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Form **990-PF**

Department of the Treasury

Return of Private Foundation

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

OMB No 1545-0052

_			be able to use a copy of this	return to satisfy state repo	rting requirements.	
For	<u>calen</u>	dar year 2009, or tax year beginning		, and ending		
G (heck	all that apply: Initial return		rmer public charity	Final return	1
		Amended return	Address chan	ge	Name change	
Use	the	RS Name of foundation			A Employer identification	n number
	abel.				İ	
Oth	erwi				<u>52-6659386</u>	<u> </u>
	print	Number and street (or P O box number if mail is not de	livered to street address)	Room/suite	B Telephone number	
	r type Spec	SE DELL BIRDOM KOND			301-961-90	000
	ructio	the Lord or town, state, and ZIP code	_		C If exemption application is p	
	<u> </u>	CHEVY CHASE, MD 2081			D 1. Foreign organization	s, check here
H	-	type of organization: X Section 501(c)(3) ex			Foreign organizations me check here and attach co	omputation lest,
\perp		TA / Table 1	Other taxable private founda		E If private foundation sta	atus was terminated
		rket value of all assets at end of year J Accounting	•	Accrual	under section 507(b)(1)(A), check here
			her (specify)		F If the foundation is in a	
	\$	1,594,336. (Part I, colu		oasis.)	under section 507(b)(1	4.00
Pa	art I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc., received	,,		N/A	(vasit basis only)
	2	Check X If the foundation is not required to attach Sch B	-		1	
	3	Interest on savings and temporary cash investments	32,029.	22,996.		STATEMENT 1
	4	Dividends and interest from securities	47,038.	46,195.		STATEMENT 2
	5a	Gross rents				
		Net rental income or (loss)				
Revenue	6a	Net gain or (loss) from sale of assets not on line 10	<67,702.	>		
	ь	Gross sales price for all assets on line 6a 592,218.				
e ve	7	Capital gain net income (from Part IV, line 2)		0.		
æ	8	Net short-term capital gain				
	9	Income modifications		_		
	10a	Gross sales less returns and allowances and allowances Less Ost of goods sold				
	Ь					
		Gross profitor (loss) 8 2010 (8)				
	11	Other mitable MIN -	904.	258.		STATEMENT 3
	12	Total. Add tines 1 through 11	12,269.	69,449.		
	13	Compensation of officers cried trustees at	0.	<u> </u>		0.
	14	Other employee salaries and wages				
ဟ	15	Pension plans, employee benefits				
a a	1	Legal fees				1 222
per	1	Accounting fees STMT 4	2,415.	1,207.		1,208.
ũ	[Other professional fees				
tive	l	Interest				
l∜ Administrative Expens	18	Taxes				
Ξ̈́	19	Depreciation and depletion				
₽	20	Occupancy				
	1	Travel, conferences, and meetings				
	22	Printing and publications	10 607	0 1 2 0		2 000
ting ∈	23	Other expenses STMT 5	19,697.	8,129.	· · · · · · · · · · · · · · · · · · ·	3,880.
//A/₹ છ Operatir	24	Total operating and administrative	22,112.	9,336.		5,088.
	25	expenses. Add lines 13 through 23 Contributions, gifts, grants paid	68,144.			68,144.
=	ادع	Total expenses and disbursements.	00,144.			00,144.
N J	26	Add lines 24 and 25	90,256.	9,336.		73,232.
	27	Subtract line 26 from line 12:				13,434.
Ę	l	Excess of revenue over expenses and disbursements	<77,987.	>		
3	1	Net investment income (if negative, enter -0-)		60,113.		
3)	1	Adjusted net income (if negative, enter -0-)			N/A	
9235		riefeston not monine (magaine, citta -o-)			47/44	- 000 PF

