributed out of corpus	NONE			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e Subtract line 5	NONE			
b Prior years' undistributed income. Subtract line 4b from line 2b		NONE		
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		NONE		
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions		NONE		
e Undistributed income for 2008 Subtract line 4a from line 2a. Taxable amount - see page 27 of the instructions				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010.				94,437.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	NONE			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	NONE			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	NONE			
10 Analysis of line 9:				
a Excess from 2005	NONE			
b Excess from 2006	NONE			
c Excess from 2007	NONE			
d Excess from 2008	NONE			
e Excess from 2009	NONE			

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling
b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

Table with 5 columns: (a) 2009, (b) 2008, (c) 2007, (d) 2006, (e) Total. Rows include 2a-e (Qualifying distributions) and 3a-c (Alternative tests).

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 28 of the instructions.)

1 Information Regarding Foundation Managers:
a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)
N/A

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

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:
Check here [X] if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

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

c Any submission deadlines

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

Part 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
<p>a Paid during the year</p> <p>SEE STATEMENT 22</p>				
Total ▶ 3a				109,392.
b Approved for future payment				
Total ▶ 3b				

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
29,881.00		900. AFLAC INC PROPERTY TYPE: SECURITIES 11,186.00					03/10/2009	05/12/2009
							18,695.00	
8,000.00		1322.314 AMER CENT NEW OPPORTU II CL INV PROPERTY TYPE: SECURITIES 12,271.00					10/30/2007	12/07/2009
							-4,271.00	
25,935.00		300. APOLLO GROUP INC CL A PROPERTY TYPE: SECURITIES 22,450.00					11/26/2008	01/20/2009
							3,485.00	
2,600.00		350. BANK OF AMERICA CORP PROPERTY TYPE: SECURITIES 11,922.00					09/08/2008	01/16/2009
							-9,322.00	
2,600.00		350. BANK OF AMERICA CORP PROPERTY TYPE: SECURITIES 13,591.00					08/26/2003	01/16/2009
							-10,991.00	
100,000.00		100000. CHASE MAN CORP NEW PROPERTY TYPE: SECURITIES 99,028.00		7.125%	6/1		08/13/1999	06/15/2009
							972.00	
84,250.00		100000. CITI GROUP INC PROPERTY TYPE: SECURITIES 99,437.00		7.250%	10/0		11/20/2000	02/23/2009
							-15,187.00	
9,940.00		700. COMCAST CORP CL A PROPERTY TYPE: SECURITIES 18,760.00					05/01/2007	11/05/2009
							-8,820.00	
50,000.00		50000. DUKE ENERGY CORP PROPERTY TYPE: SECURITIES 50,223.00		5.375%	1/01		08/21/2002	01/01/2009
							-223.00	
50,000.00		5353.319 FIRST AMER INFLATION PRO SEC CL PROPERTY TYPE: SECURITIES 47,537.00					03/10/2009	04/03/2009
							2,463.00	
10,000.00		1078.749 FIRST AMER INFLATION PRO SEC CL PROPERTY TYPE: SECURITIES 9,579.00					03/10/2009	05/04/2009
							421.00	

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
5,000.00		500.501 FIRST AMER INFLATION PRO SEC CL PROPERTY TYPE: SECURITIES 4,444.00					03/10/2009	10/26/2009
11,687.00		400. HEWLETT PACKARD CO PROPERTY TYPE: SECURITIES 10,436.00					08/17/2005	02/24/2009
8,733.00		300. MCGRAW HILL COMPANIES INC PROPERTY TYPE: SECURITIES 13,113.00					09/11/2008	04/27/2009
8,733.00		300. MCGRAW HILL COMPANIES INC PROPERTY TYPE: SECURITIES 9,411.00					08/09/2002	04/27/2009
67,788.00		75000. MERRILL LYNCH CO PROPERTY TYPE: SECURITIES 76,295.00		5.770%	7/25		10/17/2006	03/05/2009
16,610.00		850. MICROSOFT CORP PROPERTY TYPE: SECURITIES 20,532.00					09/13/2005	04/13/2009
15,190.00		200. MONSANTO CO PROPERTY TYPE: SECURITIES 16,422.00					04/02/2009	06/29/2009
40,000.00		2587.322 LAUDUS INTL MRKTMASERS INV FUN PROPERTY TYPE: SECURITIES 61,087.00					05/31/2007	10/27/2009
12,000.00		744.879 LAUDUS INTL MRKTMASERS INV FUND PROPERTY TYPE: SECURITIES 17,590.00					05/31/2007	12/07/2009
12,122.00		300. STANLEY WKS PROPERTY TYPE: SECURITIES 14,934.00					05/06/2008	09/08/2009
30,817.00		1700. TD AMERITRADE HLDG CORP PROPERTY TYPE: SECURITIES 28,823.00					01/24/2008	12/18/2009

