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Department of the Treasury
Internal Revenue ServiceReturn of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

OMB No 1545-0052

2009

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 DEC 1, 2009, and ending NOV 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 BERNARD & SARAH GEWIRZ FOUNDATION		A Employer identification number 52-1381689
	Number and street (or P.O. box number if mail is not delivered to street address) 1666 K STREET, NW	Room/suite 430	B Telephone number 202-296-7311
	City or town, state, and ZIP code WASHINGTON, DC 20006		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 4,182,481.		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		1,592.	1,592.		Statement 1
4 Dividends and interest from securities		15,003.	15,003.		Statement 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		24,659.			
b Gross sales price for all assets on line 6a		24,659.			
7 Capital gain/loss net income (from Part IV, line 2)			24,659.		
8 Net short-term capital gain					
9 Income modifications: a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		239,684.	239,684.		Statement 3
12 Total. Add lines 1 through 11		280,938.	280,938.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees					
c Other professional fees Stmt 4		137.	0.		0.
17 Interest					
18 Taxes Stmt 5		75.	0.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses Stmt 6		240.	0.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		452.	0.		0.
25 Contributions, gifts, grants paid		535,665.			535,665.
26 Total expenses and disbursements. Add lines 24 and 25		536,117.	0.		535,665.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-255,179.			
b Net investment income (if negative, enter -0-)			280,938.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	216.	30,349.	30,349.	
	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 ▶ 41,256.				
	Less: allowance for doubtful accounts ▶	41,256.	41,256.	41,256.	
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U.S. and state government obligations Stmt 7	510,003.	400,876.	400,876.	
	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 8	3,342,506.	3,166,321.	3,710,000.	
	14 Land, buildings, and equipment basis ▶				
	Less accumulated depreciation ▶				
	15 Other assets (describe ▶)				
	16 Total assets (to be completed by all filers)	3,893,981.	3,638,802.	4,182,481.	
	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.			
Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>	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	3,893,981.	3,638,802.	
		30 Total net assets or fund balances	3,893,981.	3,638,802.	
	31 Total liabilities and net assets/fund balances	3,893,981.	3,638,802.		

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	3,893,981.
2 Enter amount from Part I, line 27a	2	-255,179.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	3,638,802.
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	3,638,802.

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 FROM PARTNERSHIPS		P		
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a 24,659.			24,659.	
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			24,659.	
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> <div style="margin-left: 10px;"> 24,659. </div> </div>		
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		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> N/A </div> </div>		

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	519,938.	4,200,808.	.123771
2007	472,271.	3,928,684.	.120211
2006	521,085.	4,420,289.	.117885
2005	478,784.	4,280,209.	.111860
2004	463,681.	4,010,807.	.115608
2 Total of line 1, column (d)			2 .589335
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 .117867
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 4,085,587.
5 Multiply line 4 by line 3			5 481,556.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 2,809.
7 Add lines 5 and 6			7 484,365.
8 Enter qualifying distributions from Part XII, line 4			8 535,665.

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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	2,809.
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	2,809.
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	2,809.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	7,600.	
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	7,600.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	4,791.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input checked="" type="checkbox"/> 4,791. Refunded <input type="checkbox"/>	11	0.	

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. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 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) <input checked="" type="checkbox"/>		
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

N/A

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Part VII-A Statements Regarding Activities (continued)

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

Website address ► N/A

14 The books are in care of ► SARAH GEWIRZ Telephone no. ► 202-296-7311
 Located at ► 1666 K STREET, NW SUITE 430, WASHINGTON, DC ZIP+4 ► 20006

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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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	<u>N/A</u>	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ► _____ , _____ , _____ , _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	<u>N/A</u>	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____ , _____ , _____ , _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	<u>N/A</u>	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?**6b**

X

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 9		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

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

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	0.
b	Average of monthly cash balances	1b	36,928.
c	Fair market value of all other assets	1c	4,110,876.
d	Total (add lines 1a, b, and c)	1d	4,147,804.
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	4,147,804.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	62,217.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,085,587.
6	Minimum investment return. Enter 5% of line 5	6	204,279.