923507 02-02-10 LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

For	m 99	90-PF(2009) MARTHA & PHILIP SAGON F.	AMILY FOUNDATI	ON 52-6	5659386 Page 2
P	art	Balance Sheets Attached schedules and amounts in the description Column should be for end-of-year amounts only	Beginning of year	End of	
<u>-</u>	<u> </u>	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
		Cash - non-interest-bearing	_	3.	3.
		Savings and temporary cash investments	68,729.	21,820.	21,820.
	3	Accounts receivable			
		Less: allowance for doubtful accounts			
	4	Pledges receivable ►			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons			
	7	Other notes and loans receivable			
	Ì	Less: allowance for doubtful accounts ▶			
ş	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
ď	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 6	1,028,348.	1,213,564. 146,250.	1,387,566.
	C	Investments - corporate bonds STMT 7	364,188.	146,250.	184,947.
	1	Investments - land, buildings, and equipment, basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment basis			
		Less accumulated depreciation		-	
	15	Other assets (describe)			
	•				
	16	Total assets (to be completed by all filers)	1,461,265.	1,381,637.	1,594,336.
	T	Accounts payable and accrued expenses			
	18	Grants payable			
s	19	Deferred revenue	* .		
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
ΞĢ	21	Mortgages and other notes payable			
Ë		Other liabilities (describe)			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
_		Foundations that follow SFAS 117, check here	.5.0		
		and complete lines 24 through 26 and lines 30 and 31.			
es	24	Unrestricted			
auc	25	Temporarily restricted			
3ag	26	Permanently restricted	- 1		
뎔		Foundations that do not follow SFAS 117, check here		· · · · · · · · · · · · · · · · · · ·	
ᆵ		and complete lines 27 through 31.			
ō	27	Capital stock, trust principal, or current funds	0.	0.	
ets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Assets or Fund Balances	29	Retained earnings, accumulated income, endowment, or other funds	1,461,265.	1,381,637.	
Net/	30	Total net assets or fund balances	1,461,265.	1,381,637.	
Z	30	Total not assets of fund balances	1,101,200.		
	21	Total liabilities and net assets/fund balances	1,461,265.	1,381,637.	
\equiv				1,301,0374	
Р	art	III Analysis of Changes in Net Assets or Fund B	alances		
1	Tota	I net assets or fund balances at beginning of year - Part II, column (a), line	30		
•		st agree with end-of-year figure reported on prior year's return)		1	1,461,265.
2	•	r amount from Part I, line 27a			<77,987.>
_		r increases not included in line 2 (itemize)	•	3	0.
		lines 1, 2, and 3		4	1,383,278.
		eases not included in line 2 (itemize) NONDEDUCTIBLE	EXCISE TAX	5	1,641.
		I net assets or fund balances at end of year (line 4 minus line 5) - Part II, co		6	1,381,637.
Ť	. 5.4	The state of the s	1011		Form 990-PF (2009)

Form 990-PF (2009) MAR'	<u> THA & PHILIP SAC</u>	ON FAM	<u>ILY FOUN</u>	DA'	TION	5	<u>2-665</u>	<u>9386 </u>	Page 3
	and Losses for Tax on I		Income	/h\ t	How acquired				
	tibe the kind(s) of property sold (e., rehouse; or common stock, 200 sh			\ _\ \	low acquired - Purchase - Donation		acquired lay, yr.)	(d) Dat (mo., da	
	<u>. </u>			۲	Donation				
b SEE ATTACHED	STATEMENTS		•						
C									
<u>d</u>				ļ					
_e	49.5	1		Щ					
(e) Gross sales price	(f) Depreciation allowed (or allowable)		t or other basis xpense of sale				ain or (loss) s (f) minus (
a		 -							
b		1							
d d		 -		\dashv			• • • •	•	
e 592,218.		 	659,92	0.	•			<67	,702.
	g gain in column (h) and owned by	the foundation				(I) Gains (C	col. (h) gaın		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any			ol. (k), but r	not less than (from col. (1 -0-) or	
a									
b									
C									
_d				_					
<u>e</u>				_		···· —···		<u><67</u>	<u>,702.</u> :
2 Capital gain net income or (net ca	pital loss) $ \begin{cases} & \text{If gain, also enter} \\ & \text{If (loss), enter} \end{cases} $	er in Part I, line O- in Part I, line	7 7	}	2			<67	,702.
3 Net short-term capital gain or (los		nd (6):							
If gain, also enter in Part I, line 8,	column (c).			$ \cdot $			N/A		
If (loss), enter -0- in Part I, line 8 Part V Qualification U	nder Section 4940(e) fo	r Reduced	Tax on Net	Inv	estment in	come	IN/ A		
(For optional use by domestic private	<u></u>								
	·	10 10(4) 421 011			••1				
If section 4940(d)(2) applies, leave th	us part blank.								
Was the foundation liable for the sect If "Yes," the foundation does not quali			•	od?				Yes	X No
1 Enter the appropriate amount in e				es.					
(a) Base period years Calendar year (or tax year beginnir	(b) Adjusted qualifying dis	stributions	Net value of no	(c) nchar	ritable-use asset	s	Dıstrıb (col. (b) dıv	(d) ution ratio ided by col.	(c))
2008		78,097.		1	,726,00				45247
2007		5,720.		2	,320,36	5.			45562
2006		7,972.			<u>, 254 , 54:</u>				<u>47891</u>
2005		12,823.			,143,17 ₁				52643
2004		L4,897.		_2	<u>,084,768</u>	8.		.0	<u>55113</u>
2 Total of line 1, column (d)						. 2		.2	<u>46456</u>
3 Average distribution ratio for the 5 the foundation has been in exister		on line 2 by 5,	or by the number	of ye	ars	. 3		.0	<u>49291</u>
4 Enter the net value of noncharitab	le-use assets for 2009 from Part X,	, line 5				4		1,371	,213.
5 Multiply line 4 by line 3						5		67	,588.
6 Enter 1% of net investment incom	e (1% 01 Part I, line 2/b)	•			٠	6			601.
7 Add lines 5 and 6						7	<u>-</u>	68	<u>,189.</u>
8 Enter qualifying distributions from		o 1b and some	Into that nort were	0 0 10	V tav rata	8		73	<u>,232.</u>
See the Part VI instructions.	line 7, check the box in Part VI, line	с то, ано сотр	iete tiiat part usini	y a 17	o idx idie.				<u> </u>

