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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

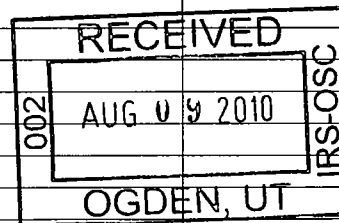
Note The foundation may be able to use a copy of this return to satisfy state reporting requirements.

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

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

Use the IRS label. Otherwise, print or type See Specific Instructions	Name of foundation THE ARZAK FOUNDATION		A Employer identification number 87-0760799
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite C/O ROPES & GRAY LLP, ONE INTERNATIONAL		B Telephone number (617) 951-7209
	City or town, state, and ZIP code BOSTON, MA 02110-2624		C If exemption application is pending, 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		D 1 Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 9,647,817.94 (Part I, column (d) must be on cash basis.)		J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	
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 ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	4,020.00		N/A	
2	Check ☒ if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments	121.29	121.29		STATEMENT 1
4	Dividends and interest from securities	72,321.43	72,321.43		STATEMENT 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10				
b	Gross sales price for all assets on line 6a				
7	Capital gain net income (from Part IV line 2)		0.00		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss)				
11	Other income				
12	Total. Add lines 1 through 11	76,462.72	72,442.72		
13	Compensation of officers, directors, trustees, etc.	0.00	0.00		0.00
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees STMT 3	7,060.10	3,530.05		3,530.05
c	Other professional fees				
17	Interest				
18	Taxes				
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses				
24	Total operating and administrative expenses. Add lines 13 through 23	7,060.10	3,530.05		3,530.05
25	Contributions, gifts, grants paid	422,238.00			422,238.00
26	Total expenses and disbursements. Add lines 24 and 25	429,298.10	3,530.05		425,768.05
27	Subtract line 26 from line 12	-352,835.38			
a	Excess of revenue over expenses and disbursements				
b	Net investment income (if negative, enter -0-)		68,912.67		
c	Adjusted net income (if negative, enter -0-)			N/A	



Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		21,098.40	23,247.42	23,247.42
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock				
	c	Investments - corporate bonds				
11	Investments - land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 4		9,980,342.92	9,625,358.52	9,624,570.52	
14	Land, buildings, and equipment: basis ▶					
	Less accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers)		10,001,441.32	9,648,605.94	9,647,817.94	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		0.00	0.00	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ☒					
	27	Capital stock, trust principal, or current funds		0.00	0.00	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund		0.00	0.00	
	29	Retained earnings, accumulated income, endowment, or other funds		10,001,441.32	9,648,605.94	
30	Total net assets or fund balances		10,001,441.32	9,648,605.94		
31	Total liabilities and net assets/fund balances		10,001,441.32	9,648,605.94		

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	10,001,441.32
2	Enter amount from Part I, line 27a	2	-352,835.38
3	Other increases not included in line 2 (itemize) ▶	3	0.00
4	Add lines 1, 2, and 3	4	9,648,605.94
5	Decreases not included in line 2 (itemize) ▶	5	0.00
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	9,648,605.94

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b	NONE		
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			

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). 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 instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	485,742.85	9,951,006.68	.048813
2007	436,406.00	10,037,749.00	.043476
2006	244,927.00	10,082,356.00	.024293
2005			
2004			

2 Total of line 1, column (d)	2	.116582
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	.040182
LINE 3 BASED ON SHORT-YEAR PERIOD OF 2.9013700 YEARS		
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	9,685,377.40
5 Multiply line 4 by line 3	5	389,177.83
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	689.13
7 Add lines 5 and 6	7	389,866.96
8 Enter qualifying distributions from Part XII, line 4	8	425,768.05
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions.		

