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**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

2010

For calendar year 2010, or tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

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

Name of foundation <b>The Fogelson Foundation</b>		A Employer identification number <b>20-2902485</b>
Number and street (or P O box number if mail is not delivered to street address) <b>1455 S Michigan Avenue</b>		Room/suite <b>(312) 986-6823</b>
City or town, state, and ZIP code <b>Chicago IL 60605</b>		
<p>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</p>		
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ► \$ <b>4,154,432</b>	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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	<p>1 Contributions, gifts, grants, etc., received (attach schedule)</p> <p>2 Check ► <input type="checkbox"/> if the foundation is not required to attach Sch B</p> <p>3 Interest on savings and temporary cash investments</p> <p>4 Dividends and interest from securities</p> <p>5 a Gross rents</p> <p>b Net rental income or (loss) _____</p> <p>6 a Net gain or (loss) from sale of assets not on line 10</p> <p>b Gross sales price for all assets on line 6a <b>3,384,360</b></p> <p>7 Capital gain net income (from Part IV, line 2)</p> <p>8 Net short-term capital gain</p> <p>9 Income modifications</p> <p>10 a Gross sales less returns and allowances</p> <p>b Less Cost of goods sold</p> <p>c Gross profit or (loss) (attach schedule)</p> <p>11 Other income (attach schedule)</p> <p>12 Total. Add lines 1 through 11</p>	170,000	177	118,289	118,289
		-965,804	0	39	-677,299
		118,505			
Operating and Administrative Expenses	<p>13 Compensation of officers, directors, trustees, etc</p> <p>14 Other employee salaries and wages</p> <p>15 Pension plans, employee benefits</p> <p>16 a Legal fees (attach schedule)</p> <p>b Accounting fees (attach schedule)</p> <p>c Other professional fees (attach schedule)</p> <p>17 Interest</p> <p>18 Taxes (attach schedule) (see page 14 of the instructions)</p> <p>19 Depreciation (attach schedule) and depletion</p> <p>20 Occupancy</p> <p>21 Travel, conferences, and meetings</p> <p>22 Printing and publications</p> <p>23 Other expenses (attach schedule)</p> <p>24 Total operating and administrative expenses.</p> <p>Add lines 13 through 23 <b>57,189</b></p> <p>25 Contributions, gifts, grants paid <b>353,950</b></p> <p>26 Total expenses and disbursements Add lines 24 and 25 <b>411,139</b></p> <p>27 Subtract line 26 from line 12</p> <p>a Excess of revenue over expenses and disbursements <b>-1,088,438</b></p> <p>b Net investment income (if negative, enter -0-) <b>81,979</b></p> <p>c Adjusted net income (if negative, enter -0-) _____</p>	35,288	1,170	68	20,363
		35,288			
		1,170			
		68			
		20,363			
		353,950			
		374,313			
		81,979			

For Paperwork Reduction Act Notice, see page 30 of the instructions.

(HTA)

Form 990-PF (2010)

G-18  
20

<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )		<b>Beginning of year</b>	<b>End of year</b>	
		<b>(a) Book Value</b>	<b>(b) Book Value</b>	<b>(c) Fair Market Value</b>
<b>Assets</b>	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	885,182	62,982	62,982
	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			
	10 a Investments—U S and state government obligations (attach schedule) . . .	498,580	377,777	391,737
	b Investments—corporate stock (attach schedule) . . .	3,236,065	3,298,434	3,592,626
	c Investments—corporate bonds (attach schedule) . . .	315,380	107,576	107,087
	11 Investments—land, buildings, and equipment basis ►			
Less accumulated depreciation (attach schedule) ►				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)				
14 Land, buildings, and equipment basis ►				
Less accumulated depreciation (attach schedule) ►				
15 Other assets (describe ► )				
16 <b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	4,935,207	3,846,769	4,154,432	
<b>Liabilities</b>	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 ► )	0	0	
23 <b>Total liabilities</b> (add lines 17 through 22)	0	0		
<b>Net Assets or Fund Balances</b>	24 Foundations that follow SFAS 117, check here ► <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31.			
	25 Unrestricted			
	26 Temporarily restricted			
	27 Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	28 Permanently restricted			
	29 Capital stock, trust principal, or current funds			
	30 Paid-in or capital surplus, or land, bldg , and equipment fund			
	31 Retained earnings, accumulated income, endowment, or other funds	4,935,207	3,846,769	
30 <b>Total net assets or fund balances</b> (see page 17 of the instructions)	4,935,207	3,846,769		
31 <b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions)	4,935,207	3,846,769		

