Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , 2009, 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.

BARATZ FAMILY FOUNDATION, INC
600 SOUTH HY 169 #701
MINNEAPOLIS, MN 55426

A Employer identification number: 41-1295774
B Telephone number (see the instructions)
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. [X] 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, column (c), line 16)* ► $ 357,045.

J Accounting method. [X] Cash ☐ Accrual ☐ 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 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 (att sch)	64,596.			
	2 Ck ► ☐ if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	10,321.	10,321.	10,321.	
	4 Dividends and interest from securities	9,614.	9,614.	9,614.	
	5a Gross rents				
	b Net rental income or (loss)		STATEMENT 1		
	6a Net gain/(loss) from sale of assets not on line 10	-4,085.			
	b Gross sales price for all assets on line 6a 282,413.				
	7 Capital gain net income (from Part IV, line 2)				
	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/(loss) (att sch)				
	11 Other income (attach schedule)				
	12 **Total.** Add lines 1 through 11	80,446.	19,935.	19,935.	
OPERATING AND ADMINISTRATIVE EXPENSES	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) SEE ST 2	76.	76.	76.	
	b Accounting fees (attach sch) SEE ST 3	5,861.	5,861.	5,861.	
	c Other prof fees (attach sch)				
	17 Interest	69.	69.	69.	
	18 Taxes (attach schedule)(see instr) SEE STMT 4	184.	184.	184.	
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 **Total operating and administrative expenses.** Add lines 13 through 23	6,190.	6,190.	6,190.	
	25 Contributions, gifts, grants paid STMT 5	158,283.			158,283.
	26 **Total expenses and disbursements.** Add lines 24 and 25	164,473.	6,190.	6,190.	158,283.
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	-84,027.			
	b **Net investment income** (if negative, enter 0)		13,745.		
	c **Adjusted net income** (if negative, enter 0)			13,745.	

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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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
ASSETS	1	Cash — non-interest-bearing		95,695.	35,763.	35,762.
	2	Savings and temporary cash investments				
	3	Accounts receivable ►	460.			
		Less: allowance for doubtful accounts ►			460.	460.
	4	Pledges receivable ►				
		Less. allowance for doubtful accounts ►				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)				
	7	Other notes and loans receivable (attach sch) ►				
		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 (attach schedule)				
	b	Investments — corporate stock (attach schedule)		417,229.	407,671.	265,823.
	c	Investments — corporate bonds (attach schedule)		70,000.	55,000.	55,000.
	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 ► SEE STATEMENT 6)			2.	
	16	**Total assets** (to be completed by all filers — see instructions. Also, see page 1, item I)		582,924.	498,896.	357,045.
LIABILITIES	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, & other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ►)				
	23	**Total liabilities** (add lines 17 through 22)		0.	0.	
NET ASSETS OR FUND BALANCES		**Foundations that follow SFAS 117, check here ► [X] and complete lines 24 through 26 and lines 30 and 31.**				
	24	Unrestricted		582,924.	498,896.	
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here ► [ ] and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, building, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	**Total net assets or fund balances** (see the instructions)		582,924.	498,896.	
	31	**Total liabilities and net assets/fund balances** (see the instructions)		582,924.	498,896.	

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	582,924.
2	Enter amount from Part I, line 27a	2	-84,027.
3	Other increases not included in line 2 (itemize) ►	3	
4	Add lines 1, 2, and 3	4	498,897.
5	Decreases not included in line 2 (itemize) ► SEE STATEMENT 7	5	1.
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	498,896.

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 shares MLC Company)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a	N/A			
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) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
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**

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 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 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 (column (b) divided by column (c))
2008	328,472.	619,921.	0.529861
2007	252,383.	909,392.	0.277529
2006	295,111.	761,223.	0.387680
2005	207,763.	176,632.	1.176248
2004	146,789.	289,689.	0.506712

2	**Total** of line 1, column (d)	2	2.878030
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	0.575606
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	322,088.
5	Multiply line 4 by line 3	5	185,396.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	137.
7	Add lines 5 and 6	7	185,533.
8	Enter qualifying distributions from Part XII, line 4	8	158,283.

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 the instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here ► ☐ and enter 'N/A' on line 1. Date of ruling or determination letter: ________ (attach copy of letter if necessary - see instr.) b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► ☐ 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, column (b)		1	275.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	275.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 **Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-		5	275.
6 Credits/Payments			
a 2009 estimated tax pmts 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 ☐ 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	275.
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** ►	**Refunded** ►	11	

Part VII-A Statements Regarding Activities

		Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1b		X
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.			
c Did the foundation file **Form 1120-POL** for this year?	1c		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.*	2		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*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If 'Yes,' has it filed a tax return on **Form 990-T** for this year?	4b	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If 'Yes,' attach the statement required by General Instruction T*	5		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?	6	X	
7 Did the foundation have at least $5,000 in assets at any time during the year? *If 'Yes,' complete Part II, column (c), and Part XV*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see the instructions) ► MN			
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*	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? *If 'Yes,' complete Part XIV*	9		X
10 Did any persons become substantial contributors during the tax year? *If 'Yes,' attach a schedule listing their names and addresses.* SEE STATEMENT 8	10	X	

Part VII-A Statements Regarding Activities *Continued*

			Yes	No
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 ► STAN BARATZ Telephone no. ►

Located at ► 600 SOUTH HIGHWAY 169 #701 MINNEAPOLIS MN ZIP + 4 ► 55426

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here N/A ► ☐

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
1 a	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?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ 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)?	☐ Yes ☒ 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.)	☐ Yes ☒ 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 the instructions)?		1 b	N/A	
	Organizations relying on a current notice regarding disaster assistance check here	► ☐			
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?		1 c		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?	☐ Yes ☒ No			
	If 'Yes,' list the years ► 20__ , 20__ , 20__ , 20__ .				
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 the instructions)		2 b	N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ► 20__ , 20__ , 20__ , 20__ .				
3 a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ 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)*		3 b	N/A	
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4 a		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?		4 b		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 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 instructions)? **5b** N/A

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** No: 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? **7b** N/A

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 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
STAN BARATZ 600 SOUTH HY 169 #701 MINNEAPOLIS, MN 55426	PRESIDENT 0	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1— see 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				

Total number of other employees paid over $50,000 ► 0

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 instructions). If none, enter 'NONE.'**

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ►		0

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 N/A	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ►	0.

