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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

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

2009

_			be able to use a copy of this			_1
For	calen	dar year 2009, or tax year beginning MAY	1, 2009	, and ending	APR 30, 2010	
G	Check	all that apply Initial return	Initial return of a fo	ormer public charity	Final return	l
		Amended return	Address chan	ge 🛄	Name change	
Us	e the	Name of foundation			A Employer identification	number
	label	THE DONNA AND MARVIN	SCHWARTZ			
	nerwi	se, FOUNDATION			13-7114848	<u> </u>
	print	Number and street (or P O box number if mail is not de	etivered to street address)	Room/suite	B Telephone number	
	r type	p, o heodelicelic a beland	N 605 THIRD	AVENU	(212)509-6	700
	Spe	I City of fown state and ZIP code			C If exemption application is p	ending, check here
ins	ructio	new York, NY 10 <u>158-3</u>	698		D 1 Foreign organizations	s, check here
н	Check	type of organization X Section 501(c)(3) ex	kempt private foundation		2 Foreign organizations me check here and attach co	eeting the 85% test,
	☐ Se		Other taxable private founda	ation	E If private foundation sta	
l F	air ma	rket value of all assets at end of year J Accounti	ng method X Cash	Accrual	under section 507(b)(1)	
(f	rom F	Part II, col (c), line 16)	ther (specify)		F If the foundation is in a	60-month termination
	\$	86237006 • (Part I, colu	mn (d) must be on cash i	basis)	under section 507(b)(1)	
P	art I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
		necessarily equal the amounts in column (a))	expenses per books	income	income	for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc , received			N/A	
	2	Check X if the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	1323943.	1323943.		STATEMENT 1
	5a	Gross rents				
	b	Net rental income or (loss)			,	
đ	6a	Net gain or (loss) from sale of assets not on line 10	4104364.			
Ž	b	Gross sales price for all assets on line 6a 32116815.				
Revenue	7	Capital gain net income (from Part IV, line 2)		4104364.		
ď	8	Net short-term capital gain		· ·		
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	1 .	Less Cost of goods sold			-	
	C	Gross profit or (loss)				
	11	Other income	50900.	7479.		STATEMENT 2
	12	Total Add lines 1 through 11	5479207.	5435786.		
	13	Compensation of officers, directors, trustees, etc	0.	0.		0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
ses	16a	Legal fees				
en	b	Accounting fees STMT 3	40894.	40894.	DEOF	0.
Ä	C .	Other professional fees			RECEI	
ĕ	17	Interest	14239.	14239.	NOV 2 Q	0.
Operating and Administrative Expenses	18	Taxes STMT 4	56729.	47444.	NOV 2 9	2010 O.
nist	19	Depreciation and depletion			THE THE STATE OF T	IRS,
<u> </u>	20	Occupancy			OCD EN	<u> </u>
¥	21	Travel, conferences, and meetings			<u>L_OGDEN</u>	. U [
and	22	Printing and publications	•			
ğ	23	Other expenses STMT 5	19972.	1500.		0.
rat:	24	Total operating and administrative				
e e	.	expenses Add lines 13 through 23	131834.	104077.		0.
O	25	Contributions, gifts, grants paid	3961442.			3961442.
	26	Total expenses and disbursements				
_	<u> </u>	Add lines 24 and 25	4093276.	104077.	ļ	3961442.
_	27	Subtract line 26 from line 12				
σ) A	Excess of revenue over expenses and disbursements	1385931.			
>	4 9	Net investment income (if negative, enter -0-)		5331709.		
-	<u> /c</u>	Adjusted net income (if negative, enter -0-)			N/A	<u> </u>
02-0	501 12-10	LHA For Privacy Act and Paperwork Reduction	Act Notice, see the instruc	tions	114 i-	Form 990-PF (2009)

3

Case - non-enteractorizaning			Balance Sheets Attached schedules and amounts in the description	Beginning of year	End o	fyear
2 2 3 x longs and tempostry cost investments 243	P	art	column should be for end-of-year amounts only			(c) Fair Market Value
243.		1	Cash - non-interest-bearing	211031.	98165.	98165.
Less allowance for coubfful accounts 4 Prilinger receivable Less allowance for doubtful accounts 5 Grants receivable Less allowance for doubtful accounts 5 Grants receivable Less allowance for doubtful accounts 5 Receivable for from others, directors, fusates, and other dosupathol persons 7 Own review deste more/see Less allowance for doubtful accounts 10 Reviewable for size of use 11 Reviewable 12 Investments - composate stock 12 Investments - composate stock 13 Investments - composate stock 14 Land, buildings, and equipment basis 15 Investments - mortigage loans 15 Investments - mortigage loans 16 Grants payable 16 Grants payable 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 10 Less abonutancements 10 Deferred revenue 10 Less abonutancements 11 Mortigages and other notes payable 12 Deferred revenue 12 Less accountancements 13 Total assets (to be completed by all filers) 14 Capital sock (seasonee 15 Total assets (file be completed by all filers) 16 Grants received 17 Commissions that do not foliow SFAS 117, check here 18 Grants payable 19 Deferred revenue 10 Less accountancements 11 Less accountancements 12 Less accountancements 12 Less accountancements 13 Total institutes and net assets fund balances 14 Less accountancements 15 Less accountancements 16 Less accountancements 16 Less accountancements 17 Less accountancements 18 Less accountancements 19 Le		2				
Periodic receivable Less allowance for doubtful accounts Signats receivable Receivable (des from others, directors, trustees, and other disparation of the design		3	Accounts receivable ► 243.			
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Secretaria		4	Pledges receivable ►			
Februaries clusters and other doubth accounts			Less allowance for doubtful accounts			
1		5	Grants receivable			·· · · · · · · · · · · · · · · · · · ·
Page 2 Page 2 Page 3		6	Receivables due from officers, directors, trustees, and other			
Less allowance for doubtul accounts			disqualified persons			
By Prepared expenses and deferred charges 9 Prepared expenses and deferred charges 10a Investments - US and state government obligations 11b Investments - corporate stock 11 Investments - corporate stock 12 Investments - corporate stock 13 Investments - ordoprate bonds 11 Investments - ordoprate bonds 12 Investments - ordoprate bonds 13 Investments - ordoprate bonds 14 Land, buildings, and equipment basis 15 Other assets (describe 16 Total assets (to be completed by all filers) 17 Accounts payable and acrued expenses 18 Grints payable and acrued expenses 19 Destread exemine 20 Leans from ordons, directions, prositions, and order exqualified pensors 21 Total labelities (describe 22 Other labelities (describe 23 Total labelities (describe 24 Univestments - ordoprate by extracted 25 Permanently restricted 26 Permanently restricted 27 Permanently restricted 28 Permanently restricted 29 Permanently restricted 20 Permanently restricted 21 Total restricted 22 Permanently restricted 23 Total labelities and net assets or fund balances 24 One capital surplus, or land, bldg, and equipment fund 25 Permanently restricted 26 Permanently restricted 27 Permanently restricted 28 Permanently restricted 29 Permanently restricted 20 Permanently restricted 20 Permanently restricted 21 Total restricted 22 Permanently restricted 23 Total labelities and net assets or fund balances 30 Total labelities and net assets or fund balances 4 Other increases or fund balances 4 Other increases or fund balances 5 Other increases or fund balances at beginning of year - Part I		7	Other notes and loans receivable			
Prepared expenses and deferred charges Total investments - US and state government obligations STMT 6 S9078789. 60561284. 85113146.			Less allowance for doubtful accounts			
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13 Investments - other STMT 7 1022443. 1025452. 10254						
14 Land, buildings, and equipment basis		Ι.	Cmvm 7	1022442	1025452	1025452
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Part III Analysis of Changes in Net Assets or Fund Balances	t As	29	Retained earnings, accumulated income, endowment, or other funds			
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2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 Decreases not included in line 2 (itemize) ▶ 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 2 1385931. 3 0. 6 61685144.	1			30		60200212
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4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 6 1685144.	_					
5 Decreases not included in line 2 (itemize) ► 5 0. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 61685144.				· · · · · · · · · · · · · · · · · · ·		
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 61685144.						
				nlumn (h) line 30		
	<u>~</u>	· via	described of the balances at one of year time 4 minus into 57 - Falt II, bi	oleran (o), inte oo	, 0	