**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	4,935,207
2 Enter amount from Part I, line 27a	2	-1,088,438
3 Other increases not included in line 2 (itemize) ►	3	
4 Add lines 1, 2, and 3	4	3,846,769
5 Decreases not included in line 2 (itemize) ►	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,846,769

**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.)
<b>1a Publicly-traded Securities</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>(e) Gross sales price</b>	<b>(f) Depreciation allowed (or allowable)</b>	<b>(g) Cost or other basis plus expense of sale</b>	<b>(h) Gain or (loss) (e) plus (f) minus (g)</b>	
<b>a</b> 3,384,360		4,350,164	-965,804	
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
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))	
<b>(i) F M V as of 12/31/69</b>	<b>(j) Adjusted basis as of 12/31/69</b>	<b>(k) Excess of col (i) over col (j), if any</b>		
<b>a</b>			-965,804	
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2 Capital gain net income or (net capital loss)</b>	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		<b>2</b>	-965,804
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)</b> 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	{ }		<b>3</b>	

**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	318,009	3,268,702	0.097289
2008	329,425	4,368,666	0.075406
2007	354,440	3,649,639	0.097116
2006	260,633	1,035,841	0.251615
2005	99,200	414,331	0.239422

2 Total of line 1, column (d)

3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years

4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5

5 Multiply line 4 by line 3

6 Enter 1% of net investment income (1% of Part I, line 27b)

7 Add lines 5 and 6

8 Enter qualifying distributions from Part XII, line 4

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

<b>2</b>	0.760848
<b>3</b>	0.152170
<b>4</b>	3,977,501
<b>5</b>	605,256
<b>6</b>	820
<b>7</b>	606,076
<b>8</b>	374,313

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)**1 a 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

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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)

5 **Tax based on Investment Income.** Subtract line 4 from line 3 If zero or less, enter -0-

6 Credits/Payments

a 2010 estimated tax payments and 2009 overpayment credited to 2010 .

b Exempt foreign organizations—tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

7 Total credits and payments Add lines 6a through 6d

8 Enter any **penalty** for underpayment of estimated tax Check here  if Form 2220 is attached9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed**10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**11 Enter the amount of line 10 to be **Credited to 2011 estimated tax** ►

41

Refunded ►

6a	1,059
6b	
6c	622
6d	

7	1,681
8	0
9	0
10	41
11	0

**Part VII-A Statements Regarding Activities**

1 a 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?

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)?

*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?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year

(1) On the foundation ► \$ \_\_\_\_\_ (2) On foundation managers ► \$ \_\_\_\_\_

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ \_\_\_\_\_

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*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*

4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

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*

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?

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*

8 a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ► IL

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 explanation9 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*10 Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*

	Yes	No
1a	X	
1b	X	
1c	X	
2	X	
3	X	
4a	X	
4b	N/A	
5	X	
6	X	
7	X	
8b	X	
9	X	
10	X	

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11	X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12	X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X
14	The books are in care of ► Gerald W. Fogelson Located at ► 1455 S. Michigan Avenue Chicago IL	Telephone no ► (312) 986-6823	ZIP+4 ► 60605
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	►
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? 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 ►	16	Yes X No

**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
<b>1a</b>	During the year did the foundation (either directly or indirectly)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(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>b</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 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ►	1b	N/A
<b>c</b>	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	X
<b>2</b>	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))		
<b>a</b>	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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	If "Yes," list the years ► 20 , 20 , 20 , 20		
<b>b</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 22 of the instructions)	2b	N/A
<b>c</b>	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		
<b>3a</b>	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>b</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	N/A
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
<b>b</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	X

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

<b>5a</b> 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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
<b>b</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)? Organizations relying on a current notice regarding disaster assistance check here ►	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<b>5b</b>	N/A
<b>c</b> 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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<b>6b</b>	X
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870</i>	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<b>7b</b>	N/A
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?				

