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

2009

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2009, or tax year beginning

, 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.

WEITZMAN FAMILY FOUNDATION, INC.  
3939 WASHINGTON BLVD  
BALTIMORE, MD 21227-4132

**A** Employer identification number

52-2061321

**B** Telephone number (see the instructions)

410-242-0400

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

H Check type of organization  Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundation

I Fair market value of all assets at end of year **J** Accounting method:  Cash  Accrual  
(from Part II, column (c), line 16)  Other (specify) \_\_\_\_\_

► \$ 288,309. (Part I, column (d) must be on cash basis)

<b>Part I Analysis of Revenue and Expenses</b> (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)
R E V E N U E	1 Contributions, gifts, grants, etc, received (att sch.)	60,000.			
	2 Ck ► <input type="checkbox"/> if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	8,186.	8,186.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10	-92,519.			
	b Gross sales price for all assets on line 6a 156,642.				
	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				
A D M I N I S T R A T I V E O P E R A T I N G A N D E X P E N S E S	b Less Cost of goods sold				
	c Gross profit/(loss) (att sch)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	-24,333.	8,186.	0.	
	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch) SEE STM 1	1,375.	1,375.		
	c Other prof fees (attach sch) SEE STM 2	2,124.	2,124.		
	17 Interest				
	18 Taxes (attach schedule) SEE STM 3	718.	124.		
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	443.			443.
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23.	4,660.	3,623.		443.
	25 Contributions, gifts, grants paid PART XV	75,900.			75,900.
	26 Total expenses and disbursements. Add lines 24 and 25	80,560.	3,623.	0.	76,343.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-104,893.			
	b Net investment income (if negative, enter -0-)		4,563.		
	c Adjusted net income (if negative, enter -0-)			0.	

<b>Part II</b> <b>Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	<b>Beginning of year</b>	<b>End of year</b>
			<b>(a) Book Value</b>	<b>(b) Book Value</b>
<b>ASSETS</b>	1	7,921.	22,650.	22,650.
	2			
	3			
	4			
	5			
	6			
	7			
	8			
	9			
	10a			
	b	366,174.	246,552.	265,659.
	c			
	11			
	12			
	13			
	14			
15				
16	374,095.	269,202.	288,309.	
<b>LIABILITIES</b>	17			
	18			
	19			
	20			
	21			
	22			
	23	0.	0.	
<b>NET ASSETS</b>	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.	<input checked="" type="checkbox"/>		
	24	374,095.	269,202.	
	25			
	26			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.	<input type="checkbox"/>		
	27			
	28			
	29			
	30	374,095.	269,202.	
	31	374,095.	269,202.	

**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	374,095.
2	Enter amount from Part I, line 27a	2	-104,893.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	269,202.
5	Decreases not included in line 2 (itemize)	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	269,202.

**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)
1 a 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) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))		
(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			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss). <span style="border: 1px solid black; padding: 2px;">If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</span>			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	65,080.	355,925.	0.182848
2007	74,118.	360,194.	0.205772
2006	84,910.	321,239.	0.264320
2005	59,570.	266,658.	0.223395
2004	63,278.	292,512.	0.216326

2 Total of line 1, column (d)	2	1.092661
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	0.218532
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	283,986.
5 Multiply line 4 by line 3	5	62,060.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	46.
7 Add lines 5 and 6	7	62,106.
8 Enter qualifying distributions from Part XII, line 4	8	76,343.

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 ► <input type="checkbox"/> and enter 'N/A' on line 1.	1	46.
• Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instr.)	2	0.
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	3	46.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)	4	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	5	46.
3 Add lines 1 and 2.		
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-		
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	46.
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d	7	46.
8 Enter any <b>penalty</b> 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	0.
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**

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?

	Yes	No
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	X
---	---

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

3	X
---	---

If 'Yes,' attach a detailed description of the activities

4a	X
----	---

4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4b	N/A
----	-----

b If 'Yes,' has it filed a tax return on Form 990-T for this year?

