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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

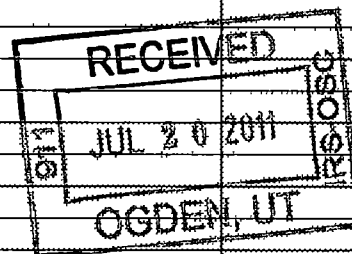
Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2009, or tax year beginning JUL 1, 2009, and ending JUN 30, 2010

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 U&R Foundation		A Employer identification number 52-2283939
	C/O Wagshal		B Telephone number 718-384-4160
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite 471 Bedford Ave		C If exemption application is pending, check here ☐
City or town, state, and ZIP code Brooklyn, NY 11211			D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1460213.		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____	
		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	70000.			
2	Check ☐ if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities				
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.		
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	8890.	8890.	8890.	
12	Total. Add lines 1 through 11	78890.	8890.	8890.	
13	Compensation of officers, directors, trustees, etc.	0.	0.	0.	0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees Stmt 2	2550.	0.	0.	0.
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 Stmt 3	129.	0.	0.	0.
24	Total operating and administrative expenses. Add lines 13 through 23	2679.	0.	0.	0.
25	Contributions, gifts, grants paid	54034.			54034.
26	Total expenses and disbursements. Add lines 24 and 25	56713.	0.	0.	54034.
27	Subtract line 26 from line 12	22177.			
a	Excess of revenue over expenses and disbursements				
b	Net investment income (if negative, enter -0-)		8890.		
c	Adjusted net income (if negative, enter -0-)			8890.	



SCANNED JUL 28 2011

813

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	2782.	8874.	8874.
	2	Savings and temporary cash investments			
	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 ▶ 289831.			
		Less: allowance for doubtful accounts ▶	298136.	289831.	289831.
	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			
Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less: accumulated depreciation ▶			
	12	Investments - mortgage loans			
	13	Investments - other Stmt 4	1137118.	1161508.	1161508.
	14	Land, buildings, and equipment basis ▶			
		Less: accumulated depreciation ▶			
	15	Other assets (describe ▶)			
	16	Total assets (to be completed by all filers)	1438036.	1460213.	1460213.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
Net Assets or Fund Balances	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.	0.	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☐			
		and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒			
		and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	0.	0.	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
29	Retained earnings, accumulated income, endowment, or other funds	1438036.	1460213.		
	30	Total net assets or fund balances	1438036.	1460213.	
	31	Total liabilities and net assets/fund balances	1438036.	1460213.	

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	1438036.
2	Enter amount from Part I, line 27a	2	22177.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	1460213.
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	1460213.

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			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
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	272016.	1571875.	.173052
2007	190466.	1730506.	.110064
2006	208044.	1741921.	.119434
2005	389038.	1319003.	.294949
2004	390648.	1636402.	.238724

2 Total of line 1, column (d)	2	.936223
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	.187245
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1429416.
5 Multiply line 4 by line 3	5	267651.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	89.
7 Add lines 5 and 6	7	267740.
8 Enter qualifying distributions from Part XII, line 4	8	54034.

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	178.
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 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	178.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	178.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		178.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2010 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
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. (2) On foundation managers ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		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) ☐ NY		
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

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? Website address N/A	13	X	
14	The books are in care of David Soifer Cpa Telephone no 845 354 7293 Located at 24 Jackson Ave, Spring Valley, NY ZIP+4 10977			
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)? Organizations relying on a current notice regarding disaster assistance check here N/A	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? N/A	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 N/A	2a	
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) N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here N/A		
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	3a	
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.) N/A	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

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

If "Yes" to 6b, file Form 8870.

X

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
Usher Wagshall	Trustee			
471 Bedford Ave				
Brooklyn, NY 11211	0.00	0.	0.	0.
Rita Wagshall	Trustee			
471 Bedford Ave				
Brooklyn, NY 11211	0.00	0.	0.	0.