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	265,216.
b	Average of monthly cash balances		1b	61,777.
c	Fair market value of all other assets (see instructions)		1c	
d	**Total** (add lines 1a, b, and c)		1d	326,993.
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	326,993.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)		4	4,905.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4		5	322,088.
6	**Minimum investment return.** Enter 5% of line 5		6	16,104.

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	16,104.
2a	Tax on investment income for 2009 from Part VI, line 5	2a 275.		
b	Income tax for 2009 (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	275.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	15,829.
4	Recoveries of amounts treated as qualifying distributions		4	
5	Add lines 3 and 4		5	15,829.
6	Deduction from distributable amount (see instructions)		6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	15,829.

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	158,283.
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	
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	158,283.
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 instructions)	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	158,283.

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					15,829.
2 Undistributed income, if any, as of the end of 2009:					
a Enter amount for 2008 only				0.	
b Total for prior years: 20___, 20___, 20___			0.		
3 Excess distributions carryover, if any, to 2009:					
a From 2004	133,893.				
b From 2005	199,081.				
c From 2006	257,447.				
d From 2007	207,293.				
e From 2008	297,858.				
f **Total** of lines 3a through e		1,095,572.			
4 Qualifying distributions for 2009 from Part XII, line 4 ► $ 158,283.					
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					15,829.
e Remaining amount distributed out of corpus		142,454.			
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		1,238,026.			
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 instructions				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) (see instructions)		0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)		133,893.			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a		1,104,133.			
10 Analysis of line 9:					
a Excess from 2005	199,081.				
b Excess from 2006	257,447.				
c Excess from 2007	207,293.				
d Excess from 2008	297,858.				
e Excess from 2009	142,454.				

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

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)

	Tax year	Prior 3 years			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon. a 'Assets' alternative test – enter. (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c 'Support' alternative test – enter. (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year – see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2))

NONE

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

NONE

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

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

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

SEE STATEMENT 9

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

SEE STATEMENT FOR LINE 2A

c Any submission deadlines.

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

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
a *Paid during the year*				
Total			► 3a	
b *Approved for future payment*				
Total			► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income (see the instructions)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	10,321.	
4 Dividends and interest from securities			14	9,614.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			14	-4,085.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				15,850.	

13 **Total.** Add line 12, columns (b), (d), and (e) 13 15,850.

(See worksheet in the instructions for line 13 to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See the instructions.)
N/A	

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash	1a (1)		X
(2) Other assets	1a (2)		X
b Other transactions.			
(1) Sales of assets to a noncharitable exempt organization	1b (1)		X
(2) Purchases of assets from a noncharitable exempt organization	1b (2)		X
(3) Rental of facilities, equipment, or other assets	1b (3)		X
(4) Reimbursement arrangements	1b (4)		X
(5) Loans or loan guarantees	1b (5)		X
(6) Performance of services or membership or fundraising solicitations	1b (6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is 'Yes,' complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
N/A			

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If 'Yes,' complete the following schedule.

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

SIGN HERE

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

► [signature] 4/1/10 ► President

Signature of officer or trustee Date Title

Paid Preparer's Use Only			
Preparer's signature ► [signature]	Date 3/11/10	Check if self-employed ► ☐	Preparer's Identifying number (See Signature in the instrs) P00761142
Firm's name (or yours if self employed), address, and ZIP code ► PERRON & EWALD LTD. 12219 WOOD LAKE DR SUITE 200 BURNSVILLE, MN 55337		EIN ► 41-1531705	Phone no ► (952) 894-9711

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
BARATZ FAMILY FOUNDATION, INC	41-1295774

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)/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 their 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).

Name of organization	Employer identification number
BARATZ FAMILY FOUNDATION, INC	41-1295774

Part I **Contributors** (see instructions.)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	SHIRLEY BARATZ 600 SOUTH HY 169 #701 MINNEAPOLIS, MN 55426	$ 64,596.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

Name of organization: BARATZ FAMILY FOUNDATION, INC

Employer identification number: 41-1295774

Part II Noncash Property (see instructions.)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	850 SHARES INTERSOLL RAND ON NOV 22, 2009 1075 SHARES PRIDE INTERNATIONAL ON NOV 22, 2009	$ 64,596.	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization: BARATZ FAMILY FOUNDATION, INC

Employer identification number: 41-1295774

Part III *Exclusively* **religious, charitable, etc, individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than $1,000 for the year.** (Complete cols (a) through (e) and the following line entry.)