Forn	1990-PF (2009) MARTHA & PHILIP SAGON FAMILY FOUNDATION 52-6	<u> 5659386</u>		Page 4
Pa	art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 -	see instru	ctio	ns)
1a	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 instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here X and enter 1%	·	6	01.
	of Part I, line 27b			
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
	Add lines 1 and 2		6	01.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		6	01.
6	Credits/Payments:			<u> </u>
	2009 estimated tax payments and 2008 overpayment credited to 2009 6a 4,060.			
	Exempt foreign organizations - tax withheld at source			
	Tax paid with application for extension of time to file (Form 8868) 6c			
	Backup withholding erroneously withheld 6d			
	Total credits and payments. Add lines 6a through 6d	-	<i>4</i> ∩	60.
_	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8		4 ,0	00.
8				
	· · · · · · · · · · · · · · · · · · ·		2 1	59.
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid Enter the amount of line 10 to be: Credited to 2010 estimated tax 3,459. Refunded 11		<u>3,4</u>	0.
	Enter the amount of line 10 to be: Credited to 2010 estimated tax ► 3,459. Refunded ► 11 Introduction Statements Regarding Activities			
		- 1	Voc	No
18	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in		162	_
	any political campaign?	1a		X
D	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see 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.			
	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. ▶ \$ (2) On foundation managers. ▶ \$ 0.			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation			
	managers. \$\bigsim \\$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		_X_
	If "Yes," attach a detailed description of the activities.	ž.		
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
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	_X_	
	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	X	<u> </u>
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
	If "Yes," attach the statement required by General Instruction T.			
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?	7	X	
	If "Yes," complete Part II, col. (c), and Part XV.			
8a	Enter the states to which the foundation reports or with which it is registered (see 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	8b	<u>X</u> _	
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	10		X
		Form 990 -	-PF	2009)