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	689.13
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		2	0.00
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	689.13
3 Add lines 1 and 2		4	0.00
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	689.13
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	6,293.85	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	6,293.85	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	5,604.72	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ☒ Refunded ☒	11	0.00	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☒ \$ 0.00 (2) On foundation managers ☒ \$ 0.00		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0.00		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ► N/A

14 The books are in care of ► L. DENNIS SHAPIRO Telephone no. ► (617) 277-6886
 Located at ► 24 ESSEX ROAD, CHESTNUT HILL, MA ZIP+4 ► 02467-1317

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐
 and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A

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

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

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

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

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

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
L. DENNIS SHAPIRO	TRUSTEE			
24 ESSEX ROAD				
CHESTNUT HILL, MA 02467	1.00	0.00	0.00	0.00
SUSAN R. SHAPIRO	TRUSTEE			
24 ESSEX ROAD				
CHESTNUT HILL, MA 02467	1.00	0.00	0.00	0.00

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

▶ 0

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Part VIII**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

Total number of others receiving over \$50,000 for professional services

0

Part IX-A**Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 THE ARZAK FOUNDATION IS A PRIVATE FOUNDATION WHICH DISTRIBUTES INVESTMENT INCOME TO CHARITABLE ORGANIZATIONS QUALIFYING UNDER IRC SEC 501(C)(3).	0.00
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 lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	0.00

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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	9,809,332.54
b	Average of monthly cash balances	1b	23,537.92
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	9,832,870.46
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.00
2	Acquisition indebtedness applicable to line 1 assets	2	0.00
3	Subtract line 2 from line 1d	3	9,832,870.46
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	147,493.06
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	9,685,377.40
6	Minimum investment return. Enter 5% of line 5	6	484,268.87

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	484,268.87
2a	Tax on investment income for 2009 from Part VI, line 5	2a	689.13
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	689.13
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	483,579.74
4	Recoveries of amounts treated as qualifying distributions	4	0.00
5	Add lines 3 and 4	5	483,579.74
6	Deduction from distributable amount (see instructions)	6	0.00
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	483,579.74

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	425,768.05
b	Program-related investments - total from Part IX-B	1b	0.00
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	425,768.05
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	689.13
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	425,078.92

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.

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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				483,579.74
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			63,029.18	
b Total for prior years:		0.00		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.00			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$ 425,768.05				
a Applied to 2008, but not more than line 2a			63,029.18	
b Applied to undistributed income of prior years (Election required - see instructions)		0.00		
c Treated as distributions out of corpus (Election required - see instructions)	0.00			
d Applied to 2009 distributable amount				362,738.87
e Remaining amount distributed out of corpus	0.00			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.00			0.00
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.00			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.00		
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		0.00		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.00		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.00	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				120,840.87
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.00			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.00			
9 Excess distributions carryover to 2010 Subtract lines 7 and 8 from line 6a	0.00			
10 Analysis of line 9.				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

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

N/A

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

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

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

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)**1 Information Regarding Foundation Managers.**

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

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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

c Any submission deadlines:

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SEE STATEMENT 5				
Total			▶ 3a	422,238.00
b Approved for future payment				
NONE				
Total			▶ 3b	0.00

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
FIDELITY CASH RESERVES	121.29
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	121.29

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
FIDELITY INSTL MMKT PORT CL I	72,321.43	0.00	72,321.43
TOTAL TO FM 990-PF, PART I, LN 4	72,321.43	0.00	72,321.43

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	7,060.10	3,530.05		3,530.05
TO FORM 990-PF, PG 1, LN 16B	7,060.10	3,530.05		3,530.05

FORM 990-PF OTHER INVESTMENTS STATEMENT 4

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
FIDELITY INSTITUTIONAL MMKT PORT CL I	COST	9,625,358.52	9,624,570.52
TOTAL TO FORM 990-PF, PART II, LINE 13		9,625,358.52	9,624,570.52