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	204,279.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2,809.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,809.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	201,470.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	201,470.
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	201,470.

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	535,665.
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	535,665.
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	2,809.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	532,856.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				201,470.
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	273,225.			
b From 2005	275,274.			
c From 2006	312,573.			
d From 2007	290,327.			
e From 2008	309,898.			
f Total of lines 3a through e	1,461,297.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$	535,665.			
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				201,470.
e Remaining amount distributed out of corpus	334,195.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	1,795,492.			
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	273,225.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,522,267.			
10 Analysis of line 9:				
a Excess from 2005	275,274.			
b Excess from 2006	312,573.			
c Excess from 2007	290,327.			
d Excess from 2008	309,898.			
e Excess from 2009	334,195.			

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year SEE ATTACHED SCHEDULE	NONE	CHARITABLE ORGANIZATI	CHARITABLE	535,665.
Total			▶ 3a	535,665.
b Approved for future payment None				
Total			▶ 3b	0.

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

		Yes	No
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	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
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.		

[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 _____

Title

President

Preparer's
signature

**Firm's name (or yours
if self-employed),
address, and ZIP code**

BARKANIC & AMES, L.L.C.
15825 SHADY GROVE ROAD, SUITE 130
ROCKVILLE, MD 20850

Date

Date 4/15/11

Check if self- employed	
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Preparer's identifying number	
-------------------------------	--

Preparer's identifying number
00020876

EIN ►

Phone no. 301-330-6664

Form **990-PF** (2009)

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	Amount
HOSKINSON NOTE	998.
PARTNERSHIPS	594.
Total to Form 990-PF, Part I, line 3, Column A	1,592.

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
PERSHING LLC	15,003.	0.	15,003.
Total to Fm 990-PF, Part I, ln 4	15,003.	0.	15,003.

Form 990-PF Other Income Statement 3

Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
PARTNERSHIP INCOME	239,684.	239,684.	
Total to Form 990-PF, Part I, line 11	239,684.	239,684.	

Form 990-PF Other Professional Fees Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
MANAGEMENT FEE	137.	0.		0.
To Form 990-PF, Pg 1, ln 16c	137.	0.		0.

Form 990-PF	Taxes			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
DC ACCUAL REPORT	75.	0.		0.	
To Form 990-PF, Pg 1, ln 18	75.	0.		0.	

Form 990-PF	Other Expenses			Statement	6
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
BANK SERVICE CHARGES	97.	0.		0.	
PARTNERSHIP EXPENSE	143.	0.		0.	
To Form 990-PF, Pg 1, ln 23	240.	0.		0.	

Form 990-PF	U.S. and State/City Government Obligations			Statement	7
Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value	
M&T SECURITIES	X		400,876.	400,876.	
Total U.S. Government Obligations			400,876.	400,876.	
Total State and Municipal Government Obligations					
Total to Form 990-PF, Part II, line 10a			400,876.	400,876.	

Form 990-PF	Other Investments	Statement	8
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Description	Valuation Method	Book Value	Fair Market Value
1620 K STREET	COST	1,912,944.	2,000,000.
DORCHESTER HOUSE	COST	294,970.	700,000.
DORCHESTER JV	COST	111,573.	10,000.
HOME PROPERTIES	COST	682,414.	800,000.
KALORAMA WEST LLC	COST	164,420.	200,000.
Total to Form 990-PF, Part II, line 13		3,166,321.	3,710,000.

Form 990-PF	Part VIII - List of Officers, Directors Trustees and Foundation Managers	Statement	9
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Name and Address	Title and Avrg Hrs/Wk	Compensation	Employee Ben Plan Contrib	Expense Account
BERNARD S. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	PRESIDENT 8.00	0.	0.	0.
SARAH M. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIR/SECY 8.00	0.	0.	0.
MICHAEL K. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIR/VP 1.00	0.	0.	0.
JONATHAN K. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIRECTOR 1.00	0.	0.	0.
STEVEN B. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIRECTOR 1.00	0.	0.	0.
Totals included on 990-PF, Page 6, Part VIII		0.	0.	0.