	00-PF(2009) MARTHA & PHILIP SAGON FAMILY FOUNDATION 52-6659	<u> 386</u>		Page 5
Part	VII-A Statements Regarding Activities (continued)			
11 ·At	any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
se	ection 512(b)(13)? If "Yes," attach schedule (see instructions)	11		<u>X</u> _
12 Di	d the foundation acquire a direct or indirect interest in any applicable insurance contract before	1 1		
AL	ugust 17, 2008?	12		<u>X</u>
13 Di	d the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
W	ebsite address ▶ N/A			
14 Th	ne books are in care of ▶ MR. HAROLD ZIRKIN Telephone no. ▶ 301-96	51-9	000	
	ocated at ▶3 BETHESDA METRO CTR SUITE 840, BETHESDA, MD ZIP+4 ▶20	0814		
	ection 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here			
	nd enter the amount of tax-exempt interest received or accrued during the year	N	/A	
	VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
	ile Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
	uring the year did the foundation (either directly or indirectly):			,
) Engage in the sale or exchange, or leasing of property with a disqualified person?			
	Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
-,	a disqualified person?	1 1		
13	Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
-	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1 1		!
	Transfer any income or assets to a disqualified person (or make any of either available	1 1		
(5	for the benefit or use of a disqualified person)?	1 1		
16				
10	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		ŀ	
L If				
	any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	,		•
	ection 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	rganizations relying on a current notice regarding disaster assistance check here	1 1	ļ	
	d the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			
	efore the first day of the tax year beginning in 2009?	1c		<u>X</u>
	axes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			
	efined in section 4942(j)(3) or 4942(j)(5)):	1 1		
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			
be	efore 2009? Yes X No			
	"Yes," list the years,,,,,,			
b Ar	re there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect			
va	iluation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach			
sta	atement - see instructions.) . N/A	2b		
c If	the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	1 [
>	·			
3a Di	id the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	1 [
du	uring the year? Yes X 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			
	ay 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose			
	holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,		ļ	
	orm 4720, to determine if the foundation had excess business holdings in 2009.) N/A	3b	[
	id the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
	id the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that		\neg	
	ad not been removed from jeonardy before the first day of the tay year beginning in 20092	l ab	-	x

orm 990-PF (2009) MARTHA & PHILIP SAGON FA			<u>52-66593</u>	86	Page 6
Part VII-B Statements Regarding Activities for Which	Form 4/20 May Be I	Requirea (contin	ued)	·	
5a During the year did the foundation pay or incur any amount to:	- 4045(-)\0		es X No		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section)			es LALINO		
(2) Influence the outcome of any specific public election (see section 4955);	or to carry on, directly or indire		es X No		
any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes	•2		es X No		ł
(4) Provide a grant to an individual for days, study, or other similar purpose.	•		35 (25) 110		
509(a)(1), (2), or (3), or section 4940(d)(2)?	on described in section		es X No	İ	
(5) Provide for any purpose other than religious, charitable, scientific, literary	or educational nurnoses, or t		3 (25) 110		
the prevention of cruelty to children or animals?	, or concational purposes, or i		es X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	Ider the excentions described i		3 110		İ
section 53.4945 or in a current notice regarding disaster assistance (see instri		riogulationo	N/A	5b	1
Organizations relying on a current notice regarding disaster assistance check	•				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption		ined	· -		
expenditure responsibility for the grant?		//A 🔲 Ye	s No		
If "Yes," attach the statement required by Regulations section 53.494		.,			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to			j		
a personal benefit contract?	pay promisino on		es X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a	personal benefit contract?			6ь	l 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?	Y	s X No		,
b If yes, did the foundation receive any proceeds or have any net income attribu				7b	
Part VIII Information About Officers, Directors, Trust	tees, Foundation Ma	nagers, Highly	y		
Palu Employees, and Contractors	_				
List all officers, directors, trustees, foundation managers and their		1	(al) 0		
(a) Name and address	(b) Title, and average hours per week devoted	(c) Compensation (If not paid,	(d) Contributions to employee benefit plans and deferred		xpense nt, other
	to position	`enter'-0-)	compensation	allov	vances
HAROLD ZIRKIN	TRUSTEE, TREA	SURER			
B BETHESDA METRO CENTER, SUITE 840					^
BETHESDA, MD 20814	5.00	0.	0.	<u> </u>	0.
	_				
	_				
	_				
	_	li .			
	_				
2 Compensation of five highest-paid employees (other than those in	cluded on line 1). If none,	enter "NONE."		L	
	(b) Title, and average		(d) Contributions to employee benefit plans	(e) E	xpense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deferred compensation		nt, other vances
NONE					
	_				
	<u> </u>	<u> </u>	<u> </u>		
Total number of other employees paid over \$50,000				990-PF	0
			Form :	33U-F	(2009)

923551 02-02-10

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Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	on Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter "I	IONE."	
(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 Part IX-A Summary of Direct Charitable Activities		<u>▶</u> 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistica number of organizations and other beneficiaries served, conferences convened, research papers product		Expenses
1N/A		
2		
3		
4		
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on line	es 1 and 2	Amount
1 N/A	o rund E.	7 anount
2		
All other program-related investments. See instructions.		
Total Add lines 1 through 3		0.