For organizations completing Part III, enter total of *exclusively* religious, charitable, etc, contributions of **$1,000 or less** for the year. (Enter this information once – see instructions.) ► $ N/A

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

STATEMENT 1
FORM 990-PF, PART I, LINE 6A
NET GAIN (LOSS) FROM NONINVENTORY SALES PER BOOKS
ASSETS NOT INCLUDED IN PART IV

DESCRIPTION:	1000 MOSAIC		
DATE ACQUIRED:	10/07/2008		
HOW ACQUIRED:	PURCHASE		
DATE SOLD:	2/20/2009		
TO WHOM SOLD:			
GROSS SALES PRICE:	42,301.		
COST OR OTHER BASIS:	34,125.		
BASIS METHOD:	COST		
		GAIN (LOSS)	8,176.
DESCRIPTION:	10 MOSAIC PUTS		
DATE ACQUIRED:	11/21/2009		
HOW ACQUIRED:	PURCHASE		
DATE SOLD:	9/24/2009		
TO WHOM SOLD:			
GROSS SALES PRICE:	794.		
COST OR OTHER BASIS:	0.		
BASIS METHOD:	COST		
		GAIN (LOSS)	794.
DESCRIPTION:	2000 GRAMERCY CAPITAL CORP		
DATE ACQUIRED:	7/15/2008		
HOW ACQUIRED:	PURCHASE		
DATE SOLD:	4/16/2009		
TO WHOM SOLD:			
GROSS SALES PRICE:	9,424.		
COST OR OTHER BASIS:	27,215.		
BASIS METHOD:	COST		
		GAIN (LOSS)	-17,791.
DESCRIPTION:	150000 DUETSCHE MORT BOND		
DATE ACQUIRED:	4/16/2009		
HOW ACQUIRED:	PURCHASE		
DATE SOLD:	6/17/2009		
TO WHOM SOLD:			
GROSS SALES PRICE:	43,606.		
COST OR OTHER BASIS:	40,110.		
BASIS METHOD:	COST		
		GAIN (LOSS)	3,496.
DESCRIPTION:	100000 FEDL NATL MORG		
DATE ACQUIRED:	3/18/2009		
HOW ACQUIRED:	PURCHASE		
DATE SOLD:	4/30/2009		
TO WHOM SOLD:			
GROSS SALES PRICE:	21,322.		
COST OR OTHER BASIS:	20,452.		
BASIS METHOD:	COST		
		GAIN (LOSS)	870.

STATEMENT 1 (CONTINUED)
FORM 990-PF, PART I, LINE 6A
NET GAIN (LOSS) FROM NONINVENTORY SALES PER BOOKS
ASSETS NOT INCLUDED IN PART IV

DESCRIPTION: 50000 ROYAL BANK CDA
DATE ACQUIRED: 4/14/2009
HOW ACQUIRED: PURCHASE
DATE SOLD: 7/17/2009
TO WHOM SOLD:
GROSS SALES PRICE: 50,000.
COST OR OTHER BASIS: 50,000.
BASIS METHOD: COST
GAIN (LOSS) 0.

DESCRIPTION: 25000 ROYAL BANK CDA
DATE ACQUIRED: 7/27/2009
HOW ACQUIRED: PURCHASE
DATE SOLD: 10/30/2009
TO WHOM SOLD:
GROSS SALES PRICE: 25,000.
COST OR OTHER BASIS: 25,000.
BASIS METHOD: COST
GAIN (LOSS) 0.

DESCRIPTION: 25000 ROYAL BANK CDA
DATE ACQUIRED: 7/27/2009
HOW ACQUIRED: PURCHASE
DATE SOLD: 10/30/2009
TO WHOM SOLD:
GROSS SALES PRICE: 25,000.
COST OR OTHER BASIS: 25,000.
BASIS METHOD: COST
GAIN (LOSS) 0.

DESCRIPTION: 1075 PRIDE INTERNATIONAL
DATE ACQUIRED: 11/22/2009
HOW ACQUIRED: PURCHASE
DATE SOLD: 11/24/2009
TO WHOM SOLD:
GROSS SALES PRICE: 34,448.
COST OR OTHER BASIS: 34,174.
BASIS METHOD: COST
GAIN (LOSS) 274.

DESCRIPTION: 850 INGERSOLL RAND
DATE ACQUIRED: 11/22/2009
HOW ACQUIRED: PURCHASE
DATE SOLD: 11/24/2009
TO WHOM SOLD:
GROSS SALES PRICE: 30,512.
COST OR OTHER BASIS: 30,422.
BASIS METHOD: COST
GAIN (LOSS) 90.

STATEMENT 1 (CONTINUED)
FORM 990-PF, PART I, LINE 6A
NET GAIN (LOSS) FROM NONINVENTORY SALES PER BOOKS
ASSETS NOT INCLUDED IN PART IV

DESCRIPTION: CAP GAIN DISTRIBUTION
DATE ACQUIRED: 1/01/2009
HOW ACQUIRED: PURCHASE
DATE SOLD: 12/31/2009
TO WHOM SOLD:
GROSS SALES PRICE: 6.
COST OR OTHER BASIS: 0.
BASIS METHOD: COST

GAIN (LOSS) 6.

TOTAL $ -4,085.

STATEMENT 2
FORM 990-PF, PART I, LINE 16A
LEGAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
	$ 76.	$ 76.	$ 76.	
TOTAL	$ 76.	$ 76.	$ 76.	$ 0.

STATEMENT 3
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BOOKKEEPING	$ 138.	$ 138.	$ 138.	
PERRON EWALD	5,723.	5,723.	5,723.	
TOTAL	$ 5,861.	$ 5,861.	$ 5,861.	$ 0.

STATEMENT 4
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE OF MINNESOTA	$ 25.	$ 25.	$ 25.	
U S TREASURY	159.	159.	159.	
TOTAL	$ 184.	$ 184.	$ 184.	$ 0.