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

Total number of others receiving over \$50,000 for professional services	0
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Part IX-B	Summary of Program-Related Investments
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Form **990-PF** (2009)

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	0.
b	Average of monthly cash balances	1b	13513.
c	Fair market value of all other assets	1c	1437671.
d	Total (add lines 1a, b, and c)	1d	1451184.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1451184.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	21768.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1429416.
6	Minimum investment return. Enter 5% of line 5	6	71471.

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	71471.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	178.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	178.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	71293.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	71293.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	71293.

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	54034.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
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	54034.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	54034.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				71293.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004	314788.			
b From 2005	331822.			
c From 2006	121052.			
d From 2007	103956.			
e From 2008	193431.			
f Total of lines 3a through e	1065049.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$	54034.			
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				54034.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	17259.			17259.
6 Enter the net total of each column as indicated below:	1047790.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	297529.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	750261.			
10 Analysis of line 9				
a Excess from 2005	331822.			
b Excess from 2006	121052.			
c Excess from 2007	103956.			
d Excess from 2008	193431.			
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))

None

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

None

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

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

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

Usher Wagshal, 718-384-4160
471 BEDFORD AVE., BROOKLYN, NY 11219

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

No special form

c Any submission deadlines

None

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

Religious Organization

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year see schedule	none	religious organization	to Promote activities of organization	54034.
Total			▶ 3a	54034.
b Approved for future payment None				
Total			▶ 3b	0.

Part XVI-A

Unrelated business income

Excluded by section 512, 513, or 514

(e)
Related or exempt
function income

a _____

b _____

c _____

d _____

e _____

f _____

g Fees and contracts from government agencies

2 Membership dues and assessments

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5 Net rental income or (loss) from real estate

a Debt-financed property

b Not debt-financed property

6 Net rental income or (loss) from personal property

7 Other investment income

8 Gain or (loss) from sales of assets other than inventory

9 Net income or (loss) from special events

10 Gross profit or (loss) from sales of inventory

11 Other revenue

a _____

b _____

c _____

d _____

e _____

12 Subtotal Add columns (b), (d), and (e)

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

(See worksheet in line 13 instructions to verify calculations)

523000

0.

0

8890.

13

8890.

Part XVI-B

Line No.

▼

Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes)

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

Page 13

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? a Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets b Other transactions (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations c Sharing of facilities, equipment, mailing lists, other assets, or paid employees d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		Yes	No
	1a(1)		X
	1a(2)		X
	1b(1)		X
	1b(2)		X
	1b(3)		X
	1b(4)		X
	1b(5)		X
	1b(6)		X
	1c		X

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

b If "Yes," complete the following schedule

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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer or trustee		Date	Trustee		Title	
	Preparer's signature 		07/15/11	Check if self-employed ☒	Preparer's identifying number		
Paid Preparer's Use Only	Firm's name (or yours if self-employed), address, and ZIP code G David Soifer CPA 24 Jackson Ave Spring Valley, NY 10977-1908				EIN 		
					Phone no 845-354-7293		

Form **990-PF** (2009)

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization

U&R Foundation
C/O Wagshal

Employer identification number

52-2283939

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions
for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization
U&R Foundation
C/O Wagshal

Employer identification number

52-2283939

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Emanuel & Clara Steinmetz Trust 465 Bedford Ave Brooklyn, NY 11211	\$ 60000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
2	Usher & Rita Wagshall 471 Bedford Ave Brooklyn, NY 11211	\$ 10000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

Name of organization

U&R Foundation

C/O Waqshal

Employer identification number

52-2283939

Part II Noncash Property (see instructions)

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

Name of organization

Employer identification number

U&R Foundation
C/O Wagshal

52-2283939

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

Form 990-PF	Other Income		Statement	1
Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	
via k-1 Real propert LLC	4160.	4160.	4160.	
via k-1 kent 3000	4730.	4730.	4730.	
Total to Form 990-PF, Part I, line 11	8890.	8890.	8890.	

Form 990-PF	Accounting Fees		Statement	2
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
accounting	2550.	0.	0.	0.
To Form 990-PF, Pg 1, ln 16b	2550.	0.	0.	0.

