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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning 01-01-2010 , and ending 12-31-2010

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

Name of foundation
ROBERT & DALE ROSEN CHARITABLE
FOUNDATION TR U/A 8/05/92

A Employer identification number
13-6997530

Number and street (or P O box number if mail is not delivered to street address) Room/suite
67 PECKSLAND ROAD

B Telephone number (see page 10 of the instructions)
(203) 625-3165

City or town, state, and ZIP code
GREENWICH, CT 06831

C If exemption application is pending, check here ▶ ☐
D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐
E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)*▶$ 325,655

J Accounting method ☑ Cash ☐ Accrual
☐ Other (specify) _
(Part I, column (d) must be on cash basis.)

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) (see page 11 of the instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	105,605			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	7	7		
	4	Dividends and interest from securities	5,547	5,547		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	13,226			
	b	Gross sales price for all assets on line 6a 72,699				
	7	Capital gain net income (from Part IV, line 2)		18,193		
	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) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	124,385	23,747		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	24	24		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	2,933	2,933		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	2,957	2,957		0
	25	Contributions, gifts, grants paid	85,690			85,690
	26	**Total expenses and disbursements.** Add lines 24 and 25	88,647	2,957		85,690
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	35,738			
	b	**Net investment income** (if negative, enter -0-)		20,790		
	c	**Adjusted net income** (if negative, enter -0-)				

Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	22,505	14,525	14,525
	2 Savings and temporary cash investments		7,206	7,206
	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 (attach schedule) (see page 15 of the instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	186,483	222,995	303,924
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	208,988	244,726	325,655
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	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	208,988	208,988	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29 Retained earnings, accumulated income, endowment, or other funds	0	35,738	
	30 **Total net assets or fund balances** (see page 17 of the instructions)	208,988	244,726	
	31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	208,988	244,726	

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	208,988
2	Enter amount from Part I, line 27a	2	35,738
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	244,726
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	244,726

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	See Additional Data Table			
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	See Additional Data Table			
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
a	See Additional Data Table			
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	18,193
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) (see pages 13 and 17 of the instructions) 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 page 18 of the 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))
2009	161,863	230,733	0 701516
2008	200,179	226,077	0 885446
2007	180,281	489,024	0 368655
2006	104,747	238,793	0 438652
2005	104,747	238,793	0 438652

2	**Total** of line 1, column (d)	2	2 832921
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	0 566584
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	253,337
5	Multiply line 4 by line 3	5	143,537
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	208
7	Add lines 5 and 6	7	143,745
8	Enter qualifying distributions from Part XII, line 4	8	85,690

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 on page 18

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b			1	416
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	416
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	416
6	Credits/Payments				
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a			
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	475		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	475
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached			8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	59
11	Enter the amount of line 10 to be **Credited to 2011 estimated tax** ▶ 59	**Refunded** ▶		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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	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.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
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?	2		No
	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 instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
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*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ CT			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
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 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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 page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶TAXPAYER Telephone no ▶(203) 625-3165

Located at ▶67 PECKSLAND ROAD GREENWICH CT ZIP+4 ▶06831

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 |

			Yes	No
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No

See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶

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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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 2010?	1c		No
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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? ☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
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 page 20 of the instructions)	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 ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2010 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 2010.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2010?	4b		No

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)? (see page 22 of the instructions). ☐ 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 page 22 of the instructions)? **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? ☐ 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** No

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? **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 (see page 22 of the instructions).

(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
ROBERT ROSEN 67 PECKSLAND ROAD GREENWICH, CT 06831	TRUSTEE 0 50	0	0	0
DALE ROSEN 67 PECKSLAND ROAD GREENWICH, CT 06831	TRUSTEE 0 50	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). 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

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). 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	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3. . . . . ▶	0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	241,832
b	Average of monthly cash balances	1b	15,363
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	257,195
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	257,195
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	3,858
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	253,337
6	**Minimum investment return.** Enter 5% of line 5	6	12,667

Part XI Distributable Amount (see page 25 of the 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	12,667
2a	Tax on investment income for 2010 from Part VI, line 5 — 2a: 416		
b	Income tax for 2010 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	416
3	Distributable amount before adjustments Subtract line 2c from line 1	3	12,251
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	12,251
6	Deduction from distributable amount (see page 25 of the instructions)	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	12,251

Part XII Qualifying Distributions (see page 25 of the 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	85,690
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	85,690
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 (see page 26 of the instructions)	5	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	85,690