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

CASH GRANTS AND ALLOCATIONS

CLASS OF ACTIVITY:
DONEE'S NAME: SCHEDULES ATTACHED
DONEE'S ADDRESS: ATTACHED
ATTACHED,

RELATIONSHIP OF DONEE:
ORGANIZATIONAL STATUS OF DONEE:
AMOUNT GIVEN: $ 158,283.

TOTAL $ 158,283.

STATEMENT 6
FORM 990-PF, PART II, LINE 15
OTHER ASSETS

	BOOK VALUE	FAIR MARKET VALUE
ROUNDING	$ 2.	
TOTAL	$ 2.	$ 0.

STATEMENT 7
FORM 990-PF, PART III, LINE 5
OTHER DECREASES

ROUNDING	$ 1.
TOTAL	$ 1.

STATEMENT 8
FORM 990-PF, PART VII-A, LINE 10
SUBSTANTIAL CONTRIBUTORS DURING THE TAX YEAR

NAME OF SUBSTANTIAL CONTRIBUTOR	ADDRESS OF SUBSTANTIAL CONTRIBUTOR
SHIRLEY BARATZ	600 SOUTH HY 169 #701 MINNEAPOLIS, MN 55426

STATEMENT 9
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:
NAME: STAN BARATZ
CARE OF:
STREET ADDRESS: 600 SOUTH HWY 169 #701
CITY, STATE, ZIP CODE: MINNEAPOLIS, MN 55426

STATEMENT 9 (CONTINUED)
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

TELEPHONE:	
FORM AND CONTENT:	LETTER SETTING FORTH PURPOSE OF GRANT AND AMOUNT NEEDED
SUBMISSION DEADLINES:	NONE
RESTRICTIONS ON AWARDS:	NONE

BARATZ FOUNDDATION PART X FORM 990 - PF

	ZB	SB	TOTAL
STOCK			
JANUARY	42800	103262	146062
FEBRUARY	31030	130118	161148
MARCH	35310	154264	189574
APRIL	43450	252668	296118
MAY	45440	268451	313891
JUNE	43360	265099	308459
JULY	47830	275953	323783
AUGUST	47030	269987	317017
SEPTEMBER	52340	278271	330611
OCTOBER	45830	217441	263271
NOVEMBER	47550	219295	266845
DECEMBER	47090	218733	265823
TOTAL			3182602
AVERAGE			265216.8
CASH			
JANUARY	-6803	104753	97950
FEBRUARY	3166	144980	148146
MARCH	3166	124731	127897
APRIL	3787	46648	50435
MAY	4487	35928	40415
JUNE	3554	16204	19758
JULY	3654	12742	16396
AUGUST	2578	11067	13645
SEPTEMBER	2578	14806	17384
OCTOBER	2778	55947	58725
NOVEMBER	68247	46571	114818
DECEMBER	32908	2853	35761
TOTAL			741330
AVERAGE			61777.5

STAN BARATZ 2009 DONATIONS – Paid from Baratz Family Foundation

DATE ISSUED	*PAYEE*	DATE CLEARE D	AMOUNT	DED. AMT
12/3/08	ALS Association c/o Howard Zack 5045 Green Farms Rd Edina, MN 55436	#1896 JAN	$100.00	$100.00
12/3/08	Free Arts Minnesota 400 1st Ave N, Ste 518 Minneapolis, MN 55401	#1905 JAN	$500.00	$500.00
12/4/08	The Jerusalem Kollel PO 36002 Jerusalem, Israel	#1920 JAN	$250.00	$250.00
10/13/08	NCSA C/o Leslie Coopersmith 10324 Chatsworth Way Boca Raton, FL 33498-6420	#1921 JAN	$100.00	$100.00
3/20/09	Torah Academy 2800 Joppa Ave S St. Louis Park, MN 55416	#1922 MAR	$200.00	$200.00
3/20/09	Baseline Club, Inc 312 Central Ave SE, Ste 417 Minneapolis, MN 55414	#1924 MAR	$100.00	$100.00
3/20/09	Lance Armstrong Foundation c/o Joshua Fogelson Minneapolis Jewish Federation 131 Wayzata Blvd, Ste 200 Minnetonka, Mn 55305	#1926 APR	$100.00	$100.00
3/20/09	Gentlemens Night Out c/o Christensen Group 11100 Bren Road West Minnetonka, Mn 55343	#1927 APR	$300.00	$250.00
3/20/09	Minneapolis Jewish Federation 13100 Wayzata Blvd, Ste 200 Minnetonka, MN 55305	#1928 MAR	$70.00	$70.00
3/20/09	Gillette Children's Foundation 200 university Ave E St. Paul, MN 55101	#1929 MAR	$50.00	$50.00
3/20/09	Reach for Resources, Inc. 1001 Hwy 7, Room 217 Hopkins, MN 55305	#1930 MAR	$100.00	$100.00
4/14/09	Alzheimer's Association 4550 W. 77th St., Ste 200 Minneapolis, MN 55435	#1932 APR	$750.00	$600.00
4/14/09	Pacer Center 8161 Normandale Blvd. Minneapolis, MN 55437-1044	#1933 APR	$150.00	$150.00