**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
SEE ATTACHMENT .....				
.....				
.....				
.....				
.....				

**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 .....				
.....				
.....				
.....				
.....				
<b>Total number of other employees paid over \$50,000</b>				►

**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 ►**
**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	
<b>Total. Add lines 1 through 3 ►</b>	<b>0</b>

**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 3,768,501
b	Average of monthly cash balances	1b 269,571
c	Fair market value of all other assets (see page 25 of the instructions)	1c 0
d	<b>Total</b> (add lines 1a, b, and c)	1d 4,038,072
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e
2	Acquisition indebtedness applicable to line 1 assets	2
3	Subtract line 2 from line 1	3 4,038,072
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4 60,571
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5 3,977,501
6	<b>Minimum investment return.</b> Enter 5% of line 5	6 198,875

**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	1 198,875
2a	Tax on investment income for 2010 from Part VI, line 5	2a 1,640
b	Income tax for 2010 (This does not include the tax from Part VI )	2b 0
c	Add lines 2a and 2b	2c 1,640
3	Distributable amount before adjustments Subtract line 2c from line 1	3 197,235
4	Recoveries of amounts treated as qualifying distributions	4 0
5	Add lines 3 and 4	5 197,235
6	Deduction from distributable amount (see page 25 of the instructions)	6
7	<b>Distributable amount as adjusted</b> Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7 197,235

**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 374,313
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 0
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 0
4	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4 374,313
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	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6 374,313

**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				197,235
2 Undistributed income, if any, as of the end of 2010			0	
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	86,259			
b From 2006	208,945			
c From 2007	189,877			
d From 2008	112,423			
e From 2009	155,617			
f Total of lines 3a through e	753,121			
4 Qualifying distributions for 2010 from Part XII, line 4 ► \$ 374,313			0	
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)				
d Applied to 2010 distributable amount				197,235
e Remaining amount distributed out of corpus	177,078			
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:	930,199		0	
a Corpus Add lines 3f, 4c, and 4e Subtract line 5			0	
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount—see 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				
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)	86,259			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	843,940			
10 Analysis of line 9				
a Excess from 2006	208,945			
b Excess from 2007	189,877			
c Excess from 2008	112,423			
d Excess from 2009	155,617			
e Excess from 2010	177,078			



**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)				
<b>a Paid during the year</b>				
AMERICAN NATIONAL RED CROSS 17TH D STS NW WASHINGTON DC 20006	N/A	509(a)(1)	Haitian Earthquake Victims Fund	1,000
AUDITORIUM THEATRE OF ROOSEVELT UNIV. 50 E CONGRESS PKWY CHICAGO IL 60605	N/A	509(a)(1)	Hands Together, Heart to Art Summer Camp 2010 Program	500
AUDITORIUM THEATRE OF ROOSEVELT UNIV 50 E CONGRESS PKWY CHICAGO IL 60605	N/A	509(a)(1)	Charitable Event	1,000
CHICAGO WILDERNESS TRUST 8 S MICHIGAN AVE STE 900 CHICAGO IL 60603	N/A	509(a)(1)	General & Unrestricted	15,000
CHILDREN AT THE CROSSROADS FDN 751 N STATE ST CHICAGO IL 60654	N/A	509(a)(1)	General & Unrestricted	10,000
CIRCLE OF FRIENDS 709-48TH ST WESTERN SPRINGS IL 60558	N/A	509(a)(1)	Ray Graham Training Center Project	100
CLEARBROOK 1835 W CENTRAL RD ARLINGTON HTS IL 60005	N/A	509(a)(1)	General & Unrestricted	10,000
COLLEGE OF THE DESERT FOUNDATION 43500 MONTEREY AVE PALM DESERT CA 92260	N/A	509(a)(1)	College of the Desert Real Estate Program	5,000
COLUMBIA COLLEGE 600 S MICHIGAN CHICAGO IL 60605	N/A	509(a)(1)	Georgia B Fogelson 25th Anniversary Scholarship	25,000
DELTA INSTITUTE 53 W JACKSON BLVD CHICAGO IL 60604	N/A	509(a)(1)	Green Business Development Center Division	10,000
FRIENDS OF PAYTON ASSOCIATION 1034 N WELLS ST CHICAGO IL 60610	N/A	509(a)(2)	General & Unrestricted	5,000
<b>Total</b>	See Attached Statement		► 3a	353,950
<b>b Approved for future payment</b>				
<b>Total</b>			► 3b	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