5	X
---	---

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

6	X
---	---

7	X
---	---

If 'Yes,' attach the statement required by General Instruction T

8a	
----	--

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:

8b	X
----	---

9	X
---	---

10	X
----	---

• 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?

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

8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) ►

MD

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

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

10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses

**Part VII-A Statements Regarding Activities Continued**

11		X
12		X
13	X	
14	STUART WEITZMAN	Telephone no. ► 410-242-0400
	Located at ► 3939 WASHINGTON BLVD BALTIMORE MD	ZIP + 4 ► 21227
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 ► 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
1b	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)? Organizations relying on a current notice regarding disaster assistance check here ►		N/A
1c	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?		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 ► 20__ , 20__ , 20__ , 20__ .	<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 the instructions) ..		
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__ .		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If 'Yes,' did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009) .		
3b			N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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

BAA

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)? (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)?

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?

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
EVELYN WEITZMAN 4015 W PALM AIRE DR POMPANO BEACH, FL 33069	PRESIDENT 2.00	0.	0.	0.
RONALD WEITZMAN 901 E. CAMINO REAL BOCA RATON, FL 33432	VICE PRESIDE 2.00	0.	0.	0.
LINDA COHEN 17 CLUBHOUSE LANE BOYNTON BEACH, FL 33436	SECRETARY 2.00	0.	0.	0.
STUART WEITZMAN 8423 EGRET MEADOW LN WEST PALM BEACH, FL 33412	TREASURER 2.00	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		

## 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.

Organizations and other beneficiaries served, conferences convened, research papers produced, etc.	
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

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.**

**Total. Add lines 1 through 3 .**

**BAA**

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**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	265,660.
b Average of monthly cash balances	1b	22,651.
c Fair market value of all other assets (see instructions)	1c	
<b>d Total</b> (add lines 1a, b, and c)	<b>1d</b>	<b>288,311.</b>
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	288,311.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	4,325.
<b>5 Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	283,986.
<b>6 Minimum investment return.</b> Enter 5% of line 5	6	14,199.

**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	14,199.
2a Tax on investment income for 2009 from Part VI, line 5	2a	46.
b Income tax for 2009. (This does not include the tax from Part VI)	2b	
c Add lines 2a and 2b	2c	46.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	14,153.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	14,153.
6 Deduction from distributable amount (see instructions)	6	
<b>7 Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	14,153.

**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	76,343.
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:	3a	
a Suitability test (prior IRS approval required)	3b	
b Cash distribution test (attach the required schedule)	4	76,343.
<b>4 Qualifying distributions</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	5	46.
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)	6	76,297.
<b>6 Adjusted qualifying distributions.</b> Subtract line 5 from line 4		

**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				14,153.
2 Undistributed income, if any, as of the end of 2009:			0.	
a Enter amount for 2008 only		0.		
b Total for prior years: 20____, 20____				
3 Excess distributions carryover, if any, to 2009:				
a From 2004 . . . . . 48,850.				
b From 2005 . . . . . 46,498.				
c From 2006 . . . . . 69,130.				
d From 2007 . . . . . 56,448.				
e From 2008 . . . . . 47,509.				
f Total of lines 3a through e . . . . . 268,435.				
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 76,343.			0.	
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				14,153.
e Remaining amount distributed out of corpus	62,190.			
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 . . . . . 330,625.				
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) . . . . . 48,850.				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a . . . . . 281,775.				
10 Analysis of line 9:				
a Excess from 2005 . . . . . 46,498.				
b Excess from 2006 . . . . . 69,130.				
c Excess from 2007 . . . . . 56,448.				
d Excess from 2008 . . . . . 47,509.				
e Excess from 2009 . . . . . 62,190.				