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 5

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ACLU 125 BROAD ST. 18TH FLOOR NEW YORK, NY 10004	NONE CHARITABLE	PUBLIC CHARITY	500.00
ALAMEDA COUNTY COMM FOR P. O. BOX 2599 OAKLAND, CA 94614	NONE CHARITABLE	PUBLIC CHARITY	100.00
ALTERNATIVE LIVING FOR THE AGING 937 N. FAIRFAX AVE W HOLLYWOOD, CA 90046	NONE CHARITABLE	PUBLIC CHARITY	225.00
AMERICAN JEWISH HISTORY 15 WEST 16TH ST. NEW YORK, NY 10011	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
AMERICAN JEWISH WORLD 45 WEST 36TH ST NEW YORK, NY	NONE CHARITABLE	PUBLIC CHARITY	3,000.00
ARRL FOUNDATION 325 MAIN ST. NEWINGTON, CT 061111494	NONE CHARITABLE	PUBLIC CHARITY	2,009.00
ARZA 633 THIRD AVE NEW YORK, NY 10017	NONE CHARITABLE	PUBLIC CHARITY	1,800.00
ARZA 633 THIRD AVE NEW YORK, NY 10017	NONE CHARITABLE	PUBLIC CHARITY	1,800.00

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BAY AREA OUTREACH 600 BANCROFT WAY BERKELEY, CA 94710	NONE CHARITABLE	PUBLIC CHARITY	100.00
BETH ISRAEL DEACONESS MEDICAL CENTER 330 BROOKLINE AVE BOSTON, MA 2215	NONE CHARITABLE	PUBLIC CHARITY	3,009.00
BOSTON ANTHERNAEUM 10.5 BEACON ST BOSTON, MA 02108	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
BOSTON JEWISH FILM FESTIVAL 100 WATERTOWN ST. W. NEWTON, MA 02465	NONE CHARITABLE	PUBLIC CHARITY	320.00
BOSTON LYRIC OPERA 45 FRANKLIN ST. #4 BOSTON, MA 02110	NONE CHARITABLE	PUBLIC CHARITY	1,300.00
BOSTON LYRIC OPERA 45 FRANKLIN ST. BOSTON, MA 02110	NONE CHARITABLE	PUBLIC CHARITY	25,000.00
BOSTON LYRIC OPERA 45 FRANKLIN ST. BOSTON, MA 02110	NONE CHARITABLE	PUBLIC CHARITY	300.00
BOSTON LYRIC OPERA 45 FRANKLIN ST. BOSTON, MA 02110	NONE CHARITABLE	PUBLIC CHARITY	50,009.00
CAMERA P. O. BOX 35040 BOSTON, MA 02135	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
CHABAD LA 834 28TH AVENUE SAN FRANCISCO, CA 94121	NONE CHARITABLE	PUBLIC CHARITY	180.00

THE ARZAK FOUNDATION

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COMBINED JEWISH PHILANTHROPIES 126 HIGH ST. BOSTON, MA 02110	NONE CHARITABLE	PUBLIC CHARITY	50,009.00
COMMONWEALTH CLUB OF CA 595 MARKET ST 2ND FL SAN FRANCISCO, CA 94105	NONE CHARITABLE	PUBLIC CHARITY	500.00
CONGREGATION BETH ISRAEL BOSTON, MA	NONE CHARITABLE	PUBLIC CHARITY	1,000.00
DOCTORS WITHOUT BORDERS 333 7TH AVE 2ND FLOOR NEW YORK, NY 10001	NONE CHARITABLE	PUBLIC CHARITY	500.00
E AA FOUNDATION 11311 W. FOREST HOME AVE FRANKLIN, WI 53130	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
FACING OURSELVES AND HISTORY 16 HURD ROAD BROOKLINE, MA 02445	NONE CHARITABLE	PUBLIC CHARITY	1,509.00
FRIENDS LEVITT PAVILION 2230 WEST 6TH ST. LOS ANGELES, CA 90057	NONE CHARITABLE	PUBLIC CHARITY	250.00
GOLDEN GATE NAT PKS BUILDING 201, FORT MASON SAN FRANCISCO, CA 94123	NONE CHARITABLE	PUBLIC CHARITY	100.00
HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG PLACE SW WASHINGTON, DC 200242126	NONE CHARITABLE	PUBLIC CHARITY	500.00
HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG PLACE SW WASHINGTON, DC 200242126	NONE CHARITABLE	PUBLIC CHARITY	10,009.00