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 )
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
<b>1 Program service revenue</b>					
a					
b					
c					
d					
e					
f					
<b>g Fees and contracts from government agencies</b>					
<b>2 Membership dues and assessments</b>					
<b>3 Interest on savings and temporary cash investments</b>			14	177	
<b>4 Dividends and interest from securities</b>			14	118,289	
<b>5 Net rental income or (loss) from real estate</b>					
a Debt-financed property					
b Not debt-financed property					
<b>6 Net rental income or (loss) from personal property</b>					
<b>7 Other investment income</b>					
<b>8 Gain or (loss) from sales of assets other than inventory</b>			18	-965,804	
<b>9 Net income or (loss) from special events</b>					
<b>10 Gross profit or (loss) from sales of inventory</b>					
<b>11 Other revenue</b> a <u>Foreign Tax Refund</u>			01	39	
b					
c					
d					
e					
<b>12 Subtotal Add columns (b), (d), and (e)</b>		0		-847,299	0
<b>13 Total Add line 12, columns (b), (d), and (e)</b>			13		-847,299

(See worksheet in line 13 instructions on page 29 to verify calculations )

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



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

**Schedule of Contributors**

OMB No 1545-0047

**2010**

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

Name of the organization

The Fogelson Foundation

Employer identification number

20-2902485

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 line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

## Name of organization

The Fogelson Foundation

## Employer identification number

20-2902485

**Part I** **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Fogelson, Gerald W 1455 South Michigan Avenue Chicago IL 60605 Foreign State or Province: _____ Foreign Country: _____	\$ 170,000	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II if there is a noncash contribution)</small>
2	_____ Foreign State or Province: _____ Foreign Country: _____	\$ 0	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II if there is a noncash contribution)</small>
3	_____ Foreign State or Province: _____ Foreign Country: _____	\$ 0	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II if there is a noncash contribution)</small>
4	_____ Foreign State or Province: _____ Foreign Country: _____	\$ 0	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II if there is a noncash contribution)</small>
5	_____ Foreign State or Province: _____ Foreign Country: _____	\$ 0	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II if there is a noncash contribution)</small>
6	_____ Foreign State or Province: _____ Foreign Country: _____	\$ 0	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II if there is a noncash contribution)</small>

Name of organization

The Fogelson Foundation

Employer identification number

20-2902485

**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
		\$ 0	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$ 0	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$ 0	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$ 0	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$ 0	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$ 0	

## Name of organization

The Fogelson Foundation

## Employer identification number

20-2902485

**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) ► \$

0

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

**Form 990-PF, Part I, Line 11 - Other Income**

	<b>TOTAL:</b>	39	39	39
		(a) Revenue per Books	(b) Net Investment Income	
<b>1</b>	Foreign Tax Refund	39	39	39
<b>2</b>				
<b>3</b>				
<b>4</b>				
<b>5</b>				
<b>6</b>				
<b>7</b>				
<b>8</b>				
<b>9</b>				
<b>10</b>				