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 page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				12,251
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only.			0	
b Total for prior years 20___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2010				
a From 2005.				
b From 2006. 93,003				
c From 2007. 155,976				
d From 2008. 188,875				
e From 2009. 150,346				
f **Total** of lines 3a through e.	588,200			
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ $ 85,690				
a Applied to 2009, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d Applied to 2010 distributable amount.				12,251
e Remaining amount distributed out of corpus	73,439			
5 Excess distributions carryover applied to 2010 *(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:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	661,639			
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 page 27 of the instructions . . .		0		
e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	0			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 **Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a	661,639			
10 Analysis of line 9				
a Excess from 2006. . . . 93,003				
b Excess from 2007. . . . 155,976				
c Excess from 2008. . . . 188,875				
d Excess from 2009. . . . 150,346				
e Excess from 2010. . . . 73,439				

Part XIV **Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, enter the date of the ruling . . . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2010	**(b)** 2009	**(c)** 2008	**(d)** 2007	
2a 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 organization had $5,000 or more in assets at any time during the year—see page 27 of 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))

See Additional Data Table

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

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 page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

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

Recipient 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 Additional Data Table				
Total . . . . ▶ **3a**				85,690
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
1 Program service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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			14	7	
4 Dividends and interest from securities. . . .			14	5,547	
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			18	13,226	
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). .		0		18,780	0

13 Total. Add line 12, columns (b), (d), and (e). 13 18,780

(See worksheet in line 13 instructions on page 28 to verify calculations)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

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 organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)

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

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

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

Sign Here

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

******	2011-11-09	******
Signature of officer or trustee	Date	Title

Paid Preparer's Use Only

		Date	Check if self-employed ☐	PTIN
Preparer's Signature	ALAN G BADEY CPA			
Firm's name	CITRIN COOPERMAN & COMPANY LLP		Firm's EIN	
Firm's address	709 WESTCHESTER AVENUE WHITE PLAINS, NY 10604		Phone no (914) 949-2990	

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491314000121

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

2010

Name of organization	Employer identification number
ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92	13-6997530

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 foundation

Check 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 lin 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)

Name of organization
ROBERT & DALE ROSEN CHARITABLE
FOUNDATION TR U/A 8/05/92

Employer identification number
13-6997530

Part I Contributors (see Instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	ROBERT ROSEN 67 PECKSLAND RD GREENWICH, CT 06831	$ 95,985	Person ☐ Payroll ☐ Noncash ☑ (Complete Part II if there is a noncash contribution)
2	ROBERT ROSEN 67 PECKSLAND RD GREENWICH, CT 06831	$ 9,619	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
ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92

Employer identification number
13-6997530

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
1	9,000 SHARES OF SAPIENT CORP STOCK	$ 95,985	2010-09-13

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

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

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

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

(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
ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92	13-6997530

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

(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

(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

(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

Additional Data

Software ID:
Software Version:
EIN: 13-6997530
Name: ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

	(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)
A	50 SH CANADIAN NATURAL RESOURCES		2006-12-18	2010-04-29
B	120 SH YUM BRANDS		2006-12-18	2010-04-29
C	300 SH JOHNSON & JOHNSON		2007-04-19	2010-09-15
D	300 SH REGENERON PHARM		2007-11-30	2010-06-03
E	300 SH FLY LEASING LTD		2008-01-29	2010-09-15
F	2000 SH SAPIENT CORP		2009-12-16	2010-10-06
G	275 SH REGENERON PHARM		2007-11-30	2010-09-15
H	100 SH CANADIAN NATURAL RESOURCES		2006-12-18	2010-06-02
I	175 SH CANADIAN NATURAL RESOURCES		2006-12-18	2010-09-15
J	100 SH YUM BRANDS		2006-12-18	2010-06-02

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

	(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	3,863		2,060	1,803
B	5,126		3,820	1,306
C	6,085		6,966	-881
D	9,003		5,689	3,314
E	3,603		4,593	-990
F	24,500		11,652	12,848
G	7,053		5,215	1,838
H	3,522		4,119	-597
I	5,831		7,209	-1,378
J	4,113		3,183	930

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

	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))
	(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				1,803
B				1,306
C				-881
D				3,314
E				-990
F				12,848
G				1,838
H				-597
I				-1,378
J				930

Form 990PF Part XV Line 1a - 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).