P	Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndation	s, 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	1,323,147.
b	Average of monthly cash balances	1b	1,323,147. 68,947.
C	Fair market value of all other assets	1c	
-	Total (add lines 1a, b, and c)	1d	1,392,094.
	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	1,392,094.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	20,881.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,371,213.
6	Minimum investment return. Enter 5% of line 5	6	68,561.
P	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	ıd certaıı	
1	Minimum investment return from Part X, line 6	1	68,561.
2a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009. (This does not include the tax from Part VI.) 2b 138.		
C	Add lines 2a and 2b	2c	739.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	67,822.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	67,822.
6	Deduction from distributable amount (see instructions)	6	0.
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	67,822.
P	art 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	73,232.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	<u> </u>
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	73,232.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	601.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	72,631.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of	jualifies	for the section

Form **990-PF** (2009)

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				67,822.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:				
		0.		
3 Excess distributions carryover, if any, to 2009:				•
a From 2004 7, 100.				
b From 2005 10,574.				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	17,674.			
4 Qualifying distributions for 2009 from				
Part XII, line 4: ▶\$ 73,232.				
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		·		67,822.
e Remaining amount distributed out of corpus	5,410.			
5 Excess distributions carryover applied to 2009	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
2 Corpus Add lines 31, 4c, and 4e Subtract line 5	23,084.			
b Prior years' undistributed income. Subtract	23,004.			
line 4b from line 2b		0.		
c Enter the amount of prior years'		<u> </u>		
undistributed income for which a notice of				
deficiency has been issued, or on which				
the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2008. Subtract line		· ·		
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2010				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004				
not applied on line 5 or line 7	7,100.			
9 Excess distributions carryover to 2010.				
Subtract lines 7 and 8 from line 6a	15,984.			
10 Analysis of line 9:				
a Excess from 2005 10,574.				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008		ļ		
e Excess from 2009 5, 410.				
				Form 990-PF (2009)

	& PHILIP SA				59386 Page 10
Part XIV Private Operating F			I-A, question 9)	N/A_	
1 a If the foundation has received a ruling					
foundation, and the ruling is effective for		•	▶└		
b Check box to indicate whether the foun		ig foundation described		4942(j)(3) or49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year	/h) 2009	Prior 3 years	(4) 2006	(a) Tatal
income from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
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				<u>-</u>	
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		· <u>-</u> ·	1		
an exempt organization					
(4) Gross investment income					
Part XV Supplementary Info	ormation (Comple	te this part only	if the foundation	n had \$5,000 or m	ore in assets
at any time during	the year-see the i	nstructions.)			
1 Information Regarding Foundation	on Managers:				
a List any managers of the foundation w			tributions received by the	e foundation before the clo	se of any tax
year (but only if they have contributed	more than \$5,000). (See s	ection 507(d)(2).)			
HAROLD ZIRKIN					
b List any managers of the foundation where entity) of which the foundation has			(or an equally large port	ion of the ownership of a p	artnership or
• •	15 a 10 % of greater interes) L			
NONE		<u> </u>			
2 Information Regarding Contribut			-		seate for friends. If
Check here if the foundation the foundation makes gifts, grants, etc.					
	· · · · · · · · · · · · · · · · · · ·				
a The name, address, and telephone num		• •	addressed;		
MR. HAROLD ZIRKIN, 3 3 BETHESDA METRO CEN			ארט ארוסיי	814	
b The form in which applications should				0T. 4	
LETTER EXPLAINING PU			Todio moiduo.		
c Any submission deadlines: NO DEADLINES					
d Any restrictions or limitations on award	ls, such as by geographica	al areas, charitable fields.	kinds of institutions, or	other factors:	
NO RESTRICTIONS OR I			•		

Fait AV Supplementary information				-
3 Grants and Contributions Paid During the	Year or Approved for Future	Payment	r	
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation	Purpose of grant or	
Name and address (home or business)	any foundation manager	status of	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		
a Paid during the year			1	
	•			
	i			
			 	