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
34,959.00		700. WAL MART STORES INC PROPERTY TYPE: SECURITIES 31,939.00				06/05/2006	05/05/2009	
						3,020.00		
17,956.00		400. WYETH PROPERTY TYPE: SECURITIES 14,389.00				09/29/1997	06/18/2009	
						3,567.00		
18,663.00		1000. WEATHERFORD INTERNATIONAL LTD PROPERTY TYPE: SECURITIES 11,558.00				01/02/2009	08/17/2009	
						7,105.00		
9,331.00		500. WEATHERFORD INTERNATIONAL LTD PROPERTY TYPE: SECURITIES 18,699.00				04/03/2008	08/17/2009	
						-9,368.00		
TOTAL GAIN(LOSS)						----- -62,861. =====		

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
INTEREST ON SAVINGS AND TEMPORARY CASH	219.	219.
TOTAL	219.	219.
	=====	=====

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES
 =====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
AFLAC INC	756.	756.
ABBOTT LABORATORIES	468.	468.
ALLSTATE CORP	2,500.	2,500.
BB & T CORPORATION	2,375.	2,375.
BANK OF AMERICA CORP	40.	40.
BEST BUY CO INC	336.	336.
BOEING CAP CORP	3,050.	3,050.
BRISTOL MYERS SQUIBB CO	1,240.	1,240.
CA INC	80.	80.
CHASE MAN CORP NEW	3,563.	3,563.
CITI GROUP INC	2,920.	2,920.
CLIFFS NATURAL RESOURCES INC	134.	134.
COMCAST CORP CL A	186.	186.
COMERICA INC	120.	120.
CONOCOPHILLIPS	573.	573.
CREDIT SUIS USA	3,250.	3,250.
DUKE ENERGY CORP	1,344.	1,344.
EMERSON ELEC CO	530.	530.
EXELON CORPORATION	525.	525.
EXXON MOBIL CORP	415.	415.
F F C B DEB	2,225.	2,225.
F H L B DEB	1,908.	1,908.
F N M A M T N	5,000.	5,000.
FIRST AMER MID CAP VALUE FD CL Y	443.	443.
FIRST AMERN GLOBL INFRAS CL Y	461.	461.
FIRST AMER INFLATION PRO SEC CL Y	116.	116.
GENERAL ELECTRIC CO	867.	867.
GENERAL ELECTRIC CO	2,500.	2,500.
GOLDMAN SACHS GROUP INC	303.	303.
GOLDMAN SACHS GROUP	313.	313.
HALLIBURTON CO	234.	234.
HESS CORP	180.	180.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES
 =====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
HEWLETT PACKARD CO	32.	32.
HOUSEHOLD FIN CORP	2,375.	2,375.
I T T CORPORATION	183.	183.
INTEL CORP	448.	448.
INTERNATIONAL BUSINESS MACHINES CORP	430.	430.
ISHARES MSCI EMERGING MKTS E T F	666.	666.
ISRAEL ST DLR BD	1,426.	1,426.
ISRAEL ST BD	1,063.	1,063.
ISRAEL ST DLR BD	1,188.	1,188.
J P MORGAN CHASE CO	204.	204.
JOHNSON JOHNSON	965.	965.
LAUDUS ROSEN INTL S C FD CL INV	630.	630.
MARATHON OIL CORPORATION	576.	576.
MCGRAW HILL COMPANIES INC	135.	135.
MEDTRONIC INC	314.	314.
MERRILL LYNCH CO	2,705.	2,705.
MICROSOFT CORP	111.	111.
NORFOLK SOUTHN CORP	544.	544.
OCCIDENTAL PETROLEUM CORPORATION	330.	330.
OMNICOM GROUP INC	210.	210.
ORACLE CORPORATION	75.	75.
P G E CORP	825.	825.
PEPSICO INC	525.	525.
PFIZER INC	400.	400.
PFIZER INC	1,271.	1,271.
LAUDUS INTL MRKTMASTERS INV FUND	1,134.	1,134.
FINANCIAL SELECT SECTOR SPDR FD	739.	739.
SONOCO PRODS CO	216.	216.
STANLEY WKS	291.	291.
TARGET CORPORATION	99.	99.
TEXAS INSTRUMENTS INC	225.	225.
UNITED TECHNOLOGIES CORP	616.	616.
V F CORP	712.	712.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
VALERO ENERGY CORP	270.	270.
VERIZON COMMUNICATIONS INC	1,206.	1,206.
WAL MART STORES INC	357.	357.
WERNER ENTERPRISES INC	1,350.	1,350.
WILLIAMS COS INC	528.	528.
WYETH	240.	240.
-----	-----	-----
TOTAL	64,569.	64,569.
=====	=====	=====