Form 990-PF	Other Expenses		Statement	3
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
office	129.	0.	0.	0.
To Form 990-PF, Pg 1, ln 23	129.	0.	0.	0.

Form 990-PF	Other Investments		Statement	4
Description	Valuation Method	Book Value	Fair Market Value	
investment in partnerships	COST	1161508.	1161508.	
Total to Form 990-PF, Part II, line 13		1161508.	1161508.	

				U&R Foundation	
				7/1/2009-6/30/2010	
MO	DA	YR	REF	DESCRIPTION	AMOUNT
7	1	9	1115	yeshiva shaar efraim	250
7	2	9	1042	cong ziditchov	300
7	3	9	180	Yeshiva Farm Settlement	500
7	3	9	1107	cong beer mordechai	50
7	10	9	198	Ichud Hatalmudim	300
7	24	9	173	Cong Divrei Chaim	360
7	24	9	1118	haben yakir	250
7	24	9	1036	KYT	200
7	31	9	204	Cong Zer Hakodesh	600
8	5	9	197	Cong Kollel Ahavas Yerush	700
8	7	9	1116	pele yoetz	100
8	11	9	1114	cong azv	100
8	20	9	1112	tzeduka vchesed	36
8	26	9	1037	Mky	200
8	27	9	183	Cong Khal Beis Dovid	180
8	28	9	201	Uta	500
9	1	9	205	Cong R. Y.	300
9	2	9	211	Yeshiva Zera Kodesh	1000
9	3	9	210	Cong Yetev Lev	400
9	4	9	1121	tzeduka vchesed	36
9	8	9	214	Bnos Chayil	800
9	8	9	206	Cong Yetev Lev	500
9	10	9	1120	yeshiva bnos ahavas israe	36
9	11	9	1125	tzeduka vchesed	18
9	14	9	199	Bcbk	1100
9	14	9	1126	tzeduka vchesed	18
9	15	9	209	Kupas Boro Park	300
9	15	9	1127	tzeduka vchesed	36
9	15	9	1129	tzeduka vchesed	50
9	15	9	1141	tzeduka vchesed	18
9	16	9	1140	kolel avreichem	120
9	16	9	1143	tzeduka vchesed	20
9	17	9	215	Yeshiva Shaar Efraim	500
9	17	9	1139	cong mesamche lev	200
9	17	9	1132	cant read	250
9	18	9	1133	cong kolel emes vemunah	200
9	18	9	1128	kyt	200
9	21	9	212	Cong Oseh Chesed	400

				U&R Foundation	
				7/1/2009-6/30/2010	
MO	DA	YR	REF	DESCRIPTION	AMOUNT
9	21	9	1130	cong kcy	500
9	21	9	1135	yzk	100
9	23	9	208	Cong	300
9	23	9	216	Cong Kol Tov	2000
9	23	9	1123	cong minchas yosef	100
9	25	9	1136	cong zichron menachem	72
9	25	9	1119	hatzolah	100
9	25	9	1144	yeshiva shaar efraim	400
9	28	9	1122	zichron menachem mendel	100
9		9	1134	cong gemach zichron menac	150
10	1	9	1137	cong bnei yesosscher	50
10	14	9	220	Cong Kcy	1000
10	15	9	1146	c/o argentina	50
10	16	9	217	Cong Khal Toras Chaim	42
10	16	9	1147	cong chaim vchesed	200
10	22	9	1150	cong beth david	1000
10	22	9	1152	t.t. zibhe zedek	200
10	22	9	1149	viznitz	250
10	27	9	221	Cong Emek Hatalmud	550
10	29	9	207	Cong Yetev Lev	500
10	29	9	224	Cong Yetev Lev	1000
10	29	9	218	TT Dkasho	800
10	30	9	1153	hatzolah	100
11	2	9	1155	cong lomdei torah	50
11	3	9	1154	kupas ezra	100
11	4	9	1131	yeshiva bnos ahavas israe	250
11	13	9	222	Bnos Chayil	800
11	13	9	1158	cong dy	50
11	15	9	1138	cong bais yakov	200
11	16	9	1148	yeshiva mechalkei hadas	250
11	17	9	1159	cong zichron shlomo	72
11	19	9	1142	tzeduka vchesed	18
11	23	9	225	Bcbk	2400
11	23	9	1157	cong	100
11	24	9	223	Cong Heichel Moshe	2000
11	25	9	1173	cong bais mordechai	100
11	27	9	1161	cong heichel moshe	300
11	30	9	227	Cong Yetev Lev	5000