Form 990-PF

Grant Application Submission Information
Part XV, Lines 2a through 2d

Statement 10

Name and Address of Person to Whom Applications Should be SubmittedBERNARD S. GEWIRZ
1666 K ST., NW, #430
WASHINGTON, DC 20006Telephone Number

202-296-7311

Form and Content of ApplicationsNO SPECIFIC FORM REQUIRED. APPLICATIONS SHOULD INCLUDE NAME, ADDRESS AND
INFORMATION REGARDING CHARITABLE PURPOSE AND STATUS AS EXEMPT ORGANIZATION.Any Submission Deadlines

NONE

Restrictions and Limitations on Awards

NONE

Bernard Sarah Gewirz Foundation
Transactions By Account
As of November 30, 2010

Donation	Type	Date	Num	Name	Debit
	Check	07/07/2010	5650	Adas Israel Congregation	5,000 00
	Check	08/17/2010	5660	Adas Israel Congregation	1,000 00
				Adas Israel Congregation Total	1,000 00
	Check	04/01/2010	5482	Agavidurch Lang Irvet	2,500 00
				Agavidurch Lang Irvet Total	2,500 00
	Check	03/05/2010	5480	American Heart Association	100 00
				American Heart Association Total	100 00
	Check	01/09/2010	5462	American Jewish Community	1,000 00
				American Jewish Community Total	1,000 00
	Check	01/09/2010	5463	Armory Art Center	500 00
				Armory Art Center Total	500 00
	Check	10/18/2010	5675	Bair Yaakov School	100 00
				Bair Yaakov School Total	100 00
	Check	06/14/2010	5495	Blethewold	500 00
				Blethewold Total	500 00
	Check	12/07/2009	5641	Bnai Brith	10,000 00
				Bnai Brith Total	10,000 00
	Check	07/07/2010	5501	Bnai Brith International	118 00
				Bnai Brith International Total	118 00
	Check	08/17/2010	5663	Boys and Girls Club of Greater Washington	500 00
				Boys and Girls Club of Greater Washington Total	500 00
	Check	02/05/2010	5469	Childrens Hospital Foundation	2,000 00
	Check	03/05/2010	5475	Childrens Hospital Foundation	3,000 00
				Childrens Hospital Foundation Total	5,000 00
	Check	01/09/2010	5461	Children's National Medical Center	2,000 00
				Children's National Medical Center Total	2,000 00
	Check	08/17/2010	5659	Clagett Regatta	500 00
				Clagett Regatta Total	500 00
	Check	02/05/2010	5467	Focus	1,000 00
				Focus Total	1,000 00

Bernard Sarah Gewirz Foundation
Transactions By Account
As of November 30, 2010

Type	Date	Num	Name	Debit
Check	11/15/2010	5679	Garden of Remembrance Memorial Park	22,000 00
			Garden of Remembrance Memorial Park Total	22,000 00
Check	02/05/2010	5470	George Washington Institute	1,000 00
			George Washington Institute Total	1,000 00
Check	02/05/2010	5468	George Washington University	100 00
Check	07/07/2010	5649	George Washington University	25,000 00
			George Washington University Total	25,100 00
Check	11/15/2010	5680	Georgetown University	100,000.00
			Georgetown University Total	100,000 00
Check	03/05/2010	5476	Heritage Foundation	500 00
Check	04/01/2010	5486	Heritage Foundation	500 00
			Heritage Foundation Total	1,000 00
Check	09/03/2010	5668	Hillel Foundation	1,000 00
			Hillel Foundation Total	1,000 00
Check	11/01/2010	5458	Hospice Foundation of Palm Beach Conty	1,500 00
			Hospice Foundation of Palm Beach Conty Total	1,500 00
Check	12/07/2009	5643	International Tennis Hall of Fame	3,000 00
Check	06/14/2010	5497	International Tennis Hall of Fame	500 00
Check	10/18/2010	5677	International Tennis Hall of Fame	3,000 00
			International Tennis Hall of Fame Total	6,500 00
Check	05/10/2010	5493	Island Moving Co	1,250 00
Check	11/08/2010	5678	Island Moving Co	250 00
			Island Moving Co Total	1,500 00
Check	10/04/2010	5674	Israel Cancer, USA	500 00
			Israel Cancer, USA Total	500 00
Check	11/15/2010	5683	Jewish Endowment Fund	25,000 00
			Jewish Endowment Fund Total	25,000 00
Check	12/07/2009	5647	Jewish Federation of Palm Beach	3,000 00
Check	11/15/2010	5688	Jewish Federation of Palm Beach	3,000 00
			Jewish Federation of Palm Beach Total	6,000 00
Check	07/07/2010	5657	Jewish Historncal Society	10,000.00