**Form 990-PF, Part I, Line 16c - Other Professional Fees**

	<b>TOTAL:</b>	<b>35,288</b>	<b>35,288</b>	<b>0</b>
	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose
1	Investment Management Services	35,288	35,288	0
2				
3				
4				
5				
6				
7				
8				
9				
10				

**Form 990-PF, Part I, Line 18 - Taxes**

	<b>TOTAL:</b>	1,470	1,170	0	0
		(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose
1	Estimated Tax for 2010		300	0	0
2	Foreign Tax Paid		1,170	1,170	0
3					
4					
5					
6					
7					
8					
9					
10					

**Form 990-PF, Part I, Line 23 - Other Expenses**

	<b>TOTAL:</b>	<b>20,431</b>	<b>68</b>	<b>0</b>	<b>20,363</b>
		<b>(a)</b> Expenses per Books	<b>(b)</b> Net Investment Income	<b>(c)</b> Adjusted Net Income	<b>(d)</b> Charitable Purpose
<b>1</b>	<b>Administrative Fees</b>	<b>20,313</b>	<b>0</b>	<b>0</b>	<b>20,313</b>
<b>2</b>	<b>Bank Charges</b>	<b>68</b>	<b>68</b>	<b>0</b>	<b>0</b>
<b>3</b>	<b>Postage fees</b>	<b>19</b>	<b>0</b>	<b>19</b>	<b>19</b>
<b>4</b>	<b>State or local filing fees</b>	<b>31</b>	<b>0</b>	<b>31</b>	<b>31</b>
<b>5</b>					
<b>6</b>					
<b>7</b>					
<b>8</b>					
<b>9</b>					
<b>10</b>					

**Form 990-PF, Part II, Line 10a - Investments: US & State Government Obligations**

	Description/Symbol/CUSIP Number	TOTAL:	359,642	(b) Shares	377,777 Book Value	(c) Fair Market Value	391,737
1	US TIPS - 1 750% - 01/15/2028 (912810PV4)			78,564	79,191	80,307	
2	US TIPS - 2 375% - 01/15/2017 (912828GD6)			81,078	89,832	90,503	
3	US TREAS NOTE - 2 500% - 03/31/2015 (912828MW7)			50,000	49,871	51,789	
4	US TREAS NOTE - 4 250% - 08/15/2014 (912828CT5)			75,000	77,508	82,688	
5	US TREAS NOTE - 5 125% - 05/15/2016 (912828FF2)			75,000	81,375	86,450	
6							
7							
8							
9							
10							