FORM 990PF, PART I - OTHER INCOME
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
FEDERAL TAX REFUND	996.	
LITIGATION PROCEED	828.	828.
TOTALS	1,824.	828.
	=====	=====

FORM 990PF, PART I - ACCOUNTING FEES
=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEE (NON-ALLOC	1,000.	500.		500.
TOTALS	1,000.	500.	NONE	500.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
OTHER PROFESSIONAL FEES	14,192.	11,354.	2,838.
TOTALS	14,192.	11,354.	2,838.

FORM 990PF, PART I - TAXES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
FOREIGN TAXES ON QUALIFIED FOR	331.	331.
FOREIGN TAXES ON NONQUALIFIED	11.	11.
TOTALS	342.	342.
	=====	=====

FORM 990PF, PART I - OTHER EXPENSES
=====

REVENUE
AND
EXPENSES
PER BOOKS

CHARITABLE
PURPOSES

DESCRIPTION

OTHER EXPENSES

20.

20.

TOTALS

20.

20.

HERBERT GOLDSTEN TRUST 58017730

36-3412270

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

=====

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
F F C B DEB 4.45%	49,658.	49,658.	51,266.
F N M A MTN 5.0%	99,889.	99,889.	107,625.
FF H L B DEB 3.62%	50,478.	50,478.	52,172.
TOTALS	200,025.	200,025.	211,063.

=====

FORM 990PF, PART II - CORPORATE STOCK

=====

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
GENERAL ELEC CO	31,945.	40,605.	25,721.
UNITED TECHNOLOGIES CORP	15,568.	15,568.	27,764.
CONOCOPHILLIPS	8,225.	8,225.	15,321.
EXXON MOBIL CORP	3,689.	3,689.	17,048.
HALLIBURTON CO	18,100.	18,100.	19,559.
MC GRAW-HILL COS INC	22,524.		
OMNICOM GROUP INC	14,341.	14,341.	13,703.
TARGET CORPORATION	6,222.	6,222.	7,256.
PEPSICO INC	11,643.	11,643.	18,240.
WAL MART STORES INC	31,939.		
AMGEN INC	14,258.	14,258.	14,143.
JOHNSON & JOHNSON	29,338.	29,338.	32,205.
WYETH	14,389.		
APOLLO GROUP INC	22,450.		
BANK OF AMERICA CORP	25,513.	27,380.	30,120.
VERIZON COMMUNICATIONS INC	19,033.	19,033.	21,535.
CISCO SYS INC	26,096.	26,096.	20,948.
HEWLETT PACKARD CO	10,436.		
INTEL CORP	18,238.	18,238.	16,320.
MICROSOFT CORP	20,532.		
TEXAS INSTRUMENTS INC	10,096.	10,096.	13,030.
EMERSON ELECTRIC CO	14,090.	14,090.	17,040.
FIRST AMER GLOBAL INFRAS CL Y	25,000.	25,000.	25,741.
FIRST AMER MID CAP VALUE FD CL	40,758.	40,758.	34,678.
FIRST AMER SMALL CAP GWTH OPP	47,000.	47,000.	46,004.
I T T CORPORATION		12,731.	11,192.
HESS CORP	14,034.	14,034.	27,225.
FREEMPORT MCMORAN COPPER & GOLD	20,424.	20,424.	48,174.
NORFOLK SOUTHN CORP	23,126.	23,126.	20,968.