Bernard Sarah Gewirz Foundation
Transactions By Account
As of November 30, 2010

<u>Type</u>	<u>Date</u>	<u>Num</u>	<u>Name</u>	<u>Debit</u>
			Jewish Historical Society Total	10,000 00
Check	03/05/2010	5473	John F. Kennedy Center for the Arts	50,000 00
			John F. Kennedy Center for the Arts Total	50,000 00
Check	09/03/2010	5666	John Hopkins Hospital	500 00
			John Hopkins Hospital Total	500 00
Check	03/05/2010	5477	Kennedy Center	5,000 00
Check	07/07/2010	5654	Kennedy Center	10,000 00
			Kennedy Center Total	15,000 00
Check	12/07/2009	5644	Landon Place Annual Fund	1,000 00
			Landon Place Annual Fund Total	1,000 00
Check	03/05/2010	5474	Landon School Annual Fund	10,000 00
			Landon School Annual Fund Total	10,000 00
Check	04/01/2010	5485	Levine School of Music	1,000 00
			Levine School of Music Total	1,000 00
Check	01/09/2010	5464	Ludor Place Foundation	3,000 00
			Ludor Place Foundation Total	3,000 00
Check	02/05/2010	5465	Mercersburg Academy	200 00
Check	09/03/2010	5669	Mercersburg Academy	500 00
			Mercersburg Academy Total	700 00
Check	11/15/2010	5685	National Cathedral School	2,500 00
			National Cathedral School Total	2,500 00
Check	10/18/2010	5676	National Gallery of Art	1,000 00
Check	11/15/2010	5681	National Gallery of Art	25,000 00
			National Gallery of Art Total	26,000 00
Check	05/10/2010	5489	National Museum of Women in the Arts	100 00
			National Museum of Women in the Arts Total	100 00
Check	03/05/2010	5481	Newport Antiques Show	5,000 00
			Newport Antiques Show Total	5,000 00
Check	05/10/2010	5492	Newport Art Museum	5,000 00
Check	09/03/2010	5667	Newport Art Museum	15,000 00
Check	10/04/2010	5672	Newport Art Museum	500 00

Bernard Sarah Gewirz Foundation
Transactions By Account
As of November 30, 2010

<u>Type</u>	<u>Date</u>	<u>Num</u>	<u>Name</u>	<u>Debit</u>
Check	11/01/2010	5459	Newport Art Museum	1,000 00
			Newport Art Museum Total	21,500 00
Check	07/07/2010	5647	Newport Film	500 00
			Newport Film Total	500 00
Check	12/08/2009	5648	Newport Historical Society	1,000 00
			Newport Historical Society Total	1,000 00
Check	12/07/2009	5642	Newport Hospital Foundation	1,000 00
Check	06/14/2010	5499	Newport Hospital Foundation	5,000 00
Check	07/07/2010	5651	Newport Hospital Foundation	2,500 00
			Newport Hospital Foundation Total	8,500 00
Check	04/01/2010	5484	Newport Music Festival	1,000 00
			Newport Music Festival Total	1,000 00
Check	12/07/2009	5646	Newport Public Library	100 00
			Newport Public Library Total	100 00
Check	03/05/2010	5479	Oliver Hazary Perry	500 00
Check	07/07/2010	5658	Oliver Hazary Perry	500 00
			Oliver Hazary Perry Total	1,000 00
Check	03/05/2010	5471	Operation Understanding	250 00
			Operation Understanding Total	250 00
Check	07/07/2010	5653	Palm Beach Civic Assoc	1,000 00
			Palm Beach Civic Assoc. Total	1,000 00
Check	04/01/2010	5483	Palm Beach Council of the Firefighters	50 00
			Palm Beach Council of the Firefighters Total	50 00
Check	08/17/2010	5662	Palm Beach Country Club Foundation	1,000 00
			Palm Beach Country Club Foundation Total	1,000 00
Check	09/03/2010	5670	Pi Tan Pi	90 00
			Pi Tan Pi Total	90 00
Check	06/14/2010	5498	Potter League for Animals	190 00
			Potter League for Animals Total	190 00
Check	12/07/2009	5645	Preservation Society of Newport County	2,500 00
Check	02/05/2010	5466	Preservation Society of Newport County	4,191 84