923511 02-02-10

(a) List and describe the kindigs of property sold (e.g. rasi estate, P-Purchase accurred (mo. day, yr.) 1a' b SEE ATTACHED STATEMENT c d e (e) Gross sales price (f) Deprecation allowed (or allowable) (or allowable) (or allowable) 28012451. Complete only for assasts showing pain in column (h) and owned by the foundation sol 123/169 (i) FMV as of 1231/69 (ii) Adjusted basis (over col. (ii), flam) (iii) Adjusted basis (over col. (iii), flam) 2 Capital gain net income or (net capital loss) (iii) Adjusted basis (over col. (iii), flam) 2 Capital gain net income or (net capital loss) (iii) Adjusted basis (over col. (iii), flam) 2 Capital gain net income or (net capital loss) (ii) FMV as of 1231/69 (iii) Adjusted basis (over col. (iii), flam) 2 Capital gain net income or (net capital loss) (iii) Adjusted basis (over col. (iii), flam) 2 Capital gain net income or (net capital loss) (iii) Adjusted basis (over col. (iii), flam) 2 Capital gain net income or (net capital loss) (iii) Adjusted basis (over col. (iii), flam) 2 Capital gain net income or (net capital loss) (iii) Adjusted basis (over col. (iii), flam) 2 Capital gain net income or (net capital loss) (iii) Adjusted passis (over col. (iii), flam) 2 Capital gain net income or (net capital loss) (iii) Adjusted passis (over col. (iii), flam) 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) 1 gain. also enter in Part I, line 7 1 gain. also enter in Part I, line 7 1 gain. also enter in Part I, line 7 1 gain. also enter in Part I, line 7 2 (over col. (ii), flam) 1 Internation and internation of the capital loss) (iii) Adjusted quality (iii) Adjusted passis (iii) Adjusted quality (iii) Adjusted (iii) Adjusted quality (iii) Adjusted	Part IV Capital Gains	and Los	ses for Tax on Inv	vestmen	t Income						1010	rage
SEE ATTACHED STATEMENT (e) Gross sales price (f) Deprecation allowed (gr allowable) (gr allowab						1. b	- Purc	chase '				
(e) Gross sales price (f) Deprecation allowed (or allowable) (plus expense of sale plus expense of sale (e) plus (f) minus (g) (e) Gross sales price (f) Deprecation allowed (or allowable) (or allowable) (plus expense of sale (e) plus (f) minus (g) (e) plus (f) minus (g) (f) E M V as of 12/31/69 (f) Adjusted basis (f) Excess of con (f) (g) Excess of (g) Excess	1a' '											
(e) Gross sales price (ft) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) plus (t) minus (g) 2 8	b SEE ATTACHED	STAT	EMENT									
(e) Gross sales price (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) plus (f) minus (g) 8 10 11 12 13 11 14 10 14 14 15 15 16 16 17 18 18 18 18 18 18 18 18 18												
(e) Gross sales price (f) Deprecation allowed (or allowable) a b c d g 32116815. Complete only for assets showing gain in column (h) and owned by the foundation on 1231/69 (f) FMV as of 12/31/69 (f) Adjusted basis (h) Excess of col. (i) col. (ii) gain minus (ii) FMV as of 12/31/69 (f) Adjusted basis (iii) Excess of col. (i) col. (iii) gain minus (iii) FMV as of 12/31/69 (f) FMV as of 12/31/69 (f) Adjusted basis (iii) Excess of col. (i) col. (iii) gain minus (iii) FMV as of 12/31/69 (f) Adjusted basis (iii) Excess of col. (i) col. (iii) gain minus (iii) FMV as of 12/31/69 (iii) Gain, also enter in Part I, line 7 (iii) (iii) FMV as of 12/31/69 2 Capital gain net income or (net capital loss) (iii) Gain, also enter in Part I, line 7 (iii) (iii) FMV as of 12/31/69 (iii) Gain, also enter in Part I, line 7 (iii) (iii) FMV as of 12/31/69 (iii) Gain, also enter in Part I, line 7 (iii) Gain, also enter in Part I, line 7 (iii) Gain, also enter in Part I, line 8 (iii) Gain, also enter in Part I, line 8 (iii) Gain, also enter in Part I, line 8 (iii) Gain, also enter in Part I, line 8 (iii) Gain, also enter in Part I, line 8 (iii) Gain, also enter in Part I, line 8 (iii) Gain, also enter in Part I, line 8 (iii) Gain, also enter in Part I, line 8 (iii) Gain, also enter in Part I, line 8 (iii) Gain, also enter in Part I, line 8 (iii) Gain, also enter in Part I, line 8 (iii) Gain, also enter in Part I, line 8 (iii) Gain Gain Gain Gain Gain Gain Gain Gain		·				1					 	
(a) 01035 shirts pintal (b) plus (f) minus (g) a		(f) De	preciation allowed	(n) Co	et or other basis			L_	(h) G	ain or /locc)		
December Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (l) Gains (Col. (h) gain minus (col. (k), but not less than -0-) or Losses (from col. (h)). In any column (h) and owned by the foundation on 12/31/69 (l) Gains (Col. (h) gain minus (col. (k), but not less than -0-) or Losses (from col. (h)). In any column (h) and owned by the foundation on 12/31/69 (l) Gains (Col. (h) gain minus (col. (k), but not less than -0-) or Losses (from col. (h)). In any column (h) and column	(e) Gross sales price	٠,		10,								
E												
d e 32116815 28012451 41043 41043 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (i) fains (col (h) gain minus (oil (k), but not less than -0-) or Losses (from col (h)) if any over col (i), if any ove					·							
Complete only for assets showing gain in column (h) and owned by the foundation of the capital fassis (i) FMIV as of 12/31/69 (i) Adjusted basis (ii) Excess of col (i) over col (j), if any col (iii) Just not less than -0-) or Losses (from col (iii))				·								
(i) FMV as of 12/31/69 (ii) Adjusted basis as of 12/31/69 (iii) Adjusted basis as of 12/31/69 (iv) Excess of col (i) over col (i), if any col (iv) cosses (from col (iv)) over col (ii), fi any col (iv) cosses (from col (iv)) over col (iii), fi any col (iii) cosses (from col (iv)) over col (iii), fi any col (iii) cosses (from col (iv)) over col (iii), fi any col (iii) cosses (from col (iv)) over col (iii), fi any col (iii) cosses (from col (iv)) over col (iii), fi any col (iii) cosses (from col (iv)) over col (iii), fi any col (iii) cosses (from col (iv)) over col (iii), fi any col (iii) cosses (from col (iv)) over col (iii), fi any col (iii) cosses (from col (iv)) over col (iii), fi any col (iii) cosses (from col (iv)) over col (iii) cosses (from col (iii)) over					2801245	1.					41043	364
(I) FMV as of 12/31/69 as of 12/31/69 over col (I), framy lover col (I), framy lover col (II), framy lover col (II), framy lover col (II), framy lover col (III), framy lover col (IIII), framy lover col (III	Complete only for assets showin	g gain in co	olumn (h) and owned by th	ne foundation	n on 12/31/69							
b c d d d d d d d d d d d d d d d d d d	(i) FM V as of 12/31/69							col	k), but i Losses	not less than (from col. (i	1 -0-) or 1))	
c d d e	a											
	b											
Capital gain net income or (net capital loss)	C									_		
2 Capital gain net income or (net capital loss)	d										1101	
2 Capital gain net income or (net capital loss) (if (loss), enter -0- in Part I, line 7) 2 410 43 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 (lot lound (c) if (loss), enter -0- in Part I, line 8 (lot lound (c) if (loss), enter -0- in Part I, line 8 (lot lound (c) if (loss), enter -0- in Part I, line 8 (lot lound (c) if (loss), enter -0- in Part I, line 8 (lot lound (c) if (loss), enter -0- in Part I, line 8 (lot lound (c) if (loss), enter -0- in Part I, line 8 (lot lound (c) if (loss), enter -0- in Part I, line 8 (lot lound (c) if (loss), enter -0- in Part I, line 8 (lot lound (c) if (lot lound (c)	<u>e</u>							1			4104.	364
If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 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 of the 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? If Yes, the foundation does not qualify under section 4940(e). Do not complete this part I Enter the appropriate amount in each column for each year, see instructions before making any entries. (a) Calendar year (or tax year beginning in) Adjusted qualifying distributions Adjusted qualifying distributions Net value of noncharitable-use assets (col. (b) divided by col. (c)) 2008 3336889 78575563 042 2007 5232028 113843899 045 2006 4622535 108643593 045 2005 2601100 114635204 022 2004 2283760 88618318 025 2 Total of line 1, column (d) 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 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 5 Multiply line 4 by line 3	2 Capital gain net income or (net ca	pital loss)	If gain, also enter i	n Part I, line in Part I, line	7 7	}	2		<u> </u>		41043	364
If (loss), enter -0- in Part I, line 8 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? 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 (b) Adjusted qualifying distributions (col (b) divided by col (c)) 2008 3336889 • 78575563 • 0.42 2007 5232028 • 113843899 • 0.45 2006 4622535 • 108643593 • 0.42 2005 2006 4622535 • 108643593 • 0.42 2005 2004 2283760 • 88618318 • 0.25 2 Total of line 1, column (d) 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 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 5 Multiply line 4 by line 3	3 Net short-term capital gain or (los	s) as define	ed in sections 1222(5) and	l (6)								
Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income	•	column (c)								37 / 7		
(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? 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) Calendar year (or tax year beginning in) Adjusted qualifying distributions (b) Adjusted qualifying distributions (co) Net value of noncharitable-use assets. (co) (b) divided by coli (c) 2008 3336889. 78575563. 042 2007 5232028. 113843899. 045 2006 4622535. 108643593. 042 2005 2004 2283760. 114635204. 022 2004 2283760. 88618318. 025 2 Total of line 1, column (d) 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 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 5 Mulltiply line 4 by line 3		ndor So	ction 4940(a) for	Poducod	I Tay on Not	<u> [</u>	3 ootn	nont Inco		N/A		
Calendar year (or tax year beginning in) Adjusted qualifying distributions Net value of noncharitable-use assets Coll (b) divided by col (coll (b) divided by coll (co	Was the foundation liable for the sect	ion 4942 ta fy under se	x on the distributable amo	nplete this pa	<u>irt</u>						Yes 🖸	 No
Calendar year (or tax year beginning in) Adjusted qualifying distributions Net value of noncharitable-use assets Coll (b) divided by coll (c)	(a)				maning any onen				1			
2007 5232028	Base period years Calendar year (or tax year beginnir	ig in)		butions	Net value of no		ritable-	use assets))
2006										· · · · · · · · · · · · · · · · · · ·		, ,
2005 2601100 114635204 2004 2004 2283760 88618318 20025 2 Total of line 1, column (d) 2 179 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 2035 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 4 783418 5 Multiply line 4 by line 3 5 28114	2007											
2004 2283760 . 88618318025 2 Total of line 1, column (d) 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 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 5 Multiply line 4 by line 3	-											
2 Total of line 1, column (d) 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 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 5 Multiply line 4 by line 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 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 5 Multiply line 4 by line 3 5 28114	2004		220	3700.			000	10310			.023) / / .
the foundation has been in existence if less than 5 years 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 5 Multiply line 4 by line 3 5 28114	2 Total of line 1, column (d)								2		.179	9434
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 5 Multiply line 4 by line 3	•	•	•	i line 2 by 5,	or by the number	of ye	ars		3		.03	 5881
5 Multiply line 4 by line 3 5 28114			-	no F								
		16-026 92261	is for 2009 from Part X, iii	16.2					4			
6 Enter 1% of net investment income (1% of Part I, line 27b) 6 533	5 Multiply line 4 by line 3								5		28114	155
I I	6 Enter 1% of net investment incom	e (1% of Pa	art I, line 27b)						6		533	317
7 Add lines 5 and 6 7 28647	7 Add lines 5 and 6								7		28647	772
8 Enter qualifying distributions from Part XII, line 4		,							8		39614	142
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	If line 8 is equal to or greater than See the Part VI instructions	line 7, chec	ck the box in Part VI, line 1	b, and comp	olete that part usin	ig a 1°	% tax	rate				