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

N/A

**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:

**EVELYN WEITZMAN**

EVELYN WEITZMAN

**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:

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

#### • Any submission deadlines

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i> SEE STATEMENT 4				
<b>Total</b>			► 3a	75,900.
<i>b Approved for future payment</i>				
<b>Total</b>			► 3b	

## Part XVI-A Analysis of Income-Producing Activities

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
<b>1 Program service revenue:</b>					
a					
b					
c					
d					
e					
f					
<b>g Fees and contracts from government agencies</b>					
<b>2 Membership dues and assessments</b>					
<b>3 Interest on savings and temporary cash investments</b>					
<b>4 Dividends and interest from securities</b>				14	8,186.
<b>5 Net rental income or (loss) from real estate:</b>					
a Debt-financed property					
b Not debt-financed property					
<b>6 Net rental income or (loss) from personal property</b>					
<b>7 Other investment income</b>					
<b>8 Gain or (loss) from sales of assets other than inventory</b>				18	-92,519.
<b>9 Net income or (loss) from special events</b>					
<b>10 Gross profit or (loss) from sales of inventory</b>					
<b>11 Other revenue:</b>					
a					
b					
c					
d					
e					
<b>12 Subtotal. Add columns (b), (d), and (e)</b>					-84,333.
<b>13 Total. Add line 12, columns (b), (d), and (e)</b>				13	-84,333.
(See worksheet in the instructions for line 13 to verify calculations )					

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



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

Department of the Treasury  
Internal Revenue Service

OMB No 1545-0047

**Schedule of Contributors**

► Attach to Form 990, 990-EZ, or 990-PF

**2009**

Name of the organization

WEITZMAN FAMILY FOUNDATION, INC.

Employer identification number

52-2061321

Organization type (check one):

Filers of:

Form 990 or 990-EZ

Section:

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)

**BAA** 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

WEITZMAN FAMILY FOUNDATION, INC.

Employer identification number

52-2061321

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	EVELYN WEITZMAN	\$ 60,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>
	4015 W PALM AIRE DR		(Complete Part II if there is a noncash contribution.)
	POMPANO BEACH, FL 33069		
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>
			(Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>
			(Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>
			(Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>
			(Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>
			(Complete Part II if there is a noncash contribution.)

Name of organization

WEITZMAN FAMILY FOUNDATION, INC.

Employer identification number

52-2061321

**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
	N/A	\$	
		\$	
		\$	
(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
		\$	

BAA

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**Name of organization**

WEITZMAN FAMILY FOUNDATION, INC.

**Employer identification number**

52-2061321

**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**

2009

## FEDERAL STATEMENTS

PAGE 1

WEITZMAN FAMILY FOUNDATION, INC.

52-2061321

**STATEMENT 1**  
**FORM 990-PF, PART I, LINE 16B**  
**ACCOUNTING FEES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES. ....	\$ 1,375.	\$ 1,375.	\$ 0.	\$ 0.
TOTAL	<u>\$ 1,375.</u>	<u>\$ 1,375.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

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

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	\$ 2,124.	\$ 2,124.	\$ 0.	\$ 0.
TOTAL	<u>\$ 2,124.</u>	<u>\$ 2,124.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

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

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX PAID	\$ 124.	\$ 124.		
OTHER TAXES	369.			
TAXES PAID FOR 2008	225.			
TOTAL	<u>\$ 718.</u>	<u>\$ 124.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

**STATEMENT 4**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
OHEB SHALOM 7310 PARK HEIGHTS AVENUE BALTIMORE, MD 21208		CHARITABLE		\$ 29,000.
UMMS 22 SOUTH GREEN STREET BALTIMORE, MD 21201		CHARITABLE		15,450.

WEITZMAN FAMILY FOUNDATION, INC.