## Form 990-PF, Part II, Line 10b - Investments: Corporate Stock

	Description/Symbol/CUSIP Number	Shares	(b) Book Value	(c) Fair Market Value	TOTAL: 3,298,434	3,592,626
1	3M CO (MMM)	300	23,630	25,890		
2	ABBOTT LABS (ABT)	600	30,236	28,746		
3	AFLAC INC (AFL)	500	25,001	28,215		
4	APPLE INC (AAPL)	100	12,339	32,256		
5	BAKER HUGHES INTL (BHI)	700	30,180	40,019		
6	BERKSHIRE HATHAWAY INC CLASS B (BRK-B)	522	34,545	41,817		
7	CARNIVAL CORP (CCL)	473	15,405	21,810		
8	CHEVRONTEXACO CORP (CVX)	400	31,180	36,500		
9	CISCO SYSTEMS INC (CSCO)	2,000	43,946	40,460		
10	CONOCOPHILLIPS (COP)	600	34,159	40,860		
11	CVS CAREMARK CORP (CVS)	1,000	29,676	34,770		
12	DIAGEO PLC ADS (DEO)	510	34,582	37,908		
13	ECCOLAB INC (ECL)	700	34,006	35,294		
14	FRANCO NEVADA CORP (FNNVF PK)	89	2,633	2,979		
15	GATEWAY FUND CLASS Y (GTEYX)	3,955	100,000	103,055		
16	GENERAL ELECTRIC CO (GE)	2,000	31,873	36,580		
17	GENZYME CORP (GENZ)	400	25,055	28,480		
18	GOOGLE INC CL A (GOOG)	60	29,624	35,638		
19	HENDERSON LAND DEV (HLDWVF)	500	0	116		
20	HEWLETT PACKARD CO (HPQ)	800	33,810	33,680		
21	HIGHBRIDGE STATISTICAL MARKET NEUTRAL SELECT (HSKSX)	7,843	120,000	118,903		
22	HOME DEPOT INC (HD)	1,000	30,930	35,060		
23	HUSSMAN STRATEGIC GROWTH FD (HSGFX)	9,145	120,000	112,394		
24	INTERNATIONAL BUSINESS MACHINES (IBM)	310	36,906	45,496		
25	IPATH DJ AIG CITR ETN (DJP)	5,000	208,802	245,600		
26	IRON MOUNTAIN NEW (IRM)	1,500	32,461	37,515		
27	ISHARES iBOXX \$ INVESTMENT GRADE CORPORATE BOND FD (LQD)	1,668	175,064	180,878		
28	JOHNSON & JOHNSON (JNJ)	600	35,531	37,110		
29	JP MORGAN CHASE & CO (JPM)	870	33,748	36,905		
30	KRAFT FOODS INC (KFT)	1,000	29,808	31,510		
31	L-3 COMMUNICATIONS CORP (LLL)	450	32,564	31,721		
32	MCDONALD'S CORP (MCD)	400	26,436	30,704		
33	MERGER FUND-SBI (MERFX)	6,305	100,000	99,500		
34	MICROSOFT CORPORATION (MSFT)	1,500	36,836	41,865		
35	MORGAN STANLEY (MS)	1,000	26,484	27,210		
36	NATIONAL GRID TRANSCO PLC (NGG)	3	108	133		
37	NESTLE SA (NSRGY PK)	500	24,681	29,410		
38	NOVARTIS AG ADR (NVS)	500	25,235	29,475		
39	PAYCHEX INC COM (PAYX)	1,000	25,567	30,910		
40	PIMCO EMERGING LOCAL BD FD INSTI CL (PELBX)	9,390	100,000	100,000		
41	PIMCO FD PAC INV MGMT FOREIGN (PFIUX)	18,553	199,999	195,733		

**Form 990-PF, Part II, Line 10b - Investments: Corporate Stock**

	Description/Symbol/CUSIP Number	Shares	(b) Book Value	(c) Fair Market Value	TOTAL: 3,298,434	3,592,626
42	PIMCO TOTAL RETURN FUND (PTTRX)	15,065	164,654	163,452		
43	POTASH CORPORATION OF SASKATCHEWAN INC (POT)	210	26,108	32,514		
44	PROCTER GAMBLE CO (PG)	600	36,672	38,598		
45	QUALCOMM INC (QCOM)	700	28,918	34,643		
46	SCHLUMBERGER LTD (SLB)	433	29,440	36,156		
47	TARGET CORPORATION (TGT)	600	32,244	36,078		
48	TEVA PHARMACEUTICAL SP ADR (TEVA)	693	30,887	36,126		
49	UNION PACIFIC (UNP)	350	26,578	32,431		
50	UNITED PARCEL SERVICE (UPS)	500	33,979	36,290		
51	UNITED TECHNOLOGIES CORP (UTX)	500	36,044	39,360		
52	US BANCORP DEL NEW (USB)	1,000	23,103	26,970		
53	VANGUARD EMERGING MARKETS STOCK INDEX VIPERS (VWO)	4,000	168,926	192,600		
54	VANGUARD MID-CAP ETF (VO)	1,700	105,978	126,582		
55	VANGUARD MSCI EUROPEAN ETF (VGK)	2,000	91,650	98,180		
56	VANGUARD MSCI PACIFIC ETF (VPL)	2,500	128,028	142,600		
57	VANGUARD SHORT TERM BOND INDEX FUND SIGNAL SHARES (VBSSX)	9,407	100,000	99,247		
58	VANGUARD SM-CAP ETF (VB)	1,000	58,940	72,630		
59	VERIZON COMMUNICATIONS (VZ)	1,000	29,901	35,780		
60	VISA INC (V)	500	36,220	35,190		
61	VODAFONE GROUP PLC (VOD)	1,200	28,590	31,728		
62	WAL-MART STORES INC (WMT)	600	30,758	32,358		
63	WALT DISNEY HOLDINGS CO (DIS)	800	27,776	30,008		