Pa	rt VI Excise Tax Based on Investment Income (Section 4940)(a), 4	1940(b), 4940(e), or 4	<u>948 -</u>	- see Ir	ıstru	ctio	ns)
1a	Exempt operating foundations described in section 4940(d)(2), check here and en	ter "N/A	A" on line 1					
	Date of ruling or determination letter (attach copy of letter if nece							
,	Domestic foundations that meet the section 4940(e) requirements in Part V, check here			1			533	17.
	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	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Oth	ners en	ter -0-)	2			_	0.
3	Add lines 1 and 2			3			533	17.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Ot	hers er	nter -0-)	4				0.
5	Tax based on investment income Subtract line 4 from line 3 If zero or less, enter -0-			5			533	17.
6	Credits/Payments							
а	2009 estimated tax payments and 2008 overpayment credited to 2009	6a						
	Exempt foreign organizations - tax withheld at source	6b						
	Tax paid with application for extension of time to file (Form 8868)	6c	60000.					
	Backup withholding erroneously withheld	6d						
	Total credits and payments Add lines 6a through 6d		<u>-</u>	7]		600	00.
	Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attack	hed		8				
	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed		•	9				
	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		•	10			66	83.
	Enter the amount of line 10 to be Credited to 2010 estimated tax		6683. Refunded ▶	11				0.
_	rt VII-A Statements Regarding Activities						•	
	During the tax year, did the foundation attempt to influence any national, state, or local legisle	ation o	r did it participate or intervene	ın	Ī		Yes	No
	any political campaign?		• •		Ì	1a		Х
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purpos	es (see	instructions for definition)?			1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and			d or	ľ			
	distributed by the foundation in connection with the activities	•	,					
C	Did the foundation file Form 1120-POL for this year?					10	· ·	X
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the	vear			ľ			
_	(1) On the foundation ▶ \$ 0 • (2) On foundation managers		0.					
е	Enter the reimbursement (if any) paid by the foundation during the year for political expendit							
	managers ▶ \$ 0.		•					
2	Has the foundation engaged in any activities that have not previously been reported to the IR	S?			Ì	2		X
	If "Yes," attach a detailed description of the activities							
3	Has the foundation made any changes, not previously reported to the IRS, in its governing in	nstrume	ent, articles of incorporation, o)[
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the change	s				3		Х
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during the year	?				4a	Х	
b	If "Yes," has it filed a tax return on Form 990-T for this year?					4b	X	
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 eit	her				-		
	By language in the governing instrument, or							
	• By state legislation that effectively amends the governing instrument so that no mandatory	directi	ions that conflict with the state	law				
	remain in the governing instrument?					6	Х	
7	Did the foundation have at least \$5,000 in assets at any time during the year?				ſ	7	Х	
	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 instruction	ıs) 🕨						
	NY					1		
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the At	torney	General (or designate)			ļ		
	of each state as required by General Instruction G? If "No," attach explanation	•	· •			8b	Х	
9	Is the foundation claiming status as a private operating foundation within the meaning of sec	ction 49	942(j)(3) or 4942(j)(5) for cale	ndar	Ī			
	year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," co					9		Х
10	Did any persons become substantial contributors during the tax year? if "Yes," attach a schedul					10	X	