52-2061321

**STATEMENT 4 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
JUVENILE DIABETES RESEARCH FOUNDATION 120 WALL STREET, 19TH FLOOR NEW YORK, NY 10005			CHARITABLE	\$ 100.
BETHESDA HOSPITAL FOUNDATION 2815 SOUTH SEACREST BLVD BOYNTON BEACH, FL 33435			CHARITABLE	200.
NATIONAL MULTIPLE SCLEROSIS SOCIETY 11403 CRONHILL DR., STE. E OWINGS MILLS, MD 21117			CHARITABLE	250.
IBIS CANCER RESEARCH 1192 E NEWPORT CENTER DRIVE DEERFIELD BEACH, FL 33442			CHARITABLE	260.
ISRAEL CHILDRENS CENTER 3275 W HILLSBORO DEERFIELD BEACH, FL 33442			CHARITABLE	250.
JEWISH MUSEUM OF MARYLAND 15 LLOYD STREET BALTIMORE, MD 21202			CHARITABLE	2,650.
GREEN VALLEY NORTH TURKEY TROT, INC. P.O.BOX 50304 BALTIMORE, MD 21211			CHARITABLE	250.
JEWISH FEDERATION 6101 MONTROSE RD ROCKVILLE, MD 20852			CHARITABLE	775.
SUSAN G KOMEN 5005 LBJ FREEWAYSUITE 250 DALLAS, TX 75244			CHARITABLE	200.
HUNTERS DREAM FOR A CURE 1601 PELICAN LAKES POINT STE 201 WINDSOR, CO 80550			CHARITABLE	650.
ALZHEIMER'S ASSOCIATION 1850 YORK ROAD STE D TIMONIUM, MD 21093			CHARITABLE	200.

WEITZMAN FAMILY FOUNDATION, INC.

52-2061321

**STATEMENT 4 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
CHESAPEAKE BAY MARITIME 213 N. TALBOT STREET P.O.BOX 636 ST. MICHAELS, MD 21663			CHARITABLE	\$ 100.
BZD 3655B OLD COURT ROAD STE 24 PIKESVILLE, MD 21208			CHARITABLE	5,000.
MILDRED MIDELL CENTER 3939 WASHINGTON BLVD BALTIMORE, MD 21227			CHARITABLE	120.
KID SANCTUARY 350 SOUTH COUNTY ROAD STE 208 PALM BEACH, FL 33480			CHARITABLE	145.
AIFCS 17 CLUBHOUSE LANE BOYNTON BEACH , FL 33436			CHARITABLE	100.
THE ASSOCIATED 101 W MT ROYAL AVENUE BALTIMORE, MD 21201			CHARITABLE	20,000.
UNIVERSITY MIAMI 1200 CAMPO SANO AVENUE MIAMI, FL 33146			CHARITABLE	200.
<b>TOTAL</b>				<b>\$ <u>75,900.</u></b>

## Details of Short Term Gain (Loss) 2009

This section shows your sales of securities during the year. The "Sale Proceeds" column excludes any accrued income you may have received. In addition, although cash in lieu less than \$20 is not included on Form 1099-B (if applicable), it is included in this section. Please note, this material is being prepared for informational purposes only and should not be used for tax preparation without the assistance of your tax advisor.

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Cost	(Loss)	Gain
1250000010	33.709	IVY ASSET STRATEGY FUND CLASS C	12/11/08	06/16/09	\$ 635.41	\$ 579.79	\$ 55.62	
	93.059	CONFIRM #500091680015827	12/11/08		1,754.17	1,600.61	153.56	
		ORIGINAL TRADE REJECT						
1250000020	9,343	PIMCO COMMODITY REAL RETURN	06/24/08	06/16/09	66.89	182.65	(115.76)	
	11.78	STRATEGY FD CL C	09/18/08		84.34	166.33	(81.99)	
	43,306	CONFIRM #500091670211832	12/10/08		310.05	247.71	62.34	
	261,514	8,389.49 LESS CONTG DEF	12/10/08		1,872.33	1,495.86	376.47	
	12,998		12/30/08		93.06	78.64	14.42	
	11,253		03/19/09		80.58	69.43	11.15	
		Total			\$ 4,896.83	\$ 4,421.02	(\$ 197.75)	\$ 673.56

## Details of Long Term Gain (Loss) 2009

This section shows your sales of securities during the year. The "Sale Proceeds" column excludes any accrued income you may have received. In addition, although cash in lieu less than \$20 is not included on Form 1099-B (if applicable), it is included in this section. Please note, this material is being prepared for informational purposes only and should not be used for tax preparation without the assistance of your tax advisor.