	+			
	1			
		-		
		1		
SEE STATEMENT 8				
Total			► 3a	68,144.
b Approved for future payment			1	
				•
			ļ	
NONE				
]	
Total			▶ 3b	0.
923611 02-02-10			Fo	orm 990-PF (2009)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.		ousiness income		y section 512, 513, or 514	(e)
4.8	(a) Business	(b) Amount	(C) Exclu- sion	(d) Amount	Related or exempt function income
1 Program service revenue:	code		code	7 1170 0111	
a	-				
b	-	-	 		
<u> </u>	-		1		
d	-		+		
e	-				
· 	- 		- 		
g Fees and contracts from government agencies 2 Membership dues and assessments			+		
•	 		+		<u> </u>
3 Interest on savings and temporary cash investments			14	32,029.	
4 Dividends and interest from securities			14	47,038.	
5 Net rental income or (loss) from real estate:			14	47,030.	
a Debt-financed property					_
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property	ŀ				
7 Other investment income	900099	904.			-
8 Gain or (loss) from sales of assets other	500055	704.	<u>' </u>		
than inventory			18	<67,702.>	
9 Net income or (loss) from special events			1-0	(07,702.)	
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b		··· -	1	· · · · · · · · · · · · · · · · · · ·	
c					
d					
е					
12 Subtotal. Add columns (b), (d), and (e)	-	904.		11,365.	0
13 Total. Add line 12, columns (b), (d), and (e)	<u> </u>		'	13	12,269
(See worksheet in line 13 instructions to verify calculations.)			··· <u>-</u>	
		nlichment of E	vomat D		
Part XVI-B Relationship of Activities	s to the Accon	iplishment of E	xempt P	urposes	
Line No. Explain below how each activity for which in	come is reported in c	column (e) of Part XVI-A	A contributed	importantly to the accomp	lishment of
the foundation's exempt purposes (other th					
		-			

Line No.	the foundation's exempt purposes (other than by providing funds for such purposes).					
	_ 					
l						

923621 02-02-10

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Part XVII **Exempt Organizations** Yes No 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: X 1a(1) (1) Cash X 1a(2) (2) Other assets **b** Other transactions: (1) Sales of assets to a noncharitable exempt organization 1b(1) 1b(2) (2) Purchases of assets from a noncharitable exempt organization 1b(3) (3) Rental of facilities, equipment, or other assets 1b(4) (4) Reimbursement arrangements X (5) Loans or loan guarantees 1b(5) (6) Performance of services or membership or fundraising solicitations 1b(6) c Sharing of facilities, equipment, mailing lists, other assets, or paid employees 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. (b) Amount involved (c) Name of noncharitable exempt organization (a) Line no (d) Description of transfers, transactions, and sharing arrangements N/A is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described ☐ Yes X No in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? b If "Yes," complete the following schedule. (a) Name of organization (b) Type of organization (c) Description of relationship N/A 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, DIRECTOR Signature of officer or trustee Check if Preparer's identifying number Preparer's signature employed > SNYDER COHN. PC EIN > Firm's name (or yours

923622

SUITE 520

4520 EAST WEST HIGHWAY,

MD 20814-3338

if self-employed), address, and ZIP code

Phone no.