Pa	art 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 51	2(b)(13)? If "Yes," attach schedule (see instructions)	11	j	Х
12	Did the fou	ndation acquire a direct or indirect interest in any applicable insurance contract before			
	August 17	2008?	12		Х
13	Did the fou	ndation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website ad	dress ► N/A			
14		are in care of ▶ FREEDMAN & CO., CPA, P.C. Telephone no ▶ (212)	509	-67	00
	Located at	▶61 BROADWAY SUITE 1405 NEW YORK, NY ZIP+4 ▶10	006	-27	04
15	Section 49	47(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here			
		he amount of tax-exempt interest received or accrued during the year	N	/A	
Pε	art 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) Engag	e in the sale or exchange, or leasing of property with a disqualified person?			
	(2) Borro	w money from, lend money to, or otherwise extend credit to (or accept it from)			
		ualified person?			
		h goods, services, or facilities to (or accept them from) a disqualified person?			
		ompensation to, or pay or reimburse the expenses of, a disqualified person?			
		er any income or assets to a disqualified person (or make any of either available			
		benefit or use of a disqualified person)?			
		to pay money or property to a government official? (Exception. Check "No"			
		oundation agreed to make a grant to or to employ the official for a period after			
		ation of government service, if terminating within 90 days) Yes X No			
h		ver is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
_	-	4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? N/A	1b	1	
		ons relying on a current notice regarding disaster assistance check here			
r	_	ndation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			
٠		first day of the tax year beginning in 2009?	10		Х
2		allure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	100		
-		section 4942(j)(3) or 4942(j)(5))			
2		of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning			
u	before 200				
		the years > , , , ,			
h		ny years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect			
		f assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach			
		- see instructions) N/A	2b		
		sions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	-20		
٠	• • • • • • • • • • • • • • • • • • •	Signs of Section 4342(a)(2) are being applied to unit of the years noted in 2a, list the years note			
22	Did the four	ndation hold more than a 2% direct or indirect interest in any business enterprise at any time			
00	during the				
h	•	I it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after			
L		169, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose			
		s acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,			
	_	no / n	26		
4 -		0, to determine if the foundation had excess business holdings in 2009) N / A ndation invest during the year any amount in a manner that would jeopardize its charitable purposes?	3b		Х
		indation livest during the year any amount in a mainter that would jeopardize its charitable purposes? Indation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	4a		
L		en removed from jeopardy before the first day of the tax year beginning in 2009?	4b		х
	nau noi be	" "	m 990	DE /	
		For	33U	-rr(2009)

Page 6

Part VII-B Statements Regarding Activities for Which F	orm 4720 May Be F	Required (contin	ued)		
5a During the year did the foundation pay or incur any amount to					
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1 4945(e))?	Ye	s X No		
(2) Influence the outcome of any specific public election (see section 4955), o	r to carry on, directly or indire	ectly,			
any voter registration drive?			s X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes	?	Ye	s X No		
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section		_		
509(a)(1), (2), or (3), or section 4940(d)(2)?		Ye	s X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f	or			
the prevention of cruelty to children or animals?		Ye	s X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	ler the exceptions described i	n Regulations			
section 53 4945 or in a current notice regarding disaster assistance (see instru			N/A	5b	
Organizations relying on a current notice regarding disaster assistance check h					
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi		ined			
expenditure responsibility for the grant?		// I 🔲 Ye	s No		
If "Yes," attach the statement required by Regulations section 53.4945	5-5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to					
a personal benefit contract?	•	C Ye	s X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal 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 s	helter transaction?	Ye	s X No		
b. If yes, did the foundation receive any proceeds or have any net income attribute			N/A	7b	
Part VIII Information About Officers, Directors, Trust	ees, Foundation Ma	nagers, Highly	/		
Faid Employees, and Contractors					
1 List all officers, directors, trustees, foundation managers and their	compensation.	1	(4)		
(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	acc) Expense count, other llowances
MARVIN C. SCHWARTZ	TRUSTEE	Cinci o j	compensation	1	
2 EAST 88TH ST					
NEW YORK, NY 10128	0.00	0.	0.		0.
	TRUSTEE				
2 EAST 88TH ST					
NEW YORK, NY 10128	0.00	0.	0.	,	0.
				1	
				1	
2 Compensation of five highest-paid employees (other than those inc	luded on line 1). If none,	enter "NONE."			
(a) Name and address of such ample and a such as a such	(b) Title, and average	(a) Comparation	(d) Contributions to employee benefit plans and deferred	(e	Expense count, other
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deterred compensation	acc	llowances
NONE					
					
Total number of other employees paid over \$50,000			>		0
				000	DE (0000)

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Part VIII Information About Officers, Directors, Trustees, Fou Paid Employees, and Contractors (continued)	indation Managers, Highly	
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 number of organizations and other beneficiaries served, conferences convened, research papers		Expenses
1N/A		
2		
<u> </u>		
3		
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax ye	ear on lines 1 and 2	Amount
1N/A		
2		
All other program-related investments. See instructions		
3		

Total. Add lines 1 through 3

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P	art X Minimum Investment Return (All domestic foundations mu	st complete this par	t Foreign four	ndations, se	e instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable,	etc , purposes			
	Average monthly fair market value of securities	, , , , , , , , , , , , , , , , , , , ,	:	1a	78157931.
b	Average of monthly cash balances		1b	1309820.	
C	Fair market value of all other assets			1c	67143.
d				1 d	79534894.
e	Reduction claimed for blockage or other factors reported on lines 1a and				
	- · · · · · · · · · · · · · · · · · · ·	1e	0.		
2	Acquisition indebtedness applicable to line 1 assets			2	0.
3	Subtract line 2 from line 1d			3	79534894.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, s	ee instructions)		4	1193023.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on F			5	78341871.
6	Minimum investment return Enter 5% of line 5			6	3917094.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and foreign organizations check here	(j)(5) private operatino	foundations ar	id certain	
1	Minimum investment return from Part X, line 6			1	3917094.
2a	· · · · · · · · · · · · · · · · · · ·	_{2a}	53317.		
b	· · · · · · · · · · · · · · · · · · ·	2b	13824.		
C	Add lines 2a and 2b			2c	67141.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	3849953.
4	Recoveries of amounts treated as qualifying distributions			4	0.
5	Add lines 3 and 4			5	3849953.
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 X	III, line 1		7	3849953.
P 1	art XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purpo	nege .			
a		363		1a	3961442.
	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	eto nurnoses		2	
3	Amounts set aside for specific charitable projects that satisfy the	, 010 , parposos		-	
a	Suitability test (prior IRS approval required)			3a	
b				3b	
4	Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and	Part XIII line 4		4	3961442.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net invest				
•	income Enter 1% of Part I, line 27b			5	53317.
6	Adjusted qualifying distributions Subtract line 5 from line 4			6	3908125.
•	Note The amount on line 6 will be used in Part V, column (b), in subsequent years who	en calculating whether	the foundation (<u> </u>	
	4940(e) reduction of tax in those years				. •

Form **990-PF** (2009)

Part XIII Undistributed Income (see instructions)

1 Distributible amount for 2009 from Part XI, line? 2 Understoward received. Also, us of the end of 2009 a Enter amount for 2008 only 5 Total for prior years 5 Co. 3 5 Excess distributions carryover, if any, to 2009 a Finar 2004 b From 2005 c From 2006 6 From 2007 7512.0 c From 2008 6 From 2007 7512.0 c From 2008 7 Total of these 38 throughe 7 7512.0 c From 2008 7 From 2008 7 Total of these 38 throughe 7 7512.0 c From 2008 7 From 2009 7 Total of these 38 throughe 7 7512.0 c From 2008 7 From 2009 7 Total of 2009 throm 2009 throw 2009 throm 2009		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
2 Comparison services with any and the end of 2009 a Enter amount for 2008 only b Total for prior years 3 Excess distributions carryover, if any, to 2009 a From 2004 b From 2005 c From 2006 f From 2007 75120 e From 2006 1 Total of these 3 through e 4 Coupling distributions for 2003 from Part XII, line 4 F \$ 396 1442 a Applied to 2008, but not more than line 2 b Applied to undistributed income of prior years (Electron required - see instructions) c I Treated as distributions convice upones of the 2009 distributions of the 2009 a Secena sheekeening - see instructions) c I Treated as distributions on of corpus (Electron required - see instructions) c I Treated as distributions on of corpus (Electron required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed of of corpus (Electron required - see instructions) d Remaining amount distributed of or of corpus state shown in columns (8) in the columns as indicated below and the down in columns (8) in the columns as indicated below d Secena sheekeening engines and a see instructions d From 2006 d Subtract line & Common for which a notice of deficiency has been assued or on which the section 494(3) tax has been previously assessed d Subtract line & Common for which a notice of deficiency has been assued or on which the section 494(3) tax has been previously assessed d Subtract line & Common for which an onlice of deficiency has been assued or on which the section 494(3) tax has been previously assessed d Subtract line & Transport from 2006 d Subtract line & Transport from 2006 d Subtract line & Transport from 2006 d and applied on the 6 or from 70 8 Excess distributions carryover for 2010. Subtract lines & and 8 from line 6 1 Raleys of line 9 8 Excess from 2006 Excess from 2007 Excess from 2006 Excess from 2007 Excess from 2006 Excess from 2007 Ex	1 Distributable amount for 2009 from Part XI,		'		
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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 d Subtract line 6c from line 6b Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr 1 Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(q)(3) Excess distributions carryover from 2004 not applied on line 5 or line 7 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 186609. 186609. 186609.	b Prior years' undistributed income. Subtract		_		
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deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instructions 1 Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008					
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d Subtract line 6c from line 6b Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr 1 Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008					
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e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008	d Subtract line 6c from line 6b Taxable		•		
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f Undistributed income for 2009 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010. 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3). 8 Excess distributions carryover from 2004 not applied on line 5 or line 7. 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a. 10 Analysis of line 9. a Excess from 2005. b Excess from 2006. c Excess from 2007. d Excess from 2008.	.			_	
lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008				0.	
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7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008					^
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008	The state of the s		-1111-1-1-1		0.
section 170(b)(1)(F) or 4942(g)(3) 8					
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008		0			
not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008					
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008	•	0.1			
Subtract lines 7 and 8 from line 6a 186609. 10 Analysis of line 9 a Excess from 2005 b Excess from 2007 c Excess from 2007 d Excess from 2008	· · · · · · · · · · · · · · · · · · ·	•			
10 Analysis of line 9 a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008		186609			
a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008	F				
b Excess from 2006 c Excess from 2007 d Excess from 2008					
t Excess from 2007 75120 • d Excess from 2008					
d Excess from 2008				1	
e Eyress from 2009 111489 a	d Excess from 2008				
0 EA0000 HOIR 2000 2 2 2 2 0 0 1	e Excess from 2009 111489.				