4/14/09	Talmud Torah Academy 2800 Joppa Avenue South St. Louis Park, MN 55416	#1934 APR	$200.00	$200.00
4/14/09	Sabes JCC 4330 S. Cedar Lake Rd Minneapolis, MN 55416	#1935 APR	$100.00	$100.00
4/28/09	American Brain Tumor Assoc. Humor to fight the Tumor 16404 Eagle Ridge Drive Minnetonka, MN 55345	#1936 JUN	$75.00	$75.00
4/28/09	Cystic Fibrosis Foundation c/o Jon Bader Behringer Harvard 15601 Dallas Parkway, Ste 600 Addison, TX 75001	#1937 AUG	$75.00	$75.00
4/28/09	Minneapolis Jewish Day School 4330 Cedar Lake Road Minneapolis, Mn 55416	#1938 MAY	$500.00	$500.00
4/28/09	Living Legacy 2845 Hedberg Drive Minnetonka, Mn 55305	#1939 MAY	$1200.00	$1140.00
4/28/09	Baby's Space 2438 18th Ave S Minneapolis, MN 55404	#1940 MAY	$150.00	$150.00
4/28/09	Muscular Dystrophy Association 3300 E. Sunrise Drive Tucson, AZ 85718	#1941 MAY	$50.00	$50.00
4/28/09	MicroGrants 1035 E. Frankliln Ave Minneapolis, MN 55404	#1943 MAY	$100.00	$100.00
4/28/09	MS Society c/o Marcia Jaffee Koester 5601 Bernard Place Edina, MN 55436	#1944 MAY	$75.00	$75.00
4/28/09	Herzl Camp 7204 W. 27th Street, Ste 226 St. Louis Park, MN 55426	#1945 MAY	$250.00	$250.00
4/28/09	Wayzata Fire Department 600 Rice Street Wayzata, MN 55391	#1946 MAY	$25.00	$25.00
4/28/09	Sholom Community Alliance 3620 Phillips Parkway St. Louis Park, MN 55426	#1947 MAY	$75.00	$75.00
4/28/09	Northern Star Council Boy Scouts of America 393 Marshall Ave St. Paul, MN 55102-1717	#1948 MAY	$150.00	$150.00

4/28/09	B'nai Emet Synagogue 3115 Ottawa Ave S St. Louis Park, Mn 55416-2296	#1949 MAY	$25.00	$25.00
4/28/09	Science Museum of Minnesota 120 Kellogg Blvd. W. St. Paul, MN 55102-1202	#1950 MAY	$75.00	$75.00
4/28/09	Friends of Israel Scouts, Inc. 3306 Gettysburg Ave N New Hope, MN 55427	#1951 MAY	$75.00	$75.00
4/28/09	UNICEF 125 Maiden Lane New York, NY 10038	#1952 MAY	$50.00	$50.00
5/18/09	Summit Academy OIC 935 Olson Memorial Hwy Minneapolis, MN 55405	#1953 MAY	$1000.00	$1000.00
5/18/09	Susan G Komen Twin Cities Race for the Cure c/o Richard Proman 3446 Oakton Drive Minnetonka, MN 55305	#1954 MAY	$100.00	$100.00
5/18/09	Children's Cancer Research Fund 7801 E. Bush Lake Rd, Ste 130 Minneapolis, MN 55439	#1955 MAY	$250.00	$250.00
5/18.09	Hadassah c/o Debby Wolk Fall Chai Campaign 5109 James Ave S Minneapolis, MN 55419	#1956 JUN	$180.00	$180.00
5/18/09	Adath Jeshurn Congregation c/o Nancy Schachtman 2121 Austrian Pine Ln Minnetonka, MN 55305	#1958 MAY	$190.00	$190.00
5/18/09	Charity Golf Tournament 3630 Oakton Ridge Minnetonka, MN 55305	#1959 MAY	$300.00	$200.00
5/18/09	The Saint Paul Chamber Orchestra 408 St Peter Street St Paul, MN 55102-1497	#1960 MAY	$100.00	$100.00
5/18/09	B'nai Emet Synagogue 3115 Ottawa Ave S St. Louis Park, MN 55416-2296	#1961 MAY	$85.00	$85.00
5/18/09	Israel Children's Center 3275 West Hillsboro Blvd, Ste 102 Deerfield Beach, FL 33442	#1962 MAY	$180.00	$180.00
5/18/09	JFCS 13100 Wayzata Blvd, Ste 400 Minnetonka, MN 55305	#1963 MAY	$200.00	$200.00
5/18/09	Smile Train 41 Madison Ave, 28th Floor New York, NY 10010	#1964 MAY	$50.00	$50.00

5/18/09	American University 4400 Massachusetts Ave NW Washington, DC 20016-8022	#1965 JUN	$75.00	$75.00
5/18/09	Mary McDowell Center for Learning 20 Bergen Street Brooklyn NY 11201	#1966 MAY	$100.00	$100.00
06/19/2009	Birthright Israel Foundation P O Box 1784 New York, NY 10156	#1967 JUN	$200.00	$200.00
6/19/09	Americans United 518 C Street, NE Washington, DC 20002	#1968 JUN	$50.00	$50.00
6/19/09	Sholom Foundation 3610 Phillips Parkway Minneapolis, MN 55426-9966	#1969 JUL	$250.00	$250.00
6/19/09	Jewish Community Relations Council 12 N 12th Street, Ste 480 Minneapolis, MN 55403	#1970 JUL	$1250.00	$1250.00
6/19/09	Bolder Options 2100 Stevens Ave Minneapolis, MN 55404	#1971 JUN	$400.00	$400.00 ACH
6/19/09	Stages Theatre Company 1111 Mainstreet Hopkins, MN 55343	#1972 JUL	$200.00	$200.00
6/19/09	JDRF 2626 E. 82nd Street, Ste 225 Bloomington, MN 55425	#1973 JUN	$25000.00	$25000.00
6/19/09	David Foley Memorial Fund c/o Daniel Foley Americana Community Bank 9495 Black Oaks Lane N Maple Grove, MN 55311	#1974 JUN	$100.00	$100.00
6/19/09	AISH Minnesota 2609 Quentin Ave S Minneapolis, MN 55416	#1975 JUN	$2500.00	$2500.00
6/19/09	Breast Cancer 3 Day 205 N Michigan Ave, Suite 2640 Chicago, IL 60601	#1976 JUN	$100.00	$100.00
7/2/09	NECHAMA 4330 Cedar Lake Rd South St. Louis Park, MN 55416	#1977 JUL	$1200.00	$1200.00
7/2/09	Adath Jeshurun Congregation 10500 Hillside Lane West Minnetonka, MN 55305	#1978 JUL	$3049.00	$3049.00
7/2/09	LHS Foundation P O Box 13290 Denver, CO 80201	#1979 JUL	$100.00	$100.00