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Cost	(Loss)	Gain
1250000010	929.023	IVY ASSET STRATEGY FUND CLASS C	05/07/08	06/16/09	\$ 17,512.08	\$ 24,989.90	(\$ 7,477.82)	
		CONFIRM #500091680015827						
		ORIGINAL TRADE REJECT						
1250000020	813.397	PIMCO COMMODITY REAL RETURN	05/07/08	06/16/09	5,823.59	15,300.00	(9,476.41)	
		STRATEGY FD CL C						
		CONFIRM #500091670211832						
		8,389.49 LESS CONTG DEF						
1250000030	169,779	TEMPLETON GLOBAL BOND FUND CLASS C	05/11/07	06/16/09	2,000.00	1,938.88	61.12	
		CONFIRM #500091670212384						
		Total			\$ 25,335.67	\$ 42,228.78	(\$ 16,954.23)	\$ 61.12

Detail for line 6(a)(6):

Form 990 PF - Weitzman Family Foundation Inc  
# 52-2061321

2009



1

## Details of Short Term Gain (Loss) 2009

This section shows your sales of securities during the year. The "Sale Proceeds" column excludes any accrued income you may have received. In addition, although cash in lieu less than \$20 is not included on Form 1099-B (if applicable), it is included in this section. Please note, this material is being prepared for informational purposes only and should not be used for tax preparation without the assistance of your tax advisor.

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Cost	(Loss)	Gain
1250000010	3	ISHARES BARCLAYS TREAS INFLATION PROTECTED SECS FD	05/16/08 09/23/08	04/06/09	\$ 304.52 3,349.67	\$ 322.93 3,429.27	(\$ 18.41) (79.60)	
1250000020	120	ISHARES RUSSELL MIDCAP VALUE INDEX FD	04/14/08 05/16/08 09/19/08 09/22/08	03/02/09	2,581.02 906.86 1,295.51 398.65	5,252.00 2,007.60 2,615.49 758.65	(2,660.98) (1,100.74) (1,319.98) (370.00)	
	42							
	60							
	18							



②

# Morgan Stanley SmithBarney

Ref: 00001235 00032569

## Reserved Client Statement 2009 Year End Summary

Page 6 of 9

WEITZMAN FAMILY FOUNDATION INC  
Account Number 23J-07269-11 2XH

### Details of Short Term Gain (Loss) 2009 continued

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Cost	(Loss)	Gain
1250000030	36	ISHARES RUSSELL MIDCAP VALUE INDEX FD	04/06/09	08/21/09	\$ 1,198.33	\$ 908.23		\$ 290.10
		Morgan Stanley Sml th Barney LLC acted as yo						
1250000040	102	ISHARES RUSSELL MIDCAP GROWTH INDEX FD	04/14/08 05/16/08 09/19/08 09/22/08	03/02/09 1,020.30 510.15 402.75	2,738.69 2,185.50 914.88 707.75	5,279.34 2,165.20 (404.73) (305.00)		(2,540.65)
1250000050	24	ISHARES RUSSELL MIDCAP GROWTH INDEX FD	04/06/09	08/21/09	969.54	757.41		212.13
		Morgan Stanley Sml th Barney LLC acted as yo						
1250000090	72	ISHARES RUSSELL 1000 VALUE IND FUND	10/29/08	08/21/09	3,829.58	3,746.88		82.70
		Morgan Stanley Sml th Barney LLC acted as yo						
1250000130	28	ISHARES RUSSELL 1000 GROWTH INDEX FUND	09/22/08	08/21/09	1,240.37	1,439.11		(198.74)
		Morgan Stanley Sml th Barney LLC acted as yo						
1250000140	39	ISHARES TR RUSSELL 2000 VALUE INDEX FUND	04/14/08 05/16/08 09/19/08	03/02/09 744.89 532.06	1,383.37 1,469.12 1,096.80	2,570.89 (724.23) (564.74)		(1,187.52)
1250000150	37	ISHARES TR RUSSELL 2000 GROWTH INDEX FUND	04/14/08 05/16/08 09/19/08	03/02/09 862.28 821.22	1,519.26 1,680.00 1,574.65	2,716.27 (817.72) (753.43)		(1,197.01)
1250000160	75	ISHARES BARCLAYS SHORT TREAS BD FD	03/02/09 03/17/09	04/06/09 330.48	8,261.95 8,267.25 330.72 (24)	(5.30)		
1250000170	25	ISHARES BARCLAYS SHORT TREAS BD FD	03/02/09	08/21/09	2,754.42	2,755.75		(1.33)
		Morgan Stanley Sml th Barney LLC acted as yo						
1250000180	79	VANGUARD BD INDEX FD INC TOTAL BD MARKET ETF	09/24/08	02/25/09	6,060.84	6,090.90		(30.06)
1250000190	167	VANGUARD BD INDEX FD INC TOTAL BD MARKET ETF	09/24/08	04/06/09	12,811.21	12,875.70		(64.49)