FORM 990PF, PART II - CORPORATE STOCK

=====

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
-----	-----	-----	---
MARATHON OIL CORP	25,826.	25,826.	18,732.
COMCAST CORP CL A	18,760.		
ABBOTT LABS	15,426.	15,426.	16,197.
BRISTOL MYERS SQUIBB CO	32,106.	32,106.	25,250.
PFIZER INC	13,455.	13,455.	9,095.
EXELON CORP	19,363.	19,363.	12,218.
AMERICAN TOWER CORP	17,684.	17,684.	19,445.
INTERNATIONAL BUSINESS MACHINE	19,978.	19,978.	26,180.
ORACLE CORP	9,404.	9,404.	12,265.
AMER CENT NEW OPPORTU II CL IN	115,000.	102,729.	74,768.
LAUDUS INTL MRKTMASERS INV FD	200,000.	121,327.	87,992.
LAUDUS ROSEN INTL SC FD CL INV	50,000.	50,000.	23,505.
T T CORPORATION	12,731.		
VALERO ENERGY CORP	23,966.	23,966.	7,538.
WEATHERFORD INTL LTD	18,699.		
STANLEY WKS	14,934.		
MEDTRONIC INC	15,859.	15,859.	17,592.
THERMO FISCHER SCIENTIFIC INC	12,277.	12,277.	14,307.
GOLDMAN SACHS GROUP	20,060.	20,060.	33,768.
J P MORGAN CHASE	13,662.	21,290.	25,002.
TD AMERITRADE HLDGS CORP	28,823.		
P G & E CORP	17,910.	17,910.	22,325.
CA INC	13,081.	13,081.	11,230.
CLIFFS NATURAL RESOURCES INC		14,349.	36,872.
SONOCO PRODS CO		23,246.	23,400.
WERNER ENTERPRISES INC		16,231.	19,800.
OCCIDENTAL PETROLEUM CORP		27,213.	40,675.
WILLIAMS COS INC		18,389.	25,296.
BEST BUY CO INC		25,385.	31,568.

HERBERT GOLDSTEN TRUST 58017730

36-3412270

FORM 990PF, PART II - CORPORATE STOCK

=====

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
V F CORP		25,084.	29,296.
FOREST LABS INC		29,225.	32,110.
AFLAC INC		11,186.	41,625.
COMERICA INC		25,541.	35,484.
AT&T INC		33,069.	33,636.
BARCLAYS IPATH DJ AIG COMMODIT		20,619.	21,130.
FINANCIAL SELECT SECTOR SPDR F		25,620.	43,200.
ISHARES MSCI EMERGING MKTS ETF		30,600.	41,500.
TOTALS	1,288,011.	1,337,493.	1,436,936.

FORM 990PF, PART II - CORPORATE BONDS

=====

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
DUKE ENERGY CORP	50,223.		
CHASE MAN CORP NEW	99,028.		
CITI GROUP INC	99,437.		
CREDIT SUISSE F B	50,470.	50,470.	54,410.
BB & T CORPORATION	50,105.	50,105.	52,051.
GENERAL ELECTRIC CO	50,970.	50,970.	52,898.
HOUSEHOLD FIN CORP	46,950.	46,950.	52,062.
ALLSTATE CORP	50,616.	50,616.	52,658.
ISRAEL ST DLR BD 4.75%	25,000.	25,000.	25,000.
ISRAEL ST BD 4.25%	25,000.	25,000.	25,000.
BOEING CAP CORP	51,300.	51,300.	52,852.
MERRILL LYNCH CO	76,295.		
ISRAEL ST DLR BD 4.62%	25,563.	52,335.	52,985.
GOLDMAN SACHS GROUP		78,032.	79,088.
PFIZER INC		50,797.	54,645.
FIRST AMER INFLATION PRO SEC Y		13,439.	15,240.
TOTALS	700,957.	545,014.	568,889.

=====

FORM 990PF, PART II - OTHER ASSETS

=====

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
ACCRUED INCOME	75.	50.	50.
TOTALS	75.	50.	50.

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

=====

DESCRIPTION -----	AMOUNT -----
ROUNDING	2.

TOTAL	2.
	=====

STATE(S) WHERE THE FOUNDATION IS REGISTERED
=====

NE

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

=====

OFFICER NAME:
 JOSEPH KIRSHENBAUN
 ADDRESS:
 1742 CRAWFORD ROAD
 OMAHA, NE
 TITLE:
 PRESIDENT
 AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 4

OFFICER NAME:
 HOWARD J. KASLOW
 ADDRESS:
 2403 SOUTH 102ND STREET
 OMAHA, NE
 TITLE:
 SEC/TREAS.
 AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 4

OFFICER NAME:
 ANN GOLDSTEIN
 ADDRESS:
 9856 DEVONSHIRE DRIVE
 OMAHA, NE
 TITLE:
 VICE-PRESIDENT
 AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 4

OFFICER NAME:
 NORMAN VEITZER
 ADDRESS:
 12617 CRYER AVENUE
 OMAHA, NE
 TITLE:
 VICE-PRESIDENT
 AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 4

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

=====

OFFICER NAME:

ROBERT L. BELGRADE

ADDRESS:

1015 S 78TH ST
OMAHA, NE 68114

TITLE:

VICE-PRESIDENT

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 4

=====

RECIPIENT NAME:
 NATIONAL HOLOCAUST ENDOWMENT FD
 RELATIONSHIP:
 NONE
 PURPOSE OF GRANT:
 HOLOCAUST EDUCATION
 FOUNDATION STATUS OF RECIPIENT:
 N/A
 AMOUNT OF GRANT PAID 3,000.