7/2/09	100MileMan Foundation c/o Jordan Bazant The Agency 230 Park Ave, Suite 851 New York, NY 10169	#1980 JUL	$100.00	$100.00
7/2/09	The Jerusalem Kollel POB 36002 Jerusalem, Israel	#1981 JUL	$500.00	$500.00
7/2/09	Courage Center 3915 Golden Valley Rd Minneapolis, MN 55422	#1982 JUL	$50.00	$50.00
7/2/09	Southern Poverty Law 400 Washington Ave Montgomery, IL 36104	#1983 JUL	$50.00	$50.00
7/6/09	Baseline Club 312 Central Ave. SSE, #417 Minneapolis, MN 55414	#1984 JUL	$300.00	$300.00
7/9/09	Catholic Relief Services 228 W. Lexington Street Baltimore, MD 21201	#1987 JUL	$20.00	$20.00
08/05/09	Charity Golf Tournament 3630 Oakton Ridge Minnetonka, MN 55305	#1988 AUG	$360.00	$360.00
08/11/09	Minnesotans Against Terrorism Att: Ilan Sharon P O Box 368 Hopkins, MN 55343	#1989 AUG	$500.00	$500.00
8/11/09	Peace House Africa 6581 City West Parkway Eden Prairie, MN 55344	#1990 AUG	$100.00	$100.00
8/11/09	Kids First 800 Nicollet Mall, Ste 2680 Minneapolis, MN 55402	#1991 AUG	$2500.00	$2500.00
8/11/09	Diana Chazin Levitt Memorial Fund 4301 Hwy 7, Ste 115 St. Louis Park, MN 55416	#1992 AUG	$75.00	$75.00
8/11/09	The Caring Tree 8120 Penn Ave S, Ste 464 Bloomington, MN 55431	#1993 AUG	$50.00	$50.00
8/11/09	MORE c/0 Jane & Bob Ketroser 10970 1st Ave N Plymouth, MN 55441	#1994 AUG	$1000.00	$1000.00 ACH
8/11/09	ALS TDI c/o Shelli & Michael Smith 1823 Valley Curve Mendota Heights, MN 55118	#1995 SEPT	$100.00	$100.00

8/11/09	B'nai Emet Synagogue 3115 Ottawa Ave S St. Louis Park, MN 55416	#1996 AUG	$500.00	$500.00	
8/11/09	Create A Memory Foundation c/o Ron Zamansky 80 S 8th Street, Ste 3901 Minneapolis, MN 55402	#1997 AUG	$150.00	$150.00	
8/11/09	Sabes JCC 4330 S. Cedar Lake Rd Minneapolis, MN 55416	#1998 AUG	$100.00	$100.00	
8/11/09	JFCS 13100 Wayzata Blvd, Ste 400 Minnetonka, MN 55305	#1999 AUG	$200.00	$200.00	Ack
8/11/09	Page Education Foundation P O Box 581254 Minneapolis, MN 55458-1254	#2001 AUG	$50.00	$50.00	
8/11/09	Southern Poverty Law Center 400 Washington Ave Montgomery, AL 36104	#2002 AUG	$50.00	$50.00	
9/25/09	Sholom Home Auxiliary 3610 Phillips Parkway St. Louis Park, MN 55426	#2003 OCT	$600.00	$500.00	
9/25/09	Boys & Girls Clubs c/o Boyd Stofer Marquette Real Estate Group 3500 American Blvd West, Ste 200 Bloomington, Mn 55431	#2004 OCT	$300.00	$300.00	
9/25/09	World Without Genocide 7220 Cornelia Drive Edina, MN 55435	#2005 OCT	$50.00	$50.00	
9/25/09	JAC P O Box 105 Highland Park, IL 60035	#2006 OCT	$150.00	$150.00	
9/25/09	STEP 5925 Highway 7 St. Louis Park, MN 55416	#2007 OCT	$150.00	$150.00	
9/25/09	Children's Heartlink 5075 Arcadia Ave Minneapolis, MN 55426-2306	#2008 OCT	$250.00	$250.00	
9/25/09	The Abraham Fund Initiatives 120 Broadway New York, NY 10271	#2009 OCT	$100.00	$100.00	
9/25/09	Interfaith Alliance 1212 New York Ave NW, Ste 1250 Washington, DC 20005-4706	#2010 OCT	$100.00	$100.00	
9/25/09	American Friends of Magen David Adom 3175 Commercial Ave, Ste 101 Northbrook, IL 60062	#2011 OCT	$75.00	$75.00	