(3)



# Morgan Stanley SmithBarney

Ref: 00001235 00032570

## Reserved Client Statement 2009 Year End Summary

Page 7 of 9

WEITZMAN FAMILY FOUNDATION INC  
Account Number 23J-07269-11 2XH

### Details of Short Term Gain (Loss) 2009 - continued

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Cost	(Loss)	Gain
1250000200	27	VANGUARD EMERGING MARKETS ETF	05/16/08 09/19/08 10/29/08	03/02/09	\$ 528.70 2,566.00 2,937.20	\$ 1,441.18 4,889.56 3,444.00	(\$ 912.48) (2,363.56) (506.80)	0 0 0
Total	129				\$ 62,818.82	\$ 81,527.83	(\$ 19,282.94)	\$ 584.93
	150							9

### Details of Long Term Gain (Loss) 2009

This section shows your sales of securities during the year. The "Sale Proceeds" column excludes any accrued income you may have received. In addition, although cash in lieu less than \$20 is not included on Form 1099-B (if applicable), it is included in this section. Please note, this material is being prepared for informational purposes only and should not be used for tax preparation without the assistance of your tax advisor.

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Cost	(Loss)	Gain
1250000200	69	ISHARES RUSSELL MIDCAP VALUE FUND	05/16/07 06/22/07 01/18/08	03/02/09	\$ 1,489.84 64.78 1,619.39	\$ 3,686.66 158.75 3,134.70	(\$ 2,196.82) (93.97) (1,515.31)	
125000040	120	ISHARES RUSSELL MIDCAP GROWTH FUND	05/16/07 01/18/08	03/02/09	3,221.99 1,684.70	6,749.65 3,094.90	(3,527.66) (1,430.20)	
125000060	150	ISHARES RUSSELL 1000 VALUE IND FUND	05/16/07	03/02/09	5,520.68	13,228.14	(7,707.46)	
125000070	21	ISHARES RUSSELL 1000 VALUE IND FUND	05/16/07	03/17/09	816.97	1,851.94	(1,034.97)	
125000080	52	ISHARES RUSSELL 1000 VALUE IND FUND	05/16/07 06/22/07 09/21/07 04/14/08	04/17/09	2,329.02 134.37 582.25 1,612.40	4,585.76 262.32 1,131.35 2,632.68	(2,256.74) (127.95) (549.10) (1,020.28)	
125000090	39	ISHARES RUSSELL 1000 VALUE IND FUND	04/14/08 05/16/08	08/21/09	2,074.36 2,872.18	2,852.07 4,229.59	(777.71) (1,357.41)	
125000100	191	ISHARES RUSSELL 1000 GROWTH INDEX FUND	05/16/07	03/02/09	6,086.06	11,241.97	(5,155.91)	
125000110	24	ISHARES RUSSELL 1000 GROWTH INDEX FUND	05/16/07	03/17/09	803.80	1,412.60	(608.80)	
125000120	9	ISHARES RUSSELL 1000 GROWTH INDEX FUND	05/16/07	04/17/09	341.97	529.73	(187.76)	