ROBERT ROSEN
DALE ROSEN

Form 990PF Part XV Line 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*				
ANTI DEFAMATION LEAGUE 605 THIRD AVENUE NEW YORK, NY 10158		PUBLIC	TO SUPPORT THE MISSION TO STOP ANTI-SEMITISM AND ALL FORMS OF BIGOTRY	5,100
AF OF ISRAEL MUSEUM 500 FIFTH AVENUE 2540 NEW YORK, NY 10110		PUBLIC	TO SUPPORT THE ISRAEL MUSEUM IN JERUSALEM	475
AMERICAN CANCER SOCIETY NEW ENGLAND DIVISION INC / LOWER FAIRFIELD UNIT PO BOX 907 WALLINGFORD, CT 06492		PUBLIC	TO SUPPORT THE MISSION TO ELIMINATE CANCER AND HELP PEOPLE BY FINDING CURES	150
AMERICAN FRIENDS OF TEL AVIV 39 BROADWAY SUITE 1510 NEW YORK, NY 10006		PUBLIC	COMMITTED TO NURTURING HIGHER EDUCATION AND DEVELOPING ISRAEL'S BEST MINDS	500
ANIMAL EMBASSY PO BOX 4461 STAMFORD, CT 06907		PUBLIC	FOSTERING AN INDIVIDUAL'S APPRECIATION FOR THE NATURAL WORLD	50
ANSHE EMETH MEMORIAL TEMPLE 222 LIVINGSTON AVENUE NEW BRUNSWICK, NJ 08901		PUBLIC	SUPPORT A SYNAGOGUE FOR THOSE WHO WISH TO SHARE IN JEWISH LIVING	50
ART EDUCATION FOR THE BLIND 589 BROADWAY NEW YORK, NY 10012		PUBLIC	TO MAKE ART, ART HISTORY, AND VISUAL CULTURE ACCESSIBLE TO THE BLIND	100
ASPCA SPECIAL EVENTS 424 E 92ND STREET NEW YORK, NY 10128		PUBLIC	TO HELP PROTECT ANIMALS FROM CRUELTY	500
BET TZEDEK - HOUSE OF JUSTICE 145 S FAIRFAX AVENUE STE 200 LOS ANGELES, CA 90036		PUBLIC	TO ASSIST INDIVIDUALS WITH LEGAL PROBLEMS	1,000
BREAST CANCER ALLIANCE 48 MAPLE AVENUE GREENWICH, CT 06830		PUBLIC	TO ASSIT WITH FUNDING INNOVATIVE BREAST CANCER RESEARCH	1,000
CENTER FOR EARLY EDUCATION 563 NORTH ALFRED STREET WEST HOLLYWOOD, CA 90048		PUBLIC	TO SUPPORT A LEARNING ENVIRONMENT WITH CHALLENGING ACADEMIC PROGRAMS	500
CENTRAL PARK CONSERVANCY 14 EAST 60TH STREET NEW YORK, NY 10022		PUBLIC	TO RESTORE AND ENHANCE CENTRAL PARK FOR PRESENT AND FUTURE GENERATIONS	250
CHARTER OAK CHALLENGE FOUNDATION 575 RIVERSIDE AVE SUITE 202A WESTPORT, CT 06880		PUBLIC	TO FUNDS PROGRAMS THAT HELP REDUCE POVERTY IN BRIDGEPORT	100
CITY OF HOPE 1500 EAST DUARTE ROAD DUARTE, CA 91010		PUBLIC	TO SUPPORT RESEARCH TO HELP FIGHT CANCER, DIABETES, AND OTHER DISEASES	72
CONGREGATION B'NAI ISRAEL 2710 PARK AVENUE BRIDGEPORT, CT 06604		PUBLIC	TO SUPPORT THE ACTIVITIES OF CONGREGATION B'NAI ISRAEL	250
Total . . . . ▶ **3a**				85,690