9/25/09	Twin Cities Public Television (TPT) 172 East 4th Street St Paul, MN 55101	#2012 OCT	$100.00	$100.00
9/25/09	UCSJ P O Box 11676 Cleveland Park Washington, DC 20008	#2013 OCT	$150.00	$150.00
9/25/09	Cornerstone 1000 East 80th Street Bloomington, MN 55420	#2014 OCT	$300.00	$300.00
9/25/09	Humor to Fight the Tumor 2584 Christian Parkway Chaska, MN 55318	#2015 OCT	$100.00	$100.00
9/25/09	The Israel Project 2020 K Street, NW, Ste 7600 Washington, DC 20006-1828	#2016 OCT	$400.00	$400.00
9/25/09	Bridging 201 W. 87th Street Bloomington, MN 55420	#2017 SEPT	$125.00	$125.00
9/25/09	AICCMN 12 N 12th Street, Ste 480 Minneapolis, MN 55403	#2018 NOV	$150.00	$150.00
9/25/09	PAN Can 4000 W. 25th Street Minneapolis, MN 55416	#2019 NOV	$500.00	$500.00
10/8/09	ADL 605 3rd Ave New York, NY 10158-3560	#2021 OCT	$9000.00	$9000.00
10/23/09	Children's Foundation 2910 Center Pointe Drive Roseville, MN 55113-1182	#2022 OCT	$100.00	$100.00
11/18/09	B'nai Emet Synagogue 3115 Ottawa Ave S St. Louis Park, MN 55416	#2023 DEC	$250.00	$250.00
11/18/09	Jewish Community Action (JAC) 2375 University Ave W, Ste 150 St Paul, MN 55114-1633	#2024 NOV	$1800.00	$1800.00
11/18/09	Sholom Community Alliance 3620 Phillips Parkway St. Louis Park, MN 55426	#2025 NOV	$150.00	$150.00
11/18/09	Evans Scholarship Foundation 1 Briar Road Golf, IL 60029-0301	#2026 NOV	$100.00	$100.00
11/18/09	Adath Jeshurun Congregation 10500 Hillside Lane West Minnetonka, MN 55305	#2027 NOV	$2000.00	$2000.00
11/18/09	Israel Bridge P O Box 12411 La Jolla, CA 92039	#2028 DEC	$500.00	$500.00

11/18/09	JFCS 13100 Wayzata Blvd, Ste 400 Minnetonka, MN 55305	#2029 NOV	$1000.00	$1000.00
11/18/09	Jewish National Fund 42 East 69th Street New York, NY 10021-5093	#2030 NOV	$6000.00	$6000.00
11/18/09	Minnesota Landscape Arboretum 3675 Arboretum Drive Chaska, MN 55318-9613	#2031 NOV	$100.00	$100.00
11/18/09	Free Arts Minnesota 400 First Ave North, Ste 518 Minneapolis, MN 55401	#2032 DEC	$300.00	$300.00
11/18/09	Jewish Historical Society 4330 S. Cedar Lake Rd Minneapolis, MN 55416-3798	#2034 NOV	$50.00	$50.00
11/18/09	Dress for Success 13033 Ridgedale Drive, Box 143 Minnetonka, MN 55305	#2035 DEC	$100.00	$100.00
11/18/09	Friends of Yad LaKashish P O Box 494 Englewood, NJ 07631	#2036 NOV	$100.00	$100.00
11/22/09	Under the Radar Foundation c/o Hunter Advisors, PLLC 7900 Xerxes Ave, Suite 1200 Minneapolis, MN 55431	#2037 NOV	$450.00	$450.00
12/18/09	Minneapolis Jewish Federation 13100 Wayzata Blvd, Ste 200 Minneapolis, MN 55305-1810	#2038 DEC	$43000.00	$43000.00
12/18/09	CommonBond Communities 328 Kellogg Blvd W St Paul, MN 55102	#2040 DEC	$1000.00	$1000.00
12/18/09	MnTeen Challenge 1619 Partland Ave S Minneapolis, MN 55404	#2041 DEC	$100.00	$100.00
12/18/09	Sister Kenny Foundation Mail Route 16509 800 East 28th Street Minneapolis, MN 55407-3798	#2042 DEC	$50.00	$50.00
12/18/09	Minneapolis Parks Foundation 3954 Bryant Ave S Minneapolis, MN 55409	#2043 DEC	$100.00	$100.00
12/18/09	HIAS 333 Seventh Ave New York, NY 10001-5019	#2044 DEC	$500.00	$500.00
12/18/09	Hope for the City 4350 Baker Road, Ste 400 Minnetonka, MN 55343	#2045 DEC	$500.00	$500.00

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12/21/09	Baseline Club 312 Central Ave SE, Ste 417 Minneapolis, MN 55414	#2047 DEC	$100.00	$100.00
12/21/09	BestPrep Birdies for BestPrep 7100 Northland Circle N, Ste 402 Brooklyn Park, MN 55428	#2049 DEC	$50.00	$50.00
TOTAL:			$120984.00	$120524.00