301-652-6700

CONTINUATION FOR 990-PF, PART IV

MARTHA & PHILIP SAGON FAMILY FOUNDATION 52-6659386 PAGE 1 OF 2

Part IV Capital Gains and Losses for Tax on Investment Income

Capital Gaille allu Lu	19969 IOL LOY OIL HILAESTIHETIT HICOHIE				
(a) List and describe the kind(s) of property sold, e.g., real estate, (b) How acquired (c) Date acquired (d) Date so					
	D - Donation	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			
	Y CHASE PFD CAP	P	02/18/0903/30/09		
		SER A	P	02/18/0903/30/09	
		UST INC	P	01/30/0906/11/09	
	NGARTEN RLTY INV		P	04/16/0907/29/09	
	DER MORGAN MGMT	LLC	P	03/14/0602/20/09	
<u>f 100000 BF SAUL</u>			P	02/10/0403/02/09	
	HASE BANK 6.875%		P	11/24/0303/30/09	
h 0.1614 SH. KIN	DER MORGAN MGMT		P	03/14/0605/22/09	
10.6913 SH. JER	INVESTORS TRUST	INC	P	12/09/04/06/09/09	
<u> 949.3087 SHS.</u>	JER INVESTORS TR	UST INC	P	VARIOUS 06/11/09	
<u>k 125000 RIGGS N</u>	ATL CORP WASH 9.	65%	P	03/23/0106/15/09	
_ 1 0.2546 SH. KIN	DER MORGAN MGMT	LLC	P	03/14/0608/20/09	
m 0.5194 SH. KIN	DER MORGAN MGMT	LLC	P	03/14/0611/18/09	
n 140 SHS. JP MO	RGAN CHASE & COM	PANY	P	11/25/8312/04/09	
0 2773 SHS. BANK	OF NEW YORK MEL	LON CORP	P	11/25/8312/11/09	
(a) Cross sales pries	(f) Depreciation allowed	(g) Cost or other basis	1)) Gain or (loss)	
(e) Gross sales price	(or allowable)	plus expense of sale	(e)	plus (f) minus (g)	
a 1,283.				1,283.	
b 51,556.		34,730.	-	16,826.	
c 382.		8,360.		<7,978.>	
d 64,649.		48,375.		16,274.	
e 28.		23.		5.	
f 103,750.		100,000.		3,750.	
g 103,438.		100,000.		3,438.	
h 7.		6.		1.	
1		105.		<105.>	
370.		143,145.		<142,775.>	
k 125,000.		122,188.	<u>-</u>	2,812.	
11.		9.		2.	
m 25.		17.		8.	
n 5,773.		350.		5,423.	
		3,757.	· · · · · · · · · · · · · · · · · · ·	70,835.	
	ng gain in column (h) and owned by		(1) 1 0	sses (from col. (h))	
Complete only for access chewi	(i) Adjusted basis	(k) Excess of col. (i)		of col. (h) gain over col. (k),	
(i) F.M.V. as of 12/31/69	as of 12/31/69	over col. (j), if any		not less than "-0-")	
2		<u></u>		1,283.	
<u>a</u> b				16,826.	
				<7,978.>	
<u>c</u>				16,274.	
<u>d</u>			_	5.	
<u>e</u>				3,750.	
<u>f</u>				3,438.	
9				1.	
<u>h</u>				<105.>	
				<142,775.>	
<u> </u>				2,812.	
<u>k</u>		-			
1				<u> </u>	
<u>m</u>				<u>8.</u>	
<u>n</u>				5,423.	
0	L	L		70,835.	
a O	apitat loss) . { If gain, also enter apitat loss), enter "-C	n Part I, line 7			
2 Capital gain net income or (net ca	apital loss) (If (loss), enter *-0)-" in Part I, line 7]	2		
	ss) as defined in sections 1222(5) an	nd (6):			
If gain, also enter in Part I, line 8,		†			
If (loss), enter "-0-" in Part I, line	U	ノ	3		

	sses for Tax on investment income		(h) How coours	11	
2-story b	d describe the kind(s) of property sol rick warehouse; or common stock, 2	00 shs. MLC Co.	P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(o., day, y,
	EDHEALTH GROUP I		P	06/09/06	12/11/09
b KKR FINANCIAL HOLDINGS - EIN#11-3801844				VARIOUS	VARIOUS
FINANCIAL	HOLDINGS - EIN#1	1-3801844	P	VARIOUS	VARIOUS
TAL GAINS	DIVIDENDS				
_					
		<u> </u>			
			-		
				<u> </u>	
				1	
oss sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(I (e)	i) Gain or (loss) plus (f) minus (g)	
61,219.		91,572.			<30,353.
		4,328.			<4,328.
		2,955.			<2,955.
135.					135.
	· · · · · · · · · · · · · · · · · · ·				
		Ab a favor data as a 10/01/00			
. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	Gains (excess	sses (from col. (h) of col. (h) gain ove not less than "-0-")) er col. (k),
<u> </u>	23 01 12/3 1/03	Over cor. (j), ii arry			-20 2E2
				<u>-</u>	<30,353.
					<4,328. <2,955.
					135.
<u> </u>					100.
					···
			 -		
	-				 -
					-
	-				
n net income or (net ca	apital loss) { If gain, also enter If (loss), enter If	r in Part I, line 7)-" in Part I, line 7	2		<67,702.
		\		-	
	ss) as defined in sections 1222(5) an column (c).	\			NI / N