THE ARZAK FOUNDATION

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HUC-JIR IJSO 1 WEST 4TH ST NEW YORK, NY 10012	NONE CHARITABLE	PUBLIC CHARITY	500.00
HUC-JIR IJSO 1 WEST 4TH ST NEW YORK, NY 10012	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
HUC-JIR IJSO 1 WEST 4TH ST NEW YORK, NY 10012	NONE CHARITABLE	PUBLIC CHARITY	1,800.00
HUNTINGTON LIBRARY 1151 OXFORD ROAD SAN MARINO, CA 91108	NONE CHARITABLE	PUBLIC CHARITY	5,000.00
INDIAN LAW RESOURCE CENTER 602 NORTH EWING ST HELENA, MT 59601	NONE CHARITABLE	PUBLIC CHARITY	500.00
ISRAEL CALLS 2227 MIDVALE AVE LOS ANGELES, CA 90064	NONE CHARITABLE	PUBLIC CHARITY	180.00
JEWISH COMM. FED GREAT 121 STUART ST SAN FRANCISCO, CA	NONE CHARITABLE	PUBLIC CHARITY	2,000.00
JEWISH COMMUNITY HOUSING FOR THE ELDERLY 30 WALLINGFORD RD BRIGHTON, MA 02135	NONE CHARITABLE	PUBLIC CHARITY	2,509.00
JEWISH FAMILY AND CHILDREN'S SERVICES 1430 MAIN ST. SAN FRANCISCO, CA 94134	NONE CHARITABLE	PUBLIC CHARITY	2,000.00
JEWISH FAMILY AND CHILDREN'S SERVICES 1430 MAIN ST. SAN FRANCISCO, CA 94134	NONE CHARITABLE	PUBLIC CHARITY	275.00

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JEWISH FEDERATION OF GREATER 6505 WILSHIRE BOULEVARD LOS ANGELES, CA 90048	NONE CHARITABLE	PUBLIC CHARITY	1,250.00
JEWISH FEDERATION OF GREATER 6505 WILSHIRE BOULEVARD LOS ANGELES, CA 90048	NONE CHARITABLE	PUBLIC CHARITY	250.00
JEWISH NATIONAL FUND 42 EAST 69TH ST NEW YORK, NY 10021	NONE CHARITABLE	PUBLIC CHARITY	325.00
KALW 91.7 500 MANSELL ST SAN FRANCISCO, CA	NONE CHARITABLE	PUBLIC CHARITY	100.00
KQED 2601 MARIPOSA ST. SAN FRANCISCO, CA 94110	NONE CHARITABLE	PUBLIC CHARITY	100.00
LIBRARY OF CONGRESS 101 INDEPENDENCE AVE SE WASHINGTON, DC 20540	NONE CHARITABLE	PUBLIC CHARITY	24,979.00
LYMPHOMA RESEARCH FOUNDATION 115 BROADWAY 13TH FLOOR NEW YORK, NY 10006	NONE CHARITABLE	PUBLIC CHARITY	250.00
MARIA MITCHELL ASSOC 4 VESTAL ST. NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
MASS AUDOBON 208 SOUTH GREAT RD LINCOLN, MA 01773	NONE CHARITABLE	PUBLIC CHARITY	50.00
MASS EYE AND EAR 243 CHARLES ST. BOSTON, MA 02114	NONE CHARITABLE	PUBLIC CHARITY	3,509.00