	BARATZ FOUNDATION 2009 - ZB	
CHECK #		CONT
2621	ARTHRITIS FOUNDATION	$ 30.00
2716	METRO MEALS ON WHEELS	$ 50.00
2718	NAT CNCL JEWISH WOMEN	$ 100.00
2723	FRATERNAL ORDER OF POLICE	$ 20.00
2727	CHILDRENS FOUNDATION	$ 50.00
2751	MPLS JEWISH FEDERATION	$ 7,200.00
2753	BNAI EMET SYNAGOGUE	$ 16,056.00
2754	AM FRIENDS OF HEB UNIV	$ 100.00
2755	AMERICAN HEART ASSN	$ 30.00
2756	RED CROSS	$ 75.00
2757	ARTHRITIS FOUNDATION	$ 25.00
2758	BBYO	$ 100.00
2759	BOYS TOWN	$ 24.00
2760	EPILEPSY FOUNDATION'	$ 57.00
2761	JOINT ACTION COMMITTEE	$ 150.00
2762	LEUKEMIA SOCIETY	$ 25.00
2763	MADD	$ 50.00
2764	MN PUBLIC RADIO	$ 100.00
2765	NAACP	$ 50.00
2766	PARKINSONS	$ 35.00
2767	SECOND HARVEST	$ 75.00
2768	TOYS FOR TOTS	$ 25.00
2769	US HOLOCOUST MUSEUM	$ 50.00
2770	SIMON WIESENTHAL CENTER	$ 60.00
2771	VFW	$ 10.00
2772	WXEL	$ 45.00
2773	TEMPLE EMANUEL	$ 100.00
2777	MACAVI SPORTS ISRAEL	$ 18.00
2778	LATINO ECONOMIC DEVEL	$ 25.00
2779	SIMON WIESENTHOL CENTER	$ 50.00
2780	AM FRIENDS OF HEBREW UNIV	$ 100.00
2782	SAVE THE CHILDREN	$ 24.00
2783	PAULA RUDE	
2784	SHOLOM FOUNATION	$ 1,250.00
2785	TRANSAMERICA LIFE	
2786	FRIENDS OF ISRAEL SCOUNTS	$ 100.00
2787	PERRON EWALD	
2788	LEONARD STREET	
2789	LEONARD STREET	
2790	BWOIENET SYNAGOGUE	$ 500.00
2791	PERRON EWALD	
2792	PERRON EWALD	

2794	WOMENS ENDOWMENT	$ 500.00
2795	PAN CAN	$ 500.00
2797	JEWISH NATIONAL FOUND	$ 1,000.00
2798	JUVEINILE DIABETES	$ 1,500.00
2800	JEWISH FED OF PALM BEACH	$ 7,500.00
	TOTAL	$ 37,759.00

Vendor	Address	City, State Zip
American Friends of Hebrew University	PO Box 2045	New York, NY 10021-0051
American Heart Association	PO Box 78851	Phoenix, AZ 85062-8851
American Red Cross	PO 9430	Minneapolis, MN 55440-9430
Anti Defamation League	PO Box 96266	Washington, DC 20090-6226
Arthritis Foundation	PO Box 581998	Minneapolis, MN 55458-1998
Bnai Brith Youth Organization	PO Box 19006	Washington, DN 20036
Bnai Emet Synagogue	3115 Ottawa Avenue South	Saint Louis Park, MN 55416
Boys Town	100 Flanagan Blvd, PO Box 5000	Boys Town, NE 68010-9989
Chilcren's Hospital Fund		
Epilepsy Foundation	PO Box 96546	Washington, DC 20077-7222
Friends of Israel Scouts	30 Western Terrace	Golden Valley, MN 55426
Habit for Humanity	121 Habitat St.	Americus, GA 31709-3498
Herzl Camp	7204 W. 27th Street, Suite 226	Saint Louis Park, MN 55426
Hillel College	PO Box 92994	Washington, DC 20090-2994
The Israel Bridge	8975 Costa Verde Blvd #402	San Diego, CA 92122
J F C S	13100 Wayzata Blvd, Suite 400	Minneapolis, MN 55416
Jewish National Fund	78 Randall Ave	Rockville Center, NY 11570-3946
Jewish Federation of Palm Beach	4601 Community Drive	West Palm Beach, FL 33401
Jewish Theological Seminary	3080 Broadway	New York, NY 10027
Joint Action Committee	PO Box 105	Highland Park, IL 60035
Juvenile Diabetes Research	2626 E. 82nd St, Suite 225	Bloomington, MN 55425
Leukemia & Lymphoma Society	PO 9031	Pittsfield, MA 01202-9031
MADD - Mothers Against Drunk Driving	PO Box 4002886	Des Moines, IA 50340-2886
MN Public Radio	CM-9787 PO Box 70870	Saint Paul, MN 55170-9787
Mpls Jewish Fed	13100 Wayzata Blvd, Suite 200	Minneapolis, MN 55416-2186
NAACP		Baltimore, MD 21227-9908
Naral Pro Choice	Po Box 1866	Merrifield,VA 22116-8066
Pan Can (Pancreatic Cancer)	2141 Rosecrans Ave. #7000	El Segundo, CA 90245
Parkinson's Disease Foundation		New York, NY
Second Harvest	1140 Gervais Ave	Saint Paul, MN 55109
Sholom Community Alliance	3620 Phillips Parkway South	Saint Louis Park, MN 55426
Sholom Home Auxiliary	3620 Phillips Parkway South	Saint Louis Park, MN 55426
Simon Wiesenthal Center	1399 Roxbury Dr, Ste 100	Los Angeles, CA 90035-9003
Temple Emanu-El	190 N. County Road	Palm Beach, FL 33480-2180
Toys for Tots-Marines Foundation	Marine Corps Base, PO Box 227	Quantico, VA 22134=0227
[redacted]		Washington, DC
[redacted]		Washington, DC
Women's Endowment Fund	12100 Wayzata Blvd #200	Minnetonka, MN 55305
WXEL	PO Box 6607	West Palm Beach, FL 33405-6607
TOTAL FOUNDATION DONATIONS		