4

# Morgan Stanley SmithBarney

Ref: 00001235 00032571

## Reserved Client Statement 2009 Year End Summary

WEITZMAN FAMILY FOUNDATION INC  
Account Number 23J-07269-11 2XH

Page 8 of 9

### Details of Long Term Gain (Loss) 2009 - continued

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Cost	(Loss)	Gain
125000130	195	ISHARES RUSSELL 1000 GROWTH INDEX FUND	05/16/07 05/16/08	08/21/09	\$ 8,638.27 3,145.22	\$ 11,477.40 4,250.03	(\$ 2,839.13) (\$ 1,104.81)	0
125000140	48	ISHARES TR RUSSELL 2000 VALUE INDEX FUND	05/16/07 09/21/07 10/19/07 01/18/08	03/02/09	1,702.61 177.36 35.47 354.71	3,932.61 393.55 75.99 625.71	(2,230.00) (216.19) (40.52) (271.00)	2
125000150	91	ISHARES TR RUSSELL 2000 GROWTH INDEX FUND	05/16/07 01/18/08	03/02/09	3,736.55 369.55	7,495.56 662.47	(3,759.01) (292.92)	Y
125000200	304	VANGUARD EMERGING MARKETS ETF	05/16/07 01/18/08	03/02/09	5,952.74 2,545.58	13,044.73 6,171.56	(7,091.99) (3,625.98)	E
125000210	31	VANGUARD INTL EQUITY INDEX FD	05/16/07 01/18/08	03/02/09	1,039.41 603.53	2,158.75 1,120.68	(1,119.34) (517.15)	A
125000220	2	VANGUARD INTL EQUITY INDEX FD	01/18/08	03/17/09	69.89	124.52	(54.63)	R
125000230	1	VANGUARD INTL EQUITY INDEX FD	01/18/08	04/17/09	40.91	62.26	(21.35)	A
125000240	57	VANGUARD INTL EQUITY INDEX FD	05/16/07 VANGUARD EUROPEAN ETF	03/02/09	1,614.85	4,302.93	(2,688.08)	N
125000250	15	VANGUARD INTL EQUITY INDEX FD	05/16/07 VANGUARD EUROPEAN ETF	03/17/09	451.68	1,132.35	(680.67)	D
125000260	7	VANGUARD INTL EQUITY INDEX FD	05/16/07	04/17/09	243.87	528.43	(284.56)	S
125000270	35	VANGUARD INTL EQUITY INDEX FD	05/16/07 VANGUARD EUROPEAN ETF Morgan Stanley Sm th Barney LLC acted as yo	08/21/09	1,633.75	2,642.15	(1,008.40)	M
					\$ 63,590.71	\$ 120,984.49	(\$ 57,393.78)	A
					<u>PROCEEDS</u>	<u>COST</u>	<u>CHAIN/LOSS</u>	R
					\$ 67,716.65	\$ 85,948.85	(\$ 18,232.20)	Y
					\$ 88,925.35	\$ 163,214.15	(\$ 74,288.80)	E
					\$ 156,642.00	\$ 249,163.00	(\$ 92,521.00)	A
								5

TO TALS:  
S/T -  
L/T -



Application for Extension of Time To File an  
Exempt Organization Return

OMB No. 1545-1709

Department of the Treasury  
Internal Revenue Service

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box. ►
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

*Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868***Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension – check this box and complete Part I only. ► *All other corporations (including 1120-C filers), partnerships, REMICS, and trusts must use Form 7004 to request an extension of time to file income tax returns.*

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

Type or print  File by the due date for filing your return. See instructions	Name of Exempt Organization  WEITZMAN FAMILY FOUNDATION, INC.	Employer identification number  52-2061321
	Number, street, and room or suite number. If a P O box, see instructions  3939 WASHINGTON BLVD	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions  BALTIMORE, MD 21227-4132	

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

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

- The books are in the care of ► STUART WEITZMAN

Telephone No. ► 410-242-0400 FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ►
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN)       . If this is for the whole group, check this box ► . If it is for part of the group, check this box. ►  and attach a list with the names and EINs of all members the extension will cover.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 8/15, 20 10, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

►  calendar year 20 09 or  
►  tax year beginning       , 20       , and ending       , 20       .

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a \$ <u>46.</u>
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b \$ <u>46.</u>
c <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c \$ <u>0.</u>

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

BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form 8868 (Rev 4-2009)