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Form **990-PF** (2009)

Form 990-PF (2009) FOUNDAT					14848 Page 10
Part XIV Private Operating For	oundations (see ins	structions and Part V	I-A, question 9)	N/A	
1 a If the foundation has received a ruling or	r determination letter that	it is a private operating			
foundation, and the ruling is effective for		7	▶		
b Check box to indicate whether the found		ig foundation described		4942(J)(3) or4	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		<u> </u>
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					
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	<u> </u>				
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 Info	rmation (Comple	te this nart only	if the foundation	had \$5 000 or m	ore in assets
at any time during t			ii tile loulidation	παα ψο, σοσ σι πι	ore in assets
1 Information Regarding Foundatio		•		 -	
a List any managers of the foundation who		than 2% of the total con	tributions received by the	foundation before the clo	ose of any tax
year (but only if they have contributed in	nore than \$5,000) (See s	ection 507(d)(2))			
SEE STATEMENT 8					
b List any managers of the foundation who other entity) of which the foundation has			(or an equally large portion	on of the ownership of a p	partnership or
NONE	· ·				
2 Information Regarding Contributi	on Grant Gift Loan	Scholarchin etc. D	rograme:		
Check here ► X if the foundation of the foundation makes gifts, grants, etc.	nly makes contributions t	to preselected charitable	organizations and does r		
	·			Janpioto 1,01113 24, U, C, 411	
a The name, address, and telephone numl	ber of the person to whol	n applications should be	, addressed		
b The form in which applications should b	a submitted and informat	tion and materials they	· · · · · · · · · · · · · · · · · · ·		
b The form in which applications should b		uon and materials they s		· 	
c Any submission deadlines					
d Any restrictions or limitations on awards	s, such as by geographic	al areas, charitable fields	, kinds of institutions, or	other factors	
		·-··			
923601 02-02-10					Form 990-PF (2009)

FOUNDATION

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Part XV Supplementary Information				T
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	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		
a Paid during the year MISC - FROM PASS THRU ACTIVITY	NONE		CHARITABLE CONTRIBUTIONS	497.
SEE ATTACHED SCHEDULE	NONE		CHARITABLE CONTRIBUTIONS	3960945.
Total			▶ 3a	3961442.
to Approved for future payment			3a	3901442.
NONE				
Total 923611 02-02-10			<u>▶ 3b</u>	0 . orm 990-PF (2009)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated bu	siness income		ed by section 512, 513, or 514	(e)
Program service revenue	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
•	code		1000	· · · · · · · · · · · · · · · · · · ·	
a b	-		+-+		· · · · · · · · · · · · · · · · · · ·
	1 1		 	<u>-</u>	
C			+		
d			+ +		
e			t - t		
g Fees and contracts from government agencies	_		 		
2 Membership dues and assessments			 		
3 Interest on savings and temporary cash			\dagger		
investments					
4 Dividends and interest from securities			 		1323943
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property					
7 Other investment income	523000	43421.			7479
8 Gain or (loss) from sales of assets other	======				
than inventory			1 1		4104364
9 Net income or (loss) from special events				-	
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b	i l			 	
C	i I				
d	i I				
e					
12 Subtotal Add columns (b), (d), and (e)		43421.		0.	5435786
13 Total Add line 12, columns (b), (d), and (e)		· · -		13	5479207
(See worksheet in line 13 instructions to verify calculations	;)				
Part XVI-B Relationship of Activitie		olishment of E	kempt	Purposes	
Line No Explain below how each activity for which i	ncome is reported in co	lumn (e) of Part XVI-A	contribi	uted importantly to the accom	plishment of
▼ the foundation's exempt purposes (other to				, ,	
4 THROUGH NEUBERGER & E	BERMAN				
8 SCHEDULE ATTACHED					
7 THROUGH K1 INVESTMENT	AND DIAMO	ND OFFSHOR	RE DE	RILLING INC S	UB PAYMENT

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

1	Did th	e organization directly or indi	rectly engage in any of the followi	ing with any other organization	n described in section 501(c) of		Yes	No
•	the Co	ode (other than section 501(c))(3) organizations) or in section 5	527, relating to political organi	zations?			
а	Trans	fers from the reporting founda	ation to a noncharitable exempt o	rganization of				
	(1) 0	ash				1a(1)		_X_
	(2) (Other assets				1a(2)		X
b	Other	transactions						
		ales of assets to a noncharital	· · · · · · · · · · · · · · · · · · ·			1b(1)		X
			ncharitable exempt organization			1b(2)		X
		lental of facilities, equipment,				1b(3)		X
		leimbursement arrangements				1b(4)		X
		oans or loan guarantees				1b(5)		X
_			mbership or fundraising solicitati			1b(6)		X
			iling lists, other assets, or paid er	• •		1c		
a					rays show the fair market value of the goods, of e in any transaction or sharing arrangement, sh		ets,	
			other assets, or services received		e in any transaction or snaming arrangement, sn	UW III		
a)	Line no	(b) Amount involved	(c) Name of noncharitab		(d) Description of transfers, transactions, and si	nanno arr	anceme	nte
-,		(B) mount involved	N/A		(a) bescription of nariotes, barrocoloris, and si	icaning an	angeme	
			117, 41					
						• •		
				·		•		
				···		•		
						· -·		
				· · · · · · · · · · · · · · · · · · ·			•	
		-		···			_	
2a	Is the	foundation directly or indirect	tly affiliated with, or related to, on	e or more tax-exempt organiz	ations described			
			r than section 501(c)(3)) or in sec	·		Yes	X	No
b		s," complete the following sch						
		(a) Name of org	anization	(b) Type of organization	(c) Description of relationsh	ıp		
		N/A						
			····					
_								
			ave examined this return, including acc or than taxpayer or fiduciary) is based or		ents, and to the best of my knowledge and belief, it is to has any knowledge	ue, correc	ot,	
	and con	Dan le	A man taxpayer or indecidity, is based of	ar mornation of which preparer	, ,			
.	1	VI Mayell	way	11/20/10	TRUSTEE			
֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓	Sı	gnature of officer or trustee	<i>U</i>	Date "	Title			
֡֡֞֞֞֞֜֞֡֞֡֞֜֜֡֡	v _	Preparer's			ate Check If Preparer'	s identify	ing num	iber
ร์	힐호		J. FREEDMAN		1/19/10 self- employed ► □			
	Paid Preparer's Use Only	· · · · ·	DMAN & CO., CPA	A, P.C.	EIN ►	_		
	₹ ņ		ROADWAY					
		address and ZIP code NEW	YORK, NY 10006		Phone no 21250			
					For	m 990	-PF(2009)

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CONTINUATION FOR 990-PF, PART IV 13-7114848 PAGE 1 OF 1