RECIPIENT NAME:
 BETH EL SYNAGOGUE
 ADDRESS:
 14506 CALIFORNIA STREET
 OMAHA, NE 68154
 RELATIONSHIP:
 NONE
 PURPOSE OF GRANT:
 GENERAL SUPPORT
 FOUNDATION STATUS OF RECIPIENT:
 N/A
 AMOUNT OF GRANT PAID 8,367.

RECIPIENT NAME:
 THE JEWISH PRESS
 RELATIONSHIP:
 NONE
 PURPOSE OF GRANT:
 WALL OF COMMUNITY NEWSPAPER HISTORY
 FOUNDATION STATUS OF RECIPIENT:
 NONE
 AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
 JEWISH FEDERATION OF
 OMAHA
 ADDRESS:
 333 S 132ND STREET
 OMAHA, NE 68154
 RELATIONSHIP:
 NONE
 PURPOSE OF GRANT:
 UNRESTRICTED
 FOUNDATION STATUS OF RECIPIENT:
 N/A
 AMOUNT OF GRANT PAID 43,500.

=====

RECIPIENT NAME:

NEBRASKA JEWISH
HISTORICAL SOCIETY

ADDRESS:

333 S 132ND STREET
OMAHA, NE 68154

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

N/A

AMOUNT OF GRANT PAID 2,225.

RECIPIENT NAME:

JEWISH COMMUNITY CENTER

ADDRESS:

333 S 132ND STREET
OMAHA, NE 68154

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL

FOUNDATION STATUS OF RECIPIENT:

N/A

AMOUNT OF GRANT PAID 15,700.

RECIPIENT NAME:

CENTER FOR JEWISH EDUCATION

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL

FOUNDATION STATUS OF RECIPIENT:

N/A

AMOUNT OF GRANT PAID 10,000.

=====

RECIPIENT NAME:

INSTITUTE FOR HOLOCAUST EDUCATION

ADDRESS:

333 SOUTH 132ND ST

OMAHA, NE 68154

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL

FOUNDATION STATUS OF RECIPIENT:

N/A

AMOUNT OF GRANT PAID 16,600.

TOTAL GRANTS PAID:

109,392.

=====

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

OMB No 1545-0092

2009

Name of estate or trust

HERBERT GOLDSTEN TRUST 58017730

Employer identification number

36-3412270

Note: Form 5227 filers need to complete only Parts I and II.

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					
b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b					1b 17,791.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824					2
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts					3
4 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet					4 ()
5 Net short-term gain or (loss). Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back					5 17,791.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					
b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b					6b -80,652.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824					7
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts					8
9 Capital gain distributions					9
10 Gain from Form 4797, Part I					10
11 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet					11 ()
12 Net long-term gain or (loss). Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back					12 -80,652.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2009

Part III Summary of Parts I and II		(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
Caution: Read the instructions before completing this part.				
13	Net short-term gain or (loss)	13		17,791.
14	Net long-term gain or (loss):			
a	Total for year	14a		-80,652.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht)	14b		
c	28% rate gain	14c		
15	Total net gain or (loss). Combine lines 13 and 14a	15		-62,861.

Note: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary

Part IV Capital Loss Limitation

16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of:	16	(3,000)
a	The loss on line 15, column (3) or b \$3,000		

Note: If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 7 of the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the worksheet on page 8 of the instructions if:

- Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)	17	
18	Enter the smaller of line 14a or 15 in column (2) but not less than zero	18	
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19	
20	Add lines 18 and 19	20	
21	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0-	21	
22	Subtract line 21 from line 20. If zero or less, enter -0-	22	
23	Subtract line 22 from line 17. If zero or less, enter -0-	23	
24	Enter the smaller of the amount on line 17 or \$2,300	24	
25	Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> Yes. Skip lines 25 and 26; go to line 27 and check the "No" box <input type="checkbox"/> No. Enter the amount from line 23	25	
26	Subtract line 25 from line 24	26	
27	Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> Yes. Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> No. Enter the smaller of line 17 or line 22	27	
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)	28	
29	Subtract line 28 from line 27	29	
30	Multiply line 29 by 15% (.15)	30	
31	Figure the tax on the amount on line 23. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	31	
32	Add lines 30 and 31	32	
33	Figure the tax on the amount on line 17 Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	33	
34	Tax on all taxable income Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	34	