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MASS EYE AND EAR 243 CHARLES ST. BOSTON, MA 02114	NONE CHARITABLE	PUBLIC CHARITY	3,116.00
MASS EYE AND EAR 243 CHARLES ST. BOSTON, MA 02114	NONE CHARITABLE	PUBLIC CHARITY	1,000.00
MASSACHUSETTS GENERAL HOSPITAL 55 FRUIT ST BOSTON, MA	NONE CHARITABLE	PUBLIC CHARITY	5,009.00
MASSACHUSETTS GENERAL HOSPITAL 55 FRUIT ST BOSTON, MA	NONE CHARITABLE	PUBLIC CHARITY	1,509.00
MASSACHUSETTS HISTORICAL SOCIETY 1154 BOYLSTON ST. BOSTON, MA	NONE CHARITABLE	PUBLIC CHARITY	19,999.00
MASSACHUSETTS HISTORICAL SOCIETY 1154 BOYLSTON ST. BOSTON, MA 02215	NONE CHARITABLE	PUBLIC CHARITY	10,000.00
MASSACHUSETTS HISTORICAL SOCIETY 1154 BOYLSTON ST. BOSTON, MA 022153695	NONE CHARITABLE	PUBLIC CHARITY	20,009.00
MAZON 10495 SANTA MONICA BLVD SUITE 100 LOS ANGELES, CA 90025	NONE CHARITABLE	PUBLIC CHARITY	500.00
MET COMM CHURCH LA P. O. BOX 1374 ABILENE, TX 79604	NONE CHARITABLE	PUBLIC CHARITY	100.00
MIT ALUMNI FUND 600 MEMORIAL DRIVE CAMBRIDGE, MA 02139	NONE CHARITABLE	PUBLIC CHARITY	45,009.00

THE ARZAK FOUNDATION

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MUSEUM OF FINE ARTS 465 HUNTINGTON AVE BOSTON, MA	NONE CHARITABLE	PUBLIC CHARITY	2,500.00
MUSEUM OF FINE ARTS 465 HUNTINGTON AVE BOSTON, MA	NONE CHARITABLE	PUBLIC CHARITY	2,509.00
NANTUCKET ATHENEUM 1 INDIA ST. NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
NANTUCKET COMMUNITY SAILING 4 BATHING BEACH RD NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	909.00
NANTUCKET COTTAGE HOSPITAL 57 PROSPECT ST NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	4,659.00
NANTUCKET HISTORICAL ASSOCIATION 15 BROAD ST. NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
NANTUCKET HISTORICAL ASSOCIATION 15 BROAD ST. NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	790.00
NANTUCKET HISTORICAL ASSOCIATION 15 BROAD ST. NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	950.00
NANTUCKET HISTORICAL ASSOCIATION P. BOX 1016 NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	1,500.00
NANTUCKET HISTORICAL ASSOCIATION P. O. BOX 1016 NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	1,009.00

NANTUCKET LAND COUNCIL 6 ASH LANE NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
NANTUCKET YACHT CLUB FOUNDATION SOUTH BEACH ST. NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
NETIVOT SHALOM CONGREGATION 1316 UNIVERSITY AVE BERKELEY, CA 94702	NONE CHARITABLE	PUBLIC CHARITY	5,500.00
NEW ENGLAND AMATEUR SKATING FOUNDATION P.O. BOX 6881 PROVIDENCE , RI 02940	NONE CHARITABLE	PUBLIC CHARITY	5,000.00
NEW ENGLAND AMATEUR SKATING FOUNDATION P.O.BOX 6881 PROVIDENCE, RI	NONE CHARITABLE	PUBLIC CHARITY	2,500.00
NEW ISRAEL FUND 1101 14TH ST NW WASHINGTON, DC 20005	NONE CHARITABLE	PUBLIC CHARITY	2,000.00
ONE VOICE 1228 15TH ST. SUITE C SANTA MONICA, CA 90404	NONE CHARITABLE	PUBLIC CHARITY	4,750.00
PLANNED PARENTHOOD 1055 COMMONWEALTH AVE BOSTON, MA 02215	NONE CHARITABLE	PUBLIC CHARITY	500.00
SABAN FREE CLINIC 8405 BEVERLY BOULEVARD LOS ANGELES, CA 90048	NONE CHARITABLE	PUBLIC CHARITY	250.00
SAN FRANCISCO OPERA 301 VAN NESS AVE SAN FRANCISCO, CA 94102	NONE CHARITABLE	PUBLIC CHARITY	5,009.00