Part IV	Capital Gains and Loss	es for Tax on Investment Income		- T		
	2-story brid	describe the kind(s) of property so k warehouse, or common stock, 2	200 shs MLC Co	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(mo , day, yr)
1a N&B			E ATTACHED	P		VARIOUS
			E ATTACHED	P		VARIOUS
	M PASS THRU			P		VARIOUS
	M PASS THRU			P		VARIOUS
	IGATION SETT	,		P	VARIOUS	VARIOUS
f CAP	ITAL GAINS D	IVIDENDS				
g						
h			····		ļ	
1						
1					-	
<u>k</u>						<u> </u>
					<u> </u>	
<u>m</u>						
<u>n</u>						
0		(6) Depression allowed	(a) Cost or other hasis) Gain or (loss)	l
(e) (Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale) Gain or (loss) plus (f) minus (g)	
	21461508.	(17101806.	(9)	. , ,	4359702.
<u>a</u>	10645822.		10893912.			<248090.
<u>b</u>	10045022.		15885.	_		<15885.
<u>c</u> d			848.			<848.
e	8122.					8122.
f	1363.					1363.
g		· · · · · · · · · · · · · · · · · · ·				
h						
<u> </u>					·	
k						
1						
m						
n						<u> </u>
0						
Comple	ete only for assets showing	gain in column (h) and owned by	-T	(I) Los	sses (from col (h)) (1+)
(ı) F N	/IV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	but r	of col (h) gain ove not less than "-0-")	
<u>a</u>						4359702.
<u>b</u>						<248090.
<u>c</u>						<15885.
<u>d</u>						<848.
<u>e</u>			<u> </u>			8122. 1363.
<u> </u>						1303.
9			 			
<u>h</u>			-			
1		, , , , , , , , , , , , , , , , , , , 	 			
<u></u>			-			
<u>k</u>			-			
<u>1</u>			 			
<u>m</u>						
0						
<u>v</u>						-
2 Capital o	gain net income or (net cap	oital loss) { If gain, also enter	er in Part I, line 7 -0-" in Part I, line 7	2		4104364.
			`			
	rt-term capital gain or (los: also enter in Part I, line 8, c	s) as defined in sections 1222(5) a column (c))			
	, enter "-0-" in Part I, line 8		J	3	N/A	

FORM 990-PF DIV	IDENDS AND	INTER	EST FROM	SECU	URITIES	STATEM	IENT	1
				CAI	PITAL GAINS	COLUM	INI (A	`
SOURCE		GROSS	AMOUNT		DIVIDENDS		UNT	,
DIVIDEND INCOME FROM PAS	S THRU	-	4465				4.4.4	
ACTIVITY NEUBERGER BERMAN (#: 523	-77029)		4465. 1320841.		0. 1363.	1	446 3194	
TOTAL TO FM 990-PF, PART	I, LN 4		1325306.		1363.	1	32394	13.
FORM 990-PF	0'	THER I	NCOME			STATEM	IENT	2
DESCRIPTION			(A) REVENUE PER BOOKS		(B) NET INVEST- MENT INCOME	ADJ	C) USTEI INCON	
ORDINARY INCOME FROM PASS ACTIVITY SUBSTITUE PAYMENTS INTEREST INCOME FROM PASS				497. 950.				
ACTIVITY ORDINARY INCOME FROM PAS:				032.				
ACTIVITY				421.				
TOTAL TO FORM 990-PF, PA	RT I, LINE	11 =	509	900.	7479	• =	<u>.</u>	
FORM 990-PF	AC	COUNTI	NG FEES			STATEM	IENT	3
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INVI MENT INC		(C) ADJUSTED NET INCOM		(D) RITAI RPOSI	
PROFESSIONAL FEES		40894.	4 (0894	•		<u></u>	0.
TO FORM 990-PF, PG 1, LN	16B	40894.	40	 0894	•			0.

FORM 990-PF	TAX	ES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS		ST-	(C) ADJUSTED NET INCOM	CHARITA	
FEDERAL EXCISE TAX FOREIGN TAX	9285. 47444.	47	0. 444.			0.
TO FORM 990-PF, PG 1, LN 18 =	56729.	47	444.			0.
FORM 990-PF	OTHER E	XPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC	ST-	(C) ADJUSTED NET INCOM	CHARITA	
OTHER EXPENSES FROM PASS THRU ACTIVITY FILING FEE	18472. 1500.		0. 500.			0.
TO FORM 990-PF, PG 1, LN 23	19972.	1	500.			0.
FORM 990-PF	CORPORAT	E STOCK		· <u>· · · · · · · · · · · · · · · · · · </u>	STATEMENT	6
DESCRIPTION			B00:	K VALUE	FAIR MARKE VALUE	Т
SEE ATTACHED SCHEDULE COST BASIS ADJUSTMENTS		•	, , , , , ,	60685362. <124078.>	851131	46.
TOTAL TO FORM 990-PF, PART II	, LINE 10B	:		60561284.	851131	46.
FORM 990-PF	OTHER INV	ESTMENTS			STATEMENT	7
DESCRIPTION		LUATION ETHOD	В00	K VALUE	FAIR MARKE VALUE	T
DUE FROM BROKER		COST		1025452.	10254	52.
		•				

ATTACHMENT - INVESTMENTS (INVENTORY) - CORPORATE STOCK

Date			Cost Basis	Market Value
Purchased	Quantity	Securities	Total	Total
VARIOUS	47,500	ABBOTT LABORATORIES	2,077,437.36	2,430,100.00
VARIOUS	70,000	ALLIANCEBERNSTEIN HOLDING LP	1,335,122.96	2,197,300.00
1/29/2010	20,000	AMGEN INC	1,116,000 00	1,146,200.00
VARIOUS	245,000	ANADARKO PETROLEUM CORP	5,678,618 13	15,229,200.00
2/12/2010	25,000	ANNALY CAPITAL MANAGEMENT INC	433,231 11	423,750 00
VARIOUS	41,000	ASSURANT INC	1,284,744 28	1,493,630.00
VARIOUS	70,000	COMCAST CORP	1,141,424.63	1,319,500.00
VARIOUS	110,000	D R HORTON INC *	1,011,191.21	1,615,900.00
3/21/2007	50,000	DEEP SEA SUPPLY PLC	77,301.28	102,875.00
8/21/2009	20,000	DELPHI FINANCIAL GROUP INC	420,064.27	550,000.00
VARIOUS	136,520	DEVON ENERGY CORPORATION NEW	1,734,743.55	9,191,891.60
9/15/2006	10,000	DIAMOND OFFSHORE DRILLING INC	701,160.00	791,000.00
VARIOUS	70,000	ENSCO INTERNATIONAL INC	4,507,781.30	3,302,600.00
2/18/2010	28,800	EOG RES INC	2,571,632.64	3,229,056.00
1/7/2010	50,000	GLG PARTNERS INC	169,312.05	162,000.00
4/20/2009	1,005	GOLDMAN SACHS GROUP INC	118,497.54	145,926.00
VARIOUS	90,500	HEWLETT PACKARD CO	3,172,202.90	4,703,285.00
VARIOUS	45,000	INTERNATIONAL BUSINESS MACHINES CORP	5,405,222.22	5,805,000.00
1/28/2010	15,000	JPMORGAN CHASE & CO	593,211.00	638,700.00
2/3/2010	11,500	LABORATORY CORP AMER HLDGS	825,448.15	903,555.00
10/15/2009	10,000	LOEWS CORPORATION	351,939.00	372,400.00
11/5/2008	9,500	METHANEX CORP	114,578.25	220,210.00
VARIOUS	28,630	METLIFE INC	1,100,168.11	1,304,955.40
9/22/2009	100,000	NORTHERN OFFSHORE	121,872.67	216,760.00
VARIOUS	16,500	OCCIDENTAL PETE CORP	1,203,974.15	1,462,890.00
9/15/2009	25,000	PIONEER NATURAL RESOURCES CO	792,383.08	1,603,250 00
VARIOUS	12,500	PROSHARES TR ULTRA FINANCIALS NEW	396,590.46	878,625.00
4/8/2010	135,000	PULTEGROUP INC	1,543,389.80	1,767,150.00
9/8/2009	42,500	SYMANTEC CORPORATION	699,072.49	712,725.00
2/28/2008	453,650	TALISMAN ENERGY INC	7,591,586.11	7,730,196.00
7/16/2009	4,500	TORCHMARK CORP	156,630.15	240,930.00
VARIOUS	48,000	TRAVELERS COMPANIES INC THE	1,807,349.69	2,435,520.00
VARIOUS	26,500	TSAKOS ENERGY NAVIG USD1	405,613.71	387,960.00
VARIOUS	134,000	VALIDUS HOLDINGS LTD	3,194,204.38	3,426,380.00
VARIOUS	23,000	WHITING PETROLEUM CORPORATION	808,348.80	2,077,590.00
VARIOUS	294,000	XEROX CORP	4,351,285 12	3,204,600.00
VARIOUS	183,446	NEUBERGER BERMAN INCOME FDS NEW HIGH INCOME BD FD INV CL	1,672,029.75	1,689,536.00
		TOTAL	60,685,362.29	85,113,146.00