				U&R Foundation	
				7/1/2009-6/30/2010	
MO	DA	YR	REF	DESCRIPTION	AMOUNT
12	1	9	234	Cong Beth Pinchus	500
12	1	9	231	Cong Emek Hatalmud	550
12	1	9	229	Keren Ezra	500
12	1	9	230	Tam Eden	500
12	2	9	226	Yeshiva Bnos Ahavas Yisro	700
12	2	9	1166	keren hatzolah	100
12	2	9	1162	khal beth yitzchok dspink	36
12	2	9	1169	kupas ezra	50
12	3	9	1183	cong chaim vchesed	300
12	3	9	1175	cong spinka	600
12	4	9	1181	tzeduka vchesed	36
12	7	9	236	Cong Beth Pinchus	500
12	7	9	1171	Rcc	100
12	8	9	1160	cong azv	100
12	8	9	1182	khal beth yitzchok dspink	72
12	8	9	1156	kolel avreichem	100
12	9	9	1180	cong binyan yerushalayim	26
12	9	9	1184	m.r.a.	36
12	10	9	1185	tzeduka vchesed	100
12	11	9	1151	cong bais yosef tzvi	100
12	14	9	1186	yeshiva dmonsey	180
12	15	9	241	Rav Tov	700
12	16	9	235	Cong Menuchas Hanefesh	500
12	16	9	239	Cong Pisschif	2500
12	16	9	1174	yeshiva dshikun square	100
12	17	9	1187	cant read	36
12	18	9	1164	cong kyy	10
12	20	9	1163	midrash l'man achai	36
12	21	9	1188	cong of tosh	500
12	21	9	1172	cant read	100
12	23	9	1170	kiryat melacha	25
12	23	9	1167	tomchei shabbos	25
12	28	9	240	Chevra Tomchei Shabbos	5000
12	28	9	237	Cong Yetev Lev	400
12	28	9	1189	cong divrei simcha	100
12	28	9	1165	cong zichron menachem	36
12	29	9	244	Khal Toras Chaim	100
12	30	9	232	Cong	300

					U&R Foundation	
					7/1/2009-6/30/2010	
MO	DA	YR	REF		DESCRIPTION	AMOUNT
1	5	10	1191		cong shaar hatfilah	100
1	5	10	1193		mesamche lev	100
1	6	10	246		Cong Emek Hatalmud	550
1	6	10	248		Cong Yisroel Vhazmanim	600
1	6	10	1190		cong bais yonah	50
1	6	10	1176		cong toldos yitzchok	200
1	6	10	1168		kollel yirei hashem	18
1	7	10	238		Cong	400
1	7	10	1192		keren chasanim	100
1	7	10	1196		kyt	100
1	8	10	1195		yad lachim	50
1	11	10	249		Cong Yetev Lev	1000
1	12	10	1194		kupas ezra	50
1	19	10	1204		cong ateres bonim	200
1	19	10	1198		surah bohel	36
1	20	10	253		Cong Emek Hatalmud	550
1	21	10	251		Cong Divrei Simcha	300
1	22	10	1205		cong khal minchus chinuch	36
1	22	10	1197		cong yetev lev	500
1	22	10	1206		cong yetev lev	36
1	22	10	1200		yeshiva of nitra	36
1	25	10	1202		cong emek hatalmud	200
1	26	10	250		Cong Yetev Lev	1000
1	26	10	254		Cong Zera Kodesh	600
1	28	10	1209		cong bais yehuda	36
1	29	10	1212		khal kiryat sefer	100
1	29	10	1199		kollel shomrei hachomos	20
2	1	10	1208		rav chesed	500
2	3	10	1211		cong bmz	36
2	4	10	1207		mesivta zion hatorah	36
2	8	10	1177		cong toldos yitzchok	200
2	9	10	1124		paila yoetz	50
2	10	10	1210		rav chesed	36
2	12	10	260		TT Dkasho	400
2	12	10	1213		bais hatavshil	500
2	12	10	1201		cong belz	50
2	12	10	1215		tzeduka vchesed	50
2	16	10	259		cong bnei mordechai	750