Form 990PF Part XV Line 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*				
COUNCIL ON FOREIGN RELATIONS INC 58 EAST 68TH STREET NEW YORK, NY 10065		PUBLIC	TO ASSIST WITH EFFORTS TO RAISE THE LEVEL OF FOREIGN POLICY AWARENESS	3,305
EDUCATIONAL EQUITY CENTER 100 FIFTH AVENUE 8TH FLOOR NEW YORK, NY 10011		PUBLIC	TO ASSIST WITH PROGRAMS THAT PROMOTE EDUCATIONAL EXCELLENCE FOR CHILDREN	50
GREENWICH LIBRARY 101 WEST PUTNAM AVENUE GREENWICH, CT 06830		PUBLIC	TO SUPPORT THE TOWN LIBRARY WITH FUNDS	150
HUMAN RIGHTS FIRST 333 SEVENTH AVENUE 13TH FLOOR NEW YORK, NY 10001		PUBLIC	TO SUPPORT THE MISSION TO BUILD RESPECT FOR HUMAN RIGHTS THROUGH PROGRAMS	250
JASA 247 WEST 37TH STREET NEW YORK, NY 10018		PUBLIC	TO SUSTAIN AND ENRICH THE LIVES OF THE AGING IN THE NY METROPOLITAN AREA	1,000
JEWISH FEDERATION OF GREENWICH ONE HOLLY HILL LANE GREENWICH, CT 06830		PUBLIC	TO SUPPORT AND STRENGTHEN THE JEWISH COMMUNITY HERE AND THROUGHOUT THE WORLD	500
JEWISH WOMEN'S FOUNDATION 130 EAST 59TH STREET NEW YORK, NY 10022		PUBLIC	SUPPORT PROGRAMS THAT ENSURE A HEALTHY AND SUPPORTIVE ENVIRONMENT FOR WOMEN	5,000
JUMPSTART FOR YOUNG CHILDREN 308 CONGRESS STREET 6TH FLOOR BOSTON, MA 02210		PUBLIC	HELP CHILDREN DEVELOP LANGUAGE AND LITERACY SKILLS NEEDED TO BE SUCCESSFUL	5,000
KIDS OF NYU 902 BROADWAY SUITE 1603 NEW YORK, NY 10003		PUBLIC	TO SUPPORT QUALITY RESEARCH, EDUCATION, AND CLINICAL CARE FOR CHILDREN	2,500
LAURA DWORKIN MEMORIAL ENDOWMENT FUND 1151 COLLEGE AVENUE COLUMBUS, OH 43209		PUBLIC	TO SUPPORT THE MISSION OF THE LAURA DWORKIN MEMORIAL ENDOWMENT FUND	50
MASS CHALLENGE ONE MARINA PARK DR 14TH FLOOR BOSTON, MA 02210		PUBLIC	PROVIDE EDUCATIONAL OPPORTUNITIES FOR ENTREPRENEURS	150
MOMA 11 WEST 53RD STREET NEW YORK, NY 10019		PUBLIC	SUPPORT THE MUSEUM TO SHARE ITS COLLECTIONS OF MODERN AND CONTEMPORARY ART	120
NA'AMAT USA 350 FIFTH AVENUE SUITE 4700 NEW YORK, NY 10118		PUBLIC	TO ENHANCE THE QUALITY OF LIFE FOR WOMEN, CHILDREN AND FAMILIES	50
NATIONAL AUDUBON SOCIETY 225 VARICK STREET NEW YORK, NY 10014		PUBLIC	TO HELP CONSERVE AND RESTORE NATURAL ECOSYSTEMS, FOCUSING ON BIRDS	105
NEW YORK PHILHARMONIC AVERY FISHER HALL 10 LINCOLN CENTER PLAZA NEW YORK, NY 10023		PUBLIC	TO SUPPORT EDUCATIONAL PROGRAMS	5,000
Total . . . . ▶ **3a**				85,690

Form 990PF Part XV Line 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*				
NY STAGE & FILM 214 WEST 29TH STREET SUITE 1001 NEW YORK, NY 10001		PUBLIC	TO SUPPORT THE DEVELOPMENT OF NEW PLAYS FOR AMERICAN THEATER	250
NYU STERN 44 WEST FOURTH STREET ROOM 10-46 NEW YORK, NY 10012		PUBLIC	TO SUPPORT THE EDUCATIONAL PROGRAMS THAT NURTURE FORWARD-THINKING LEADERS	5,000
PARK AVENUE ARMORY 643 PARK AVENUE NEW YORK, NY 10065		PUBLIC	SUPPORT THE DEVELOPMENT OF WORK IN THE VISUAL AND PERFORMING ARTS	8,140
PAWS 504 MAIN AVENUE NORWALK, CT 06851		PUBLIC	TO SUPPORT THE RESCUE OF HOMELESS ANIMALS AND PLACING THEM IN NEW HOMES	85
PMC 77 4TH AVENUE NEEDHAM, MA 02494		PUBLIC	TO SUPPORT CANCER RESEARCH AND TREATMENT AT DANA-FARBER CANCER INSTITUTE	100
ROUND HILL ASSOCIATION 397 ROUND HILL ROAD GREENWICH, CT 06831		PUBLIC	TO SUPPORT IMPROVEMENTS IN THE GREENWICH COMMUNITY	25
RUN TO STOP MS 733 THIRD AVENUE 3RD FLOOR NEW YORK, NY 10017		PUBLIC	TO SUPPORT THE EFFORTS TO HELP PEOPLE WITH MS AND THOSE WHO CARE FOR THEM	50
SILVER SCHOOL OF SOCIAL WORK 1 WASHINGTON SQUARE NORTH NEW YORK, NY 10003		PUBLIC	TO SUPPORT THE EDUCATION OF PROFESSIONAL SOCIAL WORKERS	1,960
SIMON WIESENTHAL CENTER 1399 SOUTH ROXBURY DRIVE LOS ANGELES, CA 90035		PUBLIC	TO SUPPORT THE EFFORTS TO CONFRONT ANTI-SEMITISM AND PROMOTE HUMAN RIGHTS	100
SISTERHOOD OF TEMPLE SHALOM 300 EAST PUTNAM AVENUE GREENWICH, CT 06830		PUBLIC	TO SUPPORT THE YOUTH, EDUCATION, AND SPECIAL PROJECTS OF THE TEMPLE	150
STAMFORD MUSEUM & NATURE CENTER 39 SCOFIELDTOWN ROAD STAMFORD, CT 06903		PUBLIC	TO SUPPORT THE PRESERVATION OF ART AND NATURAL AND AGRICULTURAL SCIENCES	205
STEPHEN GAYNOR SCHOOL 148 WEST 90TH STREET NEW YORK, NY 10024		PUBLIC	SUPPORT UNIQUE EDUCATIONAL PROGRAMS FOR CHILDREN WITH LEARNING DIFFERENCES	1,000
TEMPLE ISRAEL 14 COLEYTOWN ROAD WESTPORT, CT 06880		PUBLIC	SUPPORT THE TEMPLE AND ITS CONGREGATION IN ACQUIRING JEWISH KNOWLEDGE	3,080
TEMPLE SHOLOM 300 EAST PUTNAM AVENUE GREENWICH, CT 06830		PUBLIC	SUPPORT THE TEMPLE AND ITS PROGRAMS	22,767
THE BRONX CHARTER SCHOOL FOR CHILDREN 388 WILLIS AVENUE BRONX, NY 10454		PUBLIC	TO HELP EDUCATE THE CHILDREN TO ACHIEVE THEIR GREATEST POTENTIAL	200
Total . . . . ▶ 3a				85,690