FORM 990-PF

PART XV - LINE 1A LIST OF FOUNDATION MANAGERS STATEMENT 8

NAME OF MANAGER

MARVIN C. SCHWARTZ DONNA SCHWARTZ

THE DONNA & MARVIN SCHWARTZ FOUNDATION

EIN: 13-7114848

PERIOD ENDED: 04/30/2010

CONTRIBUTIONS PAID ATTACHMENT

2	
<u>Descriptions</u>	Amount
Alzheimer's Association - New York City Chapter	500.00
American Council Of Trustees & Alumni	10,000.00
American Folk Art Museum	51,550.00
American Friends Of The Israel Museum	5,000.00
American Museum Of Natural History	25,000.00
Arts Connection	8,000.00
Baruch College Fund	52,700.00
Bedford Audubon Soceity	2,000.00
Bedford Fire Dept	1,000.00
Bedford Historical Society	2,000.00
Bedford Riding Lanes Association	6,000.00
Beth Israel Foundation, Inc.	35,000.00
Beth Israel Med. Center	10,000.00
Carnegie Hill Neighbors	4,900.00
CCFA	7,500.00
Central Park Conservancy	148,500.00
CHESS-IN-THE-SCHOOLS	5,000.00
CPC Storm Damage Fund	5,000.00
Damon Runyon Cancer Research Fund	4,408.50
Diabetes Research Institute Fdn	3,000.00
East End Hospice	3,000.00
East Side House Settlement	3,000.00
Eastport Fire Dept	200.00
Emory University	250,000.00
F.E.G.S.	5,000.00
Family Counseling Services	31,000.00
FIDELITY CHARITABLE GIFT FUND	400,000.00
Friends of Westhampton Ambulance	100.00
Full Moon Arts Center	5,000.00
Global Sports Development	10,000.00
Harrison PBA	1,000.00
Historic Hudson Valley	50,000.00
International Rescue Committee	5,000.00
Juvenile Diabetes Research Foundation	2,500.00
Lincoln Center For The Performing Arts	10,000.00
Manhattan Institute	22,850.00
Manhattan Institute For Policy Research	22,850.00
Manhattan Theater Club	7,000.00
Metropolitan Museum Of Art	75,000.00
Mount Sinai Crystal Ball	10,000.00
National Wildlife Federation	10,000.00
Neuberger Museum Of Art	63,300.00
New Jersey Symphony Orchestra	10,000.00
New York City Opera	9,500.00
New York Hall Of Science	5,000.00
New York Historical Society	22,500.00
New York Junior Tennis League	24,371.00
New York Philharmonic Orchestra	134,600.00
New York Restoration Project	7,500.00
New Yorkers For Parks	1,580.00
North Salem Open Land Foundation	2,000.00
North Salem Volunteer Ambulance Corp	100.00
North Shore University Hospital	4,000.00
ORT America	2,500.00
PEF Israel Endowment Funds, Inc	25,000.00
Pet Alive	500.00

10/22/2010 10:23 AM 1 of 2

THE DONNA & MARVIN SCHWARTZ FOUNDATION

EIN: 13-7114848

PERIOD ENDED: 04/30/2010

CONTRIBUTIONS PAID ATTACHMENT

<u>Descriptions</u>	Amount
Phoenix House	7,000.00
Playwrights Horizons	1,905.00
Remsenburg Academy Association Inc	2,150.00
Responsible Solutions For Value Pets	1,000.00
Rothko Chapel	6,000.00
Rubin Museum Of Art	8,000.00
Sabin Vaccine Institute	25,000.00
Sargent Shriver National Center On Poverty Law	10,000.00
Seventh Regiment Armory Conservancy, Inc.	50,000.00
Shelburne Museum	74,500.00
The Actors Fund Of America	3,000.00
The Campaign Store	4,000.00
The Clarion Fund	5,000.00
The Doe Fund	97,800.00
The Glaucoma Foundation	25,000.00
The Jewish Foundation For the Righteous	15,000.00
The Metropolitan Museum Of Art	8,635.00
The Metropolitan Opera	229,300.00
The Museum Of Arts & Design	100,000.00
The Museum Of Modern Art	10,000.00
The New York Botanical Gardens	60,870.00
The School For Strings	1,500.00
The Wall Street Synagogue	250.00
Town Of Bedford PBA	2,000.00
Trustees Of U Penn	1,010.00
UJA Of MetroWest	10,000.00
United Jewish Appeal Of Metrowest	10,000.00
United Negro College Fund	2,000.00
United States Holocaust Memorial Museum	25,000.00
Westchester Land Trust	127,500.00
Westhampton Beach Performing Arts Center	100,000.00
Whitney Museum Of American Art	9,515.00
WIRE TO JEWISH COMMUNAL FUND	1,300,000.00
Wolf Conservation Center	5,000.00
OVERALL TOTAL	3,960,944.50

10/22/2010 10:23 AM 2 of 2

EIN: 13-7114848

DONNA AND MARVIN SCHWARTZ FOUNDATION NEUBERGER BERMAN - ACCT 523-77029 4/30/2010

CLIENT # 1432

Capital Purchase PROFIT & LOSS - BOOK BASIS SHORT TERM **6**

SHUR! IERM		rucuase			Capital
Date	(Sold) Securities	Date	Cost Basis	Proceeds	Gain (Loss)
6/2/2009	(2,500.00) ABBOTT LABORATORIES	4/22/2009	109,338.81	112,807.34	3,468.53
6/2/2009	(25,000.00) INGERSOLL RAND CO LTD CL A	6/12/2008	982,195.40	537,378.33	(444,817.07)
6/2/2009	(3,500.00) WILLIS GROUP HOLDINGS LTD	3/19/2009	77,545.42	97,777.33	20,231.91
6/10/2009	(45,000.00) SEADRILL LTD	10/17/2008	359,589.64	662,892.63	303,302.99
7/28/2009	(53,500.00) SEADRILL LTD	10/22/2008	427,512.13	841,800.11	414,287.98
7/28/2009	(60,000.00) SEADRILL LTD	10/22/2008	479,452.85	949,938.03	470,485.18
8/12/2009	(100,000.00) UNILEVER N V	VARIOUS	2,400,175.71	2,797,493.98	397,318.27
8/26/2009	(20,000.00) METHANEX CORP	11/5/2008	241,217.37	334,272.74	93,055.37
9/3/2009	(100,000.00) PETROLEO BRASILEIRO SA (PETROBRAS) SPONSORED ADR	12/11/2008	1,617,341.50	3,338,163.14	1,720,821.64
9/8/2009	(34,500.00) PROSHARES TRUST ULTRA FINANCIALS PROSHARES	3/24/2009	102,385.16	194,227.87	91,842.71
11/18/2009	(25,000.00) WILLIS GROUP HOLDINGS LTD	VARIOUS	553,895.83	697,791.97	143,896.14
12/2/2009	(10,000.00) RALCORP HOLDINGS INC NEW	3/19/2009	562,115.00	572,290.27	10,175.27
12/2/2009	(30,000.00) SYMANTEC CORPORATION	9/8/2009	451,564.16	533,508.31	81,944.15
12/2/2009	(21,500.00) WILLIS GROUP HOLDINGS LTD	4/14/2009	476,350.41	586,039.01	109,688.60
12/2/2009	(100.00) EOG RES INC	8/17/2009	7,414.51	8,608.78	1,194.27
12/3/2009	(5,000.00) LOCKHEED MARTIN CORP	8/27/2009	375,177.50	383,094.14	7,916.64
12/3/2009	(9,500.00) PROSHARES TRUST ULTRA FINANCIALS PROSHARES	6/8/5009	49,193.76	51,622.50	2,428.74
12/3/2009	(10,000.00) RALCORP HOLDINGS INC NEW	3/19/2009	562,115.00	571,111.30	8,996.30
12/3/2009	(25,000.00) WILLIS GROUP HOLDINGS LTD	4/14/2009	553,895.83	672,449.13	118,553.30
12/8/2009	(7,500.00) SYMANTEC CORPORATION	6002/8/6	112,891.04	135,562.40	22,671.36
1/13/2010	(30,000.00) LENNAR CORP	11/30/2009	391,592.85	467,303.85	75,711.00
1/28/2010	(50,000.00) LOCKHEED MARTIN CORP	VARIOUS	3,619,776.25	3,839,931.20	220,154.95
2/3/2010	(3,500.00) ACE LIMITED	7/16/2009	150,610.60	172,802.95	22,192.35
2/3/2010	(1,200.00) STARWOOD PROPERTY TRUST INC	8/17/2009	23,823.96	23,536.74	(287.22)
2/3/2010	(25,000.00) WILLIS GROUP HOLDINGS PLC	3/19/2009	537,601.96	655,703.56	118,101.60
3/8/2010	(10,000.00) OMNICOM GROUP INC	2/4/2010	358,289.33	374,816.23	16,526.91
3/10/2010	(10,000.00) OMNICOM GROUP INC	2/4/2010	358,289.33	377,508.19	19,218.86
4/16/2010	(33,000.00) BANK OF AMERICA CORP	VARIOUS	488,631.31	612,804.13	124,172.82
4/29/2010	(33,500.00) UNUM GROUP	2/3/2010	671,823.46	858,271.58	186,448.12