Bernard Sarah Gewirz Foundation
Transactions By Account
As of November 30, 2010

Type	Date	Num	Name	Debit
Check	05/10/2010	5490	Preservation Society of Newport County	8,000 00
Check	05/10/2010	5491	Preservation Society of Newport County	1,000 00
Check	06/14/2010	5496	Preservation Society of Newport County	2,275 00
Check	07/07/2010	5652	Preservation Society of Newport County	2,000 00
			Preservation Society of Newport County Total	19,966 84
Check	03/05/2010	5472	Rainbow Babies & Children's Hospital	400 00
			Rainbow Babies & Children's Hospital Total	400 00
Check	10/04/2010	5673	Raymond Kravis Center for the Performing	1,000 00
			Raymond Kravis Center for the Performing Total	1,000 00
Check	03/05/2010	5478	Redwood Library	10,000 00
Check	07/07/2010	5646	Redwood Library	150 00
Check	07/07/2010	5648	Redwood Library	1,000 00
Check	07/07/2010	5655	Redwood Library	5,000 00
Check	08/17/2010	5661	Redwood Library	1,000 00
			Redwood Library Total	17,150 00
Check	07/07/2010	5656	Salve Regina University	5,000 00
			Salve Regina University Total	5,000 00
Check	06/14/2010	5500	Sebley Memorial Hospital Foundation	5,000 00
			Sebley Memorial Hospital Foundation Total	5,000 00
Check	05/10/2010	5487	Sixth & J Historic Synagogue	200 00
			Sixth & J Historic Synagogue Total	200 00
Check	11/15/2010	5686	St Albani's School	2,500 00
			St. Albani's School Total	2,500 00
Check	11/15/2010	5690	St Andrews School	1,500 00
			St. Andrews School Total	1,500 00
Check	08/21/2010	5664	The Peek	1,000 00
			The Peek Total	1,000 00
Check	11/15/2010	5687	The Washington Ballet	5,000 00
			The Washington Ballet Total	5,000 00
Check	01/02/2010	5460	Touro Synagogue Foundation	1,000 00
Check	08/21/2010	5665	Touro Synagogue Foundation	10,000 00
Check	11/15/2010	5689	Touro Synagogue Foundation	1,100 00
			Touro Synagogue Foundation Total	12,100 00

Bernard Sarah Gewirz Foundation
Transactions By Account
As of November 30, 2010

<u>Type</u>	<u>Date</u>	<u>Num</u>	<u>Name</u>	<u>Debit</u>
Check	12/07/2009	5640	Town of Palm Beach United Way	25,000 00
Check	11/15/2010	5684	Town of Palm Beach United Way	25,000 00
			Town of Palm Beach United Way Total	50,000 00
Check	11/15/2010	5682	United Way of Rhode Island	31,500 00
			United Way of Rhode Island Total	31,500 00
Check	05/10/2010	5488	USNA Foundation	200 00
			USNA Foundation Total	200 00
Check	05/10/2010	5494	Washington DC Jewish Comm Center	1,000 00
			Washington DC Jewish Comm. Center Total	1,000 00
Check	10/04/2010	5671	Yachad	250 00
			Yachad Total	250 00
Total Donation			Grand Total	<u>530,664 84</u>