Form 990PF Part XV Line 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*				
THE CENTER FOR DISCOVERY PO BOX 840 HARRIS, NY 12742		PUBLIC	TO SUPPORT THE SERVICES TO CHILDREN AND ADULTS WITH SEVERE DISABILITIES	6,000
THE GOOD DOG FOUNDATION PO BOX 1484 NEW YORK, NY 10276		PUBLIC	TO HELP PROMOTE THE USE OF ANIMAL-ASSISTED THERAPY	350
THE NATURE CONSERVANCY 4245 N FAIRFAX DRIVE 100 ARLINGTON, VA 22203		PUBLIC	HELP PROTECT ECOLOGICALLY IMPORTANT LANDS AND WATERS FOR NATURE AND PEOPLE	50
THE OPPORTUNITY NETWORK 381 PARK AVENUE SOUTH SUITE 1401 NEW YORK, NY 10016		PUBLIC	TO HELP CREATE CAREER OPPORTUNITES FOR HIGH SCHOOL AND COLLEGE STUDENTS	500
THE RIEDEL & CODY FUND PO BOX 320037 FAIRFIELD, CT 06825		PUBLIC	PROVIDE SUPPORT FOR PEOPLE WHOSE PETS ARE SUFFERING WITH CANCER	50
TURNAROUND FOR CHILDREN 25 WEST 45TH STREET 6TH FLOOR NEW YORK, NY 10036		PUBLIC	HELPING HIGH-POVERTY, LOW-PERFORMING PUBLIC SCHOOLS	1,500
UJA-FEDERATION OF NEW YORK 130 EAST 59TH STREET NEW YORK, NY 10022		PUBLIC	HELP INSPIRE A PASSION FOR JEWISH LIFE AND LEARNING AND HELP THOSE IN NEED	575
WNYC 160 VARICK STREET NEW YORK, NY 10013		PUBLIC	TO SUPPORT THE SERVICES OF THE NEW YORK PUBLIC RADIO	100
WORLD WILDLIFE FUND 1250 24TH STREET NW WASHINGTON, DC 20090		PUBLIC	TO SUPPORT THE MISSION TO CONSERVE NATURE	26
ANDREA LANG FUND 653 PASEO NUEVO SANTA BARBARA, CA 93101		PUBLIC	SUPPORT INNOVATIVE INTERACTIONS AMONG ARTISTS, STUDENTS AND CULTURAL ORG	100
Total . . . . ▶ **3a**				85,690

TY 2010 Investments - Other Schedule

Name: ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
VARIOUS PUBLICLY TRADED SECURITIES	AT COST	222,995	303,924

TY 2010 Other Expenses Schedule

Name: ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	2,916	2,916		0
ADR FEES	17	17		0

TY 2010 Taxes Schedule

Name: ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	24	24		0