4,359,701.67

21,461,507.74

17,101,806.07

TOTAL SHORT-TERM

EIN: 13-7114848

CLIENT # 1432

PROFIT & LOSS - BOOK BASIS

LONG TERM

		Purchase			Capital
Date	(Sold) Securities	Date	Cost Basis	Proceeds	Gain (Loss)
6/2/2009	(20,000.00) XEROX CORP	7/28/2005	367,164.38	140,030.00	(227,134.38)
6/10/2009	(55,000.00) SEADRILL LTD	VARIOUS	851,958.47	810,202.10	(41,756.37)
7/28/2009	(58,000.00) JARDEN CORPORATION	VARIOUS	1,099,308.90	1,403,157.04	303,848.14
9/2/2009	(5,000.00) COMCAST CORP (USE N&B)	3/29/2004	90,577.94	73,574.26	(17,003.68)
12/3/2009	(19,475.00) INGERSOLL RAND CO LTD CL A	6/12/2008	861,412.94	680,453.96	(180,958.98)
12/3/2009	(9,100.00) ANADARKO PETROLEUM CORP	6/12/2003	258,336,71	537,512.25	279,175.55
2/3/2010	(25,000.00) INGERSOLL RAND CO LTD CL A	6/5/2008	991,200.90	830,140.69	(161,060.21)
2/3/2010	(20,000.00) XTO ENERGY	7/25/2008	1,055,742.60	905,588.48	(150,154.12)
2/18/2010	(50,000.00) XTO ENERGY	7/25/2008	2,639,356.50	2,257,239.83	(382,116.67)
4/8/2010	(77,000.00) TALISMAN ENERGY INC	3/4/2008	1,376,748.87	1,385,152.81	8,403.94
4/29/2010	(6,000.00) ALLIANCEBERNSTEIN HOLDING LP	12/19/2008	117,835.92	198,660.83	80,824.91
4/29/2010	(3,400.00) WHITING PETROLEUM CORPORATION	VARIOUS	121,845.64	293,688.05	171,842.41
4/29/2010	(19,500.00) D R HORTON INC *	1/3/2003	168,429.92	269,850.34	101,420.42
4/29/2010	(50,000.00) TALISMAN ENERGY INC	3/4/2008	893,992.77	860,571.32	(33,421.45)
TOTAL LONG-TERM	XX		10.893.912.46	10 645 821 96	(7248 090 50)
			21 :12 2/22/22	2012/21/21	1000000

TOTAL

27,995,718.53 32,107,329.70 4,111,611.17

J-\Schwartz Foundation\050109 to 043010\1432 THE DONNA & MARVIN SCHWARTZ FOUNDATION TAX WORK SHEETS - YE 043010Cap Gain - Book

Form **8868**

(Rev April 2009)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

► File a separate application for each return

OMB No 1545-1709

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an exte	orm 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.	<u>.</u>
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 exte	÷
	▶
to file income tax returns	ension of time
Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consoling you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing conversely and click on e-file for Charities & Nonprofits	ıf (1) you want the addıtıonal dated Form 990-T Instead,
print THE DONNA AND MARVIN SCHWARTZ	ployer identification number
File by the due date for Number, street, and room or suite no. If a P.O. box, see instructions.	13-7114848
filing your return See C/O NEUBERGER & BERMAN 605 THIRD AVENUE	
City, town or post office, state, and ZIP code. For a foreign address, see instructions NEW YORK, NY 10158-3698	
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 X Form 990·PF Form 1041·A Form 8870	
TOTAL SOURCE CONTROL OF THE POINT SOURCE CONTROL OF THE PO	
FREEDMAN & CO., CPA, P.C. The books are in the care of 61 BROADWAY SUITE 1405 NEW YORK, NY - 1000 Telephone No (212) 509-6700 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	
FREEDMAN & CO., CPA, P.C. The books are in the care of 61 BROADWAY SUITE 1405 NEW YORK, NY - 100 Telephone No (212) 509-6700 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	for the whole group, check this abers the extension will cover
FREEDMAN & CO., CPA, P.C. The books are in the care of 61 BROADWAY SUITE 1405 NEW YORK, NY - 1000 Telephone No (212) 509-6700 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 box If it is for part of the group, check this box and attach a list with the names and EINs of all memoral interpretation in the interpretation of time untiles and the organization in the organization in the organization in the organization named above is for the organization's return for calendar year or	for the whole group, check this abers the extension will cover
FREEDMAN & CO., CPA, P.C. The books are in the care of ▶ 61 BROADWAY SUITE 1405 NEW YORK, NY − 100 Telephone No ▶ (212) 509−6700 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 fow ▶ If it is for part of the group, check this box ▶ and attach a list with the names and EINs of all mem 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until DECEMBER 15, 2010, to file the exempt organization return for the organization named above is for the organization's return for □ calendar year or □ and ending APR 30, 2010 2 If this tax year is for less than 12 months, check reason: □ Initial return □ Final return 3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any	or the whole group, check this abers the extension will cover The extension Change in accounting period
FREEDMAN & CO., CPA, P.C. The books are in the care of 61 BROADWAY SUITE 1405 NEW YORK, NY - 1000 Telephone No (212) 509-6700 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 fox If it is for part of the group, check this box 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until DECEMBER 15, 2010, to file the exempt organization return for the organization named above is for the organization's return for 1 Calendar year or 1 Trequest an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until DECEMBER 15, 2010, to file the exempt organization return for the organization named above is for the organization's return for 1 Trequest an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until DECEMBER 15, 2010, and ending APR 30, 2010 2 If this tax year is for less than 12 months, check reason: Initial return Final return 3 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	or the whole group, check this abers the extension will cover. The extension Change in accounting period
FREEDMAN & CO., CPA, P.C. The books are in the care of 61 BROADWAY SUITE 1405 NEW YORK, NY - 10 Telephone No (212) 509-6700 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 a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for box if it is for part of the group, check this box and attach a list with the names and EINs of all mem 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until DECEMBER 15, 2010, to file the exempt organization return for the organization named above is for the organization's return for	for the whole group, check this abers the extension will cover The extension Change in accounting period \$ 60000
FREEDMAN & CO., CPA, P.C. The books are in the care of 61 BROADWAY SUITE 1405 NEW YORK, NY - 1000 Telephone No (212) 509-6700 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 flow If this is for part of the group, check this box and attach a list with the names and EINs of all mem of the organization of time untiled to file Form 990-T) extension of time untiled DECEMBER 15, 2010, to file the exempt organization return for the organization named above is for the organization's return for calendar year or X tax year beginning MAY 1, 2009, and ending APR 30, 2010 If this tax year is for less than 12 months, check reason: Initial return Final return 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 If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated	for the whole group, check this abers the extension will cover The extension Change in accounting period \$ 60000