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SHIRAT HAYAM CONGREGATION 84 SKYLINE DR NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	150.00
SHIRAT HAYAM CONGREGATION 84 SKYLINE DR NANTUCKET, MA 02554	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
SOUTHERN POVERTY LAW 400 WASHINGTON AVE MONTGOMERY , AL 36104	NONE CHARITABLE	PUBLIC CHARITY	500.00
STAND WITH US P. O. BOX 341069 LOS ANGELES, CA	NONE CHARITABLE	PUBLIC CHARITY	500.00
SUSTAINABLE SOUTH BRONX 890 GARRISON AVE BRONX, NY 10474	NONE CHARITABLE	PUBLIC CHARITY	500.00
TEMPLE AKIBA 5249 SEPULVEDA BLVD CULVER CITY, CA 90230	NONE CHARITABLE	PUBLIC CHARITY	1,000.00
TEMPLE ISRAEL 477 LONGWOOD AVE BOSTON, MA 02215	NONE CHARITABLE	PUBLIC CHARITY	5,789.00
TEMPLE ISRAEL 477 LONGWOOD AVE BOSTON, MA 02215	NONE CHARITABLE	PUBLIC CHARITY	20,008.00
TEMPLE ISRAEL 477 LONGWOOD AVE BOSTON, MA 02215	NONE CHARITABLE	PUBLIC CHARITY	20,009.00
TRUSTEES OF RESERVATIONS 572 ESSEX ST. BEVERLY, MA 019151530	NONE CHARITABLE	PUBLIC CHARITY	1,009.00

THE ARZAK FOUNDATION			87-0760799
UNITED WAY OF MASS BAY 51 SLEEPER ST. BOSTON, MA 02210	NONE CHARITABLE	PUBLIC CHARITY	1,009.00
US FIGURE SKATING ASSOCIATION 20 FIRST ST. COLORADO SPRINGS, CO 80906	NONE CHARITABLE	PUBLIC CHARITY	10,000.00
V-DAY 303 PARK AVE SOUTH, SUITE 1184 NEW YORK, NY 10010	NONE CHARITABLE	PUBLIC CHARITY	100.00
VALLEY INTERFAITH COUNCIL 10824 TOPANGA CANYON BLVD #7 CHATSWORTH, CA 91311	NONE CHARITABLE	PUBLIC CHARITY	190.00
WESTERN CENTER ON LAW 3701 WILSHIRE BLVD LOS ANGELES, CA 90010	NONE CHARITABLE	PUBLIC CHARITY	165.00
WGBH LOWELL SOCIETY P. O. BOX 55785 BOSTON, MA 022055875	NONE CHARITABLE	PUBLIC CHARITY	1,509.00
WHITEHEAD INSTITUTE FOR BIOMEDICAL RESEARCH 9 CAMBRIDGE CTR. CAMBRIDGE, MA 02142	NONE CHARITABLE	PUBLIC CHARITY	2,509.00
TOTAL TO FORM 990-PF, PART XV, LINE 3A			422,238.00

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

▶ 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 and click on *e-file for Charities & Nonprofits*.

Type or print	Name of Exempt Organization	Employer identification number
	THE ARZAK FOUNDATION	87-0760799
	Number, street, and room or suite no. If a P.O. box, see instructions	
File by the due date for filing your return. See instructions	C/O ROPES & GRAY LLP, ONE INTERNATIONAL	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	BOSTON, MA 02110-2624	

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

- | | | |
|---|---|------------------------------------|
| ☐ Form 990 | ☐ Form 990-T (corporation) | ☐ Form 4720 |
| ☐ Form 990-BL | ☐ Form 990-T (sec. 401(a) or 408(a) trust) | ☐ Form 5227 |
| ☐ Form 990-EZ | ☐ Form 990-T (trust other than above) | ☐ Form 6069 |
| ☒ Form 990-PF | ☐ Form 1041-A | ☐ Form 8870 |

L. DENNIS SHAPIRO

- The books are in the care of ▶ **24 ESSEX ROAD - CHESTNUT HILL, MA 02467-1317**

Telephone No ▶ **(617) 277-6886**

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 **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ▶ ☒ calendar year **2009** or
- ▶ ☐ tax year beginning _____, and ending _____

- 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	\$	689.13
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	\$	6,293.85
c Balance Due. 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	\$	0.00

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.

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2009)