				U&R Foundation	
				7/1/2009-6/30/2010	
MO	DA	YR	REF	DESCRIPTION	AMOUNT
2	16	10	262	yeshiva	2500
2	16	10	1219	cong bnei mordechai	100
2	17	10	1203	cong zichron meir tzvi	300
2	22	10	258	cong chasdei avos	1700
2	22	10	265	keren mogein emoshia	500
2	22	10	1220	cong zichron moshe	36
2	22	10	1214	uta	72
2	23	10	1226	family relieve	36
2	25	10	1222	cong tiferes moshe	180
2	26	10	1217	cong chaim vchesed	36
3	4	10	270	cong bnei mordechai	200
3	4	10	269	cong dinev	200
3	4	10	1223	cong ezras yisroel	40
3	4	10	1230	tzeduka vchesed	36
3	4	10	1227	vaad	72
3	5	10	272	cong ohr hameir	100
3	8	10	274	Cong Emek Hatalmud	550
3	8	10	1221	cong nivei hachesed	40
3	8	10	1229	eretz hachaim	10
3	9	10	267	cong a.y.	400
3	9	10	1231	kol somer	36
3	10	10	1232	beth chuna	50
3	10	10	1225	cong ezras yisroel	25
3	12	10	1216	h.y.t.	300
3	12	10	1233	tzeduka vchesed	50
3	15	10	1178	cong spinka	200
3	16	10	245	yeshiva bnei shimon yisae	400
3	16	10	255	yeshiva bnei shimon yisae	1000
3	19	10	261	Bnos Chayil	600
3	19	10	271	cong bnei mordechai	50
3	21	10	275	v.m.b.	500
3	25	10	266	yeshiva bnei shimon yisae	256
3	25	10	1234	tzeduka vchesed	25
3	25	10	1236	tzeduka vchesed	50
3	29	10	277	cong zichron yona	150
3	29	10	276	sudos erev	100
3	29	10	1238	tomchei shabbos	180
3	29	10	1224	tzeduka vchesed	40

					U&R Foundation	
					7/1/2009-6/30/2010	
MO	DA	YR	REF		DESCRIPTION	AMOUNT
4	8	10	264		cong noam eluzer	400
4	8	10	1239		cong binas yisoscher	36
4	12	10	1235		uta	100
4	20	10	1240		g.s.b.	180
4	22	10	1237		bais shmiel	100
4	26	10	233		cong keren ezra	150
4	28	10	1250		cong bais yosef tzvi	100
4	29	10	1249		hatzolah	360
4	30	10	1251		uta	18
5	3	10	1247		hisachdus chasidei square	36
5	5	10	1248		byala yeshiva	100
5	6	10	1228		cong anshei breslov	50
5	6	10	1242		cong toldos yitzchok	1000
5	11	10	1252		mosdos radeshitz	36
5	18	10	1254		cong mishmeres sholom	50
5	18	10	1253		cong ohr laysharim	100
5	20	10	1243		cong notza chesed	100
6	7	10	1255		cong shaarei tefillah	100
6	8	10	278		tomchei shabbos	100
6	11	10	1241		bnos chayil	100
6	16	10	1244		cong	200
6	23	10	280		Cong Emek Hatalmud	550
6	23	10	1256		cong nachlas moshe	36