**Form 990-PF, Part II, Line 10c - Investments: Corporate Bonds**

	Description/Symbol/CUSIP Number	Shares	(b) Book Value	(c) Fair Market Value	TOTAL:
1	BERKSHIRE HATHAWAY FIN - 4 850% - 01/15/2015 (084664AT8)	25,000	26,218	27,408	107,576
2	PEPSICO INC SR NT - 5 150% - 05/15/2012 (713448BF4)	25,000	27,391	26,426	107,576
3	WALT DISNEY CO NTS - 6 3750% - 03/01/2012 (25468PBX3)	50,000	53,967	53,253	107,087
4					
5					
6					
7					
8					
9					
10					

**Form 990-PF, Part VIII, Line 1 - Compensation of Officers, Directors, Trustees and Foundation Managers**

	Name	Street	City	State	Zip Code	Title	Avg Hrs	Comp	Benefits	Expense Account
1	Douglas Donenfeld	1455 S Michigan Avenue	Chicago	IL	60605	Director	1	0	0	0
2	Georgia B Fogelson	1455 S Michigan Avenue	Chicago	IL	60605	Director	1	0	0	0
3	Gerald W Fogelson	1455 S Michigan Avenue	Chicago	IL	60605	President	1	0	0	0
4	Richard Levy	1455 S Michigan Avenue	Chicago	IL	60605	Director	1	0	0	0
5	Edward H Lowery	1455 S Michigan Avenue	Chicago	IL	60605	Treasurer	1	0	0	0
6										
7										
8										
9										
10										

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

FRIENDS OF THE PARKS

**Street**

17 N STATE ST STE 1450

City CHICAGO	State IL	Zip Code 60602	Foreign Country
-----------------	-------------	-------------------	-----------------

Relationship N/A	Foundation Status 509(a)(1)	Amount
---------------------	--------------------------------	--------

Purpose of grant/contribution Michael W Scott Grove Fund	Amount 200
-------------------------------------------------------------	---------------

**Name**

HABITAT FOR HUMANITY INTERNATIONAL

**Street**

6114 W RIDGE RD

City GARY	State IN	Zip Code 46408	Foreign Country
--------------	-------------	-------------------	-----------------

Relationship N/A	Foundation Status 509(a)(1)	Amount
---------------------	--------------------------------	--------

Purpose of grant/contribution General & Unrestricted	Amount 1,000
---------------------------------------------------------	-----------------

**Name**

JEWISH FAMILY SERVICE OF THE DESERT

**Street**

801 E TAHQUITZ CANYON WAY STE 202

City PALM SPRINGS	State CA	Zip Code 92262	Foreign Country
----------------------	-------------	-------------------	-----------------

Relationship N/A	Foundation Status 509(a)(1)	Amount
---------------------	--------------------------------	--------

Purpose of grant/contribution General & Unrestricted	Amount 2,500
---------------------------------------------------------	-----------------

**Name**

JEWISH FAMILY SERVICE OF THE DESERT

**Street**

801 E TAHQUITZ CANYON WAY STE 202

City PALM SPRINGS	State CA	Zip Code 92262	Foreign Country
----------------------	-------------	-------------------	-----------------

Relationship N/A	Foundation Status 509(a)(1)	Amount
---------------------	--------------------------------	--------

Purpose of grant/contribution Holiday Gifting Program