FORM 990-PF INTEREST ON SAVI	NGS AND TE	MPORARY CA	ASH :	INVESTMENTS	STATEMENT	1
SOURCE					AMOUNT	
KKR FINANCIAL HOLDINGS - EIN#11-3801844 M&T BANK TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A						50. 79.
						29.
FORM 990-PF DIVIDEND	S AND INTE	REST FROM	SEC	JRITIES	STATEMENT	2
SOURCE	GROS	s amount		PITAL GAINS DIVIDENDS	COLUMN (A)
KKR FINANCIAL HOLDINGS - EIN#11-3801844 M&T BANK		1,179. 45,994.		0. 135.	1,1' 45,8!	
TOTAL TO FM 990-PF, PART I, I	.n 4	47,173.		135.	47,0	38.
FORM 990-PF OTHER INCOME					STATEMENT	3
DESCRIPTION		(A) REVENUE PER BOOKS	5	(B) NET INVEST- MENT INCOME		
KKR FINANCIAL HOLDINGS - EIN#11-3801844	_	g	04.	258	•	•
TOTAL TO FORM 990-PF, PART I,	LINE 11 =	9	04.	258	•	
FORM 990-PF	ACCOUNT	ING FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOMI	(D) CHARITAI E PURPOSI	
ACCOUNTING FEES	2,415	. 1,	207		1,20	08.

FORM . 990-PF	OTHER E	XPENSES			STATEMENT	5
DESCRIPTION	(A) (B) EXPENSES NET INVES PER BOOKS MENT INCO			(C) ADJUSTED NET INCOM		
INVESTMENT ADVISORY MANAGEMENT FEES KKR FINANCIAL HOLDINGS -	7,760.	3,8	80.		3,8	во.
EIN#11-3801844	11,937.	4,2	49.			0.
TO FORM 990-PF, PG 1, LN 23	19,697.	8,12	29.		3,8	80.
FORM 990-PF	CORPORAT	E STOCK			STATEMENT	6
DESCRIPTION			воо	K VALUE	FAIR MARKE' VALUE	r
CORPORATE STOCK			1,213,564.		1,387,566.	
TOTAL TO FORM 990-PF, PART II, LINE 10B			1	,213,564.	1,387,5	66.
FORM 990-PF	CORPORAT	E BONDS			STATEMENT	7
						_
DESCRIPTION			воо	K VALUE	FAIR MARKE' VALUE	ľ
DESCRIPTION CORPORATE BONDS		_	воо	146,250.		

	AND CONTRIBUTIONS DURING THE YEAR	STAT	EMENT 8
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
TRUST FOR THE NATIONAL MALL 601 13TH STREET, NW, SUITE 300 WASHINGTON, DC 20036	NONE GENERAL	CHARITABLE ORGANIZATI	4,375.
THE JOHN F KENNEDY CENTER FOR THE PERFORMING ARTS P.O.BOX 101510 ARLINGTON, VA 22210	NONE GENERAL	CHARITABLE ORGANIZATI	1,594.
THE PHILLIPS COLLECTION 1600 21ST STREET, NW WASHINGTON, DC 20009	NONE GENERAL	CHARITABLE ORGANIZATI	1,600.
NATIONAL SYMPHONY ORCHESTRA P.O.BOX 101510 ARLINGTON, VA 22210	NONE GENERAL	CHARITABLE ORGANIZATI	25,000.
NATIONAL SYMPHONY ORCHESTRA P.O.BOX 101510 ARLINGTON, VA 22210	NONE GENERAL	CHARITABLE ORGANIZATI	5,290.
THE SEED FOUNDATION 1776 MASSACHUSETTS AVE, NW, SUITE 600 WASHINGTON, DC 20036	NONE GENERAL	CHARITABLE ORGANIZATI	5,000.
WASHINGTON HEBREW CONGREGATION 3935 MACOMB STREET, NW WASHINGTON, DC 20016	NONE GENERAL	CHARITABLE ORGANIZATI	5,285.
WETA FM 2775 SOUTH QUINCY STREET ARLINGTON, VA 22206	NONE GENERAL	CHARITABLE ORGANIZATI	10,000.

МАРФИА	2	DHTT.TD	CACON	FAMTI.V	FOUNDATION
MAKIDA	œ	PULLIF	DAGOIA	LWITTI	LOUNDALION

52-6659386

THE PHILLIPS COLLECTION 1600.21ST STREET, NW WASHINGTON, DC 20009

NONE GENERAL CHARITABLE ORGANIZATI 10,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

68,144.