



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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

2009

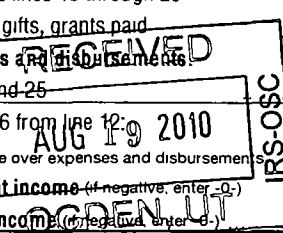
Note The foundation may be able to use a copy of this return to satisfy state reporting requirements

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

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 NUSBAUM FAMILY FOUNDATION		A Employer identification number 38-2917028	
	Number and street (or P O box number if mail is not delivered to street address) 26575 WILLOWGREEN		Room/suite	B Telephone number 248-540-5760
	City or town, state, and ZIP code FRANKLIN, MI 48025		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"/>	
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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>		
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 1,065,680.		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	1,009,000.		N/A	
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	17.	17.		
	4 Dividends and interest from securities	10,360.	10,360.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-80,868.			
	b Gross sales price for all assets on line 6a	102,690.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total Add lines 1 through 11	938,509.	10,377.			
Operating and Administrative Expenses	13 Compensation of officers directors trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 1	7,587.	3,794.		3,793.
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 2	152.	152.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
23 Other expenses STMT 3	5,302.	5,302.		0.	
24 Total operating and administrative expenses. Add lines 13 through 23	13,041.	9,248.		3,793.	
25 Contributions, gifts, grants paid	134,239.			134,239.	
26 Total expenses and disbursements. Add lines 24 and 25	147,280.	9,248.		138,032.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	791,229.				
b Net investment income (if negative, enter -0-)		1,129.			
c Adjusted net income (if negative, enter -0-)			N/A		



Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing					
	2 Savings and temporary cash investments			26,204.	489,748.	488,787.
	3 Accounts receivable ▶					
	Less: allowance for doubtful accounts ▶					
	4 Pledges receivable ▶					
	Less: allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons					
	7 Other notes and loans receivable ▶					
	Less: allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments - U.S. and state government obligations STMT 4			0.	51,793.	52,136.
	b Investments - corporate stock STMT 5			0.	455,164.	449,757.
	c Investments - corporate bonds					
Liabilities	11 Investments - land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
	12 Investments - mortgage loans					
	13 Investments - other STMT 6			274,968.	95,696.	75,000.
	14 Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation ▶					
	15 Other assets (describe ▶)					
	16 Total assets (to be completed by all filers)			301,172.	1,092,401.	1,065,680.
	17 Accounts payable and accrued expenses					
	18 Grants payable					
Net Assets or Fund Balances	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.		
Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	27 Capital stock, trust principal, or current funds			0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds			301,172.	1,092,401.	
	30 Total net assets or fund balances			301,172.	1,092,401.	
31 Total liabilities and net assets/fund balances			301,172.	1,092,401.		

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	301,172.
2 Enter amount from Part I, line 27a	2	791,229.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,092,401.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,092,401.

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 PUBLICLY TRADED SECURITIES			
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 102,690.		183,558.	-80,868.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
a			-80,868.
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	-80,868.
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	214,492.	286,566.	.748491
2007	86,894.	521,949.	.166480
2006	198,774.	705,374.	.281799
2005	247,882.	894,332.	.277170
2004	210,938.	1,077,849.	.195703

2 Total of line 1, column (d)	2	1.669643
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	.333929
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	92,979.
5 Multiply line 4 by line 3	5	31,048.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	11.
7 Add lines 5 and 6	7	31,059.
8 Enter qualifying distributions from Part XII, line 4	8	138,032.

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	11.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	11.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	11.
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		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here <input 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		11.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>MI</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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? Website address ► <u>NA</u>	13	X	
14	The books are in care of ► <u>CENDROWSKI SELECKY PROFESSIONAL COR</u> Telephone no. ► <u>248-540-5760</u> Located at ► <u>4111 ANDOVER ROAD, WEST-THIRD FLOOR, BLOOMFIELD HI</u> ZIP+4 ► <u>48302-1925</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15		N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If "Yes," list the years ► _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b X

Form 990-PF (2009)

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
IRVING NUSBAUM 26575 WILLOWGREEN FRANKLIN, MI 48025	PRESIDENT 0.00	0.	0.	0.
BARBARA NUSBAUM 26575 WILLOWGREEN FRANKLIN, MI 48025	SECRETARY 0.00	0.	0.	0.
MICHAEL ROTH 27750 STANSBURY FARMINGTON HILLS, MI 48334	DIRECTOR 0.00	0.	0.	0.
BRUCE H. SEYBURN 2000 TOWN CENTER #1500 SOUTHFIELD, MI 48075	DIRECTOR 0.00	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.)

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	73,243.
b	Average of monthly cash balances	1b	21,152.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	94,395.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	94,395.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,416.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	92,979.
6	Minimum investment return. Enter 5% of line 5	6	4,649.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	4,649.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	11.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	11.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	4,638.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	4,638.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	4,638.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	138,032.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	138,032.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	11.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	138,021.

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.

Form 990-PF (2009)

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				4,638.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	158,396.			
b From 2005	204,471.			
c From 2006	164,291.			
d From 2007	61,568.			
e From 2008	200,482.			
f Total of lines 3a through e	789,208.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$	138,032.			
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				4,638.
e Remaining amount distributed out of corpus	133,394.			
5 Excess distributions carryover applied to 2009 (if an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	922,602.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	158,396.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	764,206.			
10 Analysis of line 9:				
a Excess from 2005	204,471.			
b Excess from 2006	164,291.			
c Excess from 2007	61,568.			
d Excess from 2008	200,482.			
e Excess from 2009	133,394.			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

- 1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling

- b**
- Check box to indicate whether the foundation is a private operating foundation described in section
- ☐
- 4942(j)(3) or
- ☐
- 4942(j)(5)

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

Recipient	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
Name and address (home or business)				
a Paid during the year SEE ATTACHED STATEMENT				
Total			▶ 3a	134,239.
b Approved for future payment NONE				
Total			▶ 3b	0.

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization

Employer identification number

NUSBAUM FAMILY FOUNDATION

38-2917028

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions
for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

NUSBAUM FAMILY FOUNDATION

38-2917028

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	IRVING NUSBAUM 26575 WILLOWGREEN FRANKLIN, MI 48025	\$ 1,000,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
2	CONGREGATION BETH AHM 5075 WEST MAPLE ROAD WEST BLOOMFIELD, MI 48322	\$ 9,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

FORM 990-PF	ACCOUNTING FEES			STATEMENT 1
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	7,587.	3,794.		3,793.
TO FORM 990-PF, PG 1, LN 16B	7,587.	3,794.		3,793.

FORM 990-PF	TAXES			STATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
2008 FEDERAL TAX	152.	152.		0.
TO FORM 990-PF, PG 1, LN 18	152.	152.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BROKERAGE MAINTENANCE FEE	150.	150.		0.
INSURANCE EXPENSE	4,661.	4,661.		0.
LICENSE FEE	20.	20.		0.
DUES/MISCELLANEOUS FEES	471.	471.		0.
TO FORM 990-PF, PG 1, LN 23	5,302.	5,302.		0.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 4

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
MUNICIPAL BONDS		X	51,793.	52,136.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			51,793.	52,136.
TOTAL TO FORM 990-PF, PART II, LINE 10A			51,793.	52,136.

FORM 990-PF CORPORATE STOCK STATEMENT 5

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS/CEF/UIT	455,164.	449,757.
TOTAL TO FORM 990-PF, PART II, LINE 10B	455,164.	449,757.

FORM 990-PF OTHER INVESTMENTS STATEMENT 6

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS	COST	95,696.	75,000.
TOTAL TO FORM 990-PF, PART II, LINE 13		95,696.	75,000.

FORM 990-PF PART XV - LINE 1A
LIST OF FOUNDATION MANAGERS STATEMENT 7

NAME OF MANAGER

IRVING NUSBAUM
BARBARA NUSBAUM

NUSBAUM FAMILY FOUNDATION ID #38-2917028
Grants & Contributions Paid During the Year
Form 990-PF (2009), Part XV
December 31, 2009

<u>Date</u>	<u>Recipient Name</u>	<u>Ck No</u>	<u>Relationship</u>	<u>Status</u>	<u>Purpose</u>	<u>Disbursement Contributions</u>
12/14/2008	JWI	1376	None	Public	General/Unrestricted	100 00
1/6/2009	Michigan Opera Theatre	1379	None	Public	General/Unrestricted	10,000.00
1/13/2009	JARC	1380	None	Public	General/Unrestricted	36 00
1/13/2009	JARC	1381	None	Public	General/Unrestricted	2,000 00
1/13/2009	FHS Kreger Fund	1382	None	Public	General/Unrestricted	500 00
2/16/2009	Congregation Beth Tefico	1385	None	Public	General/Unrestricted	500 00
2/16/2009	JARC	1386	None	Public	General/Unrestricted	68 00
2/18/2009	Jewish Hospice and Network	1387	None	Public	General/Unrestricted	1,000 00
3/12/2009	Congregation Beth Ahm	1389	None	Public	General/Unrestricted	11,200 00
3/12/2009	Holocaust Memorial Center	1390	None	Public	General/Unrestricted	500 00
4/2/2009	Glenwood Ort	1391	None	Public	General/Unrestricted	36 00
4/2/2009	Friends of Hebrew Free Loan	1392	None	Public	General/Unrestricted	500 00
4/2/2009	JARC	1393	None	Public	General/Unrestricted	1,000 00
4/20/2009	Congregation Beth Ahm	1394	None	Public	General/Unrestricted	18 00
4/21/2009	Hillel Day School of Metro Detroit	1395	None	Public	General/Unrestricted	2,800 00
4/27/2009	Yesiva Gedoliah Rabbinical Coll	1396	None	Public	General/Unrestricted	150 00
4/28/2009	JARC	1397	None	Public	General/Unrestricted	86 00
5/5/2009	Congregation Beth Ahm	1398	None	Public	General/Unrestricted	10,000 00
5/5/2009	Etzion Foundation	1399	None	Public	General/Unrestricted	2,500 00
5/5/2009	JAS	1400	None	Public	General/Unrestricted	150 00
5/12/2009	Detroit Institute of Arts	1401	None	Public	General/Unrestricted	285 00
5/12/2009	JARC	1402	None	Public	General/Unrestricted	18 00
5/13/2009	Cleveland Clinic	1403	None	Public	General/Unrestricted	10,000 00
5/18/2009	Ann Arbor St Art Fair	1405	None	Public	General/Unrestricted	300 00
5/28/2009	JARC	1406	None	Public	General/Unrestricted	18 00
5/28/2009	Michigan Opera Theatre	1407	None	Public	General/Unrestricted	2,000.00
6/4/2009	Congregation Beth Ahm	1410	None	Public	General/Unrestricted	10,000 00
6/16/2009	JARC	1411	None	Public	General/Unrestricted	50 00
6/22/2009	The Jewish Theological Seminar	1412	None	Public	General/Unrestricted	500 00
6/29/2009	Yad Ezra	1413	None	Public	General/Unrestricted	10,000 00
7/6/2009	Jewish Federation of Metropolitan Detroit	1414	None	Public	General/Unrestricted	162 00
7/7/2009	JARC	1415	None	Public	General/Unrestricted	36 00
7/7/2009	Wayne State University	1416	None	Public	General/Unrestricted	8,000 00
7/13/2009	JARC	1417	None	Public	General/Unrestricted	100.00
7/30/2009	American Friends of Barilan Univ	1418	None	Public	General/Unrestricted	11,000 00
8/4/2009	JARC	1419	None	Public	General/Unrestricted	18 00
8/10/2009	Jewish Federation of Metropolitan Detroit	1422	None	Public	General/Unrestricted	35,000 00
8/14/2009	JARC	1423	None	Public	General/Unrestricted	54 00
8/18/2009	JARC	1424	None	Public	General/Unrestricted	50 00
9/21/2009	The Anti-Defamation League	1426	None	Public	General/Unrestricted	400 00
10/8/2009	JARC	1428	None	Public	General/Unrestricted	18 00
10/12/2009	JARC	1429	None	Public	General/Unrestricted	18 00
11/10/2009	JARC	1430	None	Public	General/Unrestricted	50 00
11/16/2009	JARC	1431	None	Public	General/Unrestricted	18 00
12/18/2009	The Jewish Hospice & Chaplaincy Network	1433	None	Public	General/Unrestricted	3,000 00
						<u>134,239 00</u>



Merrill Lynch

EMASM Fiscal Statement

THE NUSBAUM FAMILY FOUNDATION

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/09	Unrealized Gain or (Loss)	Est Accrued Interest	Est Annual Income
Cash and Money Funds							
189,747	CASH		0.92				
	ML BANK DEPOSIT PROGRAM	06/16/00	189,747.00	189,747.00			94.87
	Total Cash and Money Funds		189,747.92	189,747.92			94.87
Certificates of Deposit and Equivalents							
100,000	CD FIRSTBANK OF PR SANTURCE, PR 00.400% JUN 23 2010	12/15/09	100,000.00	99,677.40	(322.60)	8.77	400.00
100,000	CD FIRSTBANK OF PR SANTURCE, PR 00.500% SEP 23 2010	12/15/09	100,000.00	99,503.50	(496.50)	10.96	500.00
100,000	CD BANK OF AMERICA NA CHARLOTTE, NC 00.300% MAR 23 2010	12/15/09	100,000.00	99,831.60	(168.40)	6.58	300.00
	Total Certificates of Deposit and Equivalents		300,000.00	299,012.50	(987.50)	26.31	1,200.00
Municipal Bonds							
50,000	DAUPHIN CNTY PA NTS D RF OID NPFG TAXABLE MAY04 05.300%MAR01 17	12/17/09	51,793.10	51,253.00	(540.10)	883.33	2,650.00
	Total Municipal Bonds		51,793.10	51,253.00	(540.10)	883.33	2,650.00

PLEASE SEE REVERSE SIDE
Statement Period
Year Ending 12/31/09
Page
5 of 19
Account No.
689-04158

01656216

X





THE NUSBAUM FAMILY FOUNDATION

EMASM Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/09	Unrealized Gain or (Loss)	Est Annual Income
Mutual Funds/Closed End Funds/UIT						
6,807	EVERGREEN ASSET ALLOCATION FD CL C .9530 Fractional Share	12/16/09	76,231.42	75,149.28	(1,082.14)	1,259.00
		12/16/09		10.52		1.00
1,408	THORNBURG INCOME BUILDER FUND CLASS C .5360 Fractional Share	12/16/09	25,011.43	25,118.72	107.29	1,389.00
		12/16/09		9.56		1.00
6,604	PIMCO ALL ASSET FUND CLASS C .5370 Fractional Share	12/16/09	78,182.67	74,757.28	(3,425.39)	4,860.00
		12/16/09		6.07		1.00
2,299	IVY ASSET STRATEGY FUND CL C .6620 Fractional Share	12/16/09	49,985.60	50,072.22	86.62	
		12/16/09		14.41		
6,487	JP MORGAN STRATEGIC INCOME OPP FUND CL C .4260 Fractional Share	12/16/09	74,995.06	75,054.59	59.53	2,309.00
		12/16/09		4.92		1.00
3,391	IVA WORLDWIDE FUND CL C .7670 Fractional Share	12/16/09	49,988.69	49,712.06	(276.63)	
		12/16/09		11.24		
4,474	BLACKROCK GLOBAL ALLOCATION FD INC C .7590 Fractional Share	12/16/09	75,778.92	74,894.76	(884.16)	918.00
		12/16/09		12.70		1.00
2,215	FRANKLIN UTILITIES FD CL C .8380 Fractional Share	12/16/09	24,990.54	24,918.75	(71.79)	807.00
		12/16/09		9.42		1.00
Total Mutual Funds/Closed End Funds/UIT			455,164.33	449,756.50	(5,486.67)	11,548.00

PLEASE SEE REVERSE SIDE
Page 6 of 19
Statement Period Year Ending 12/31/09
Account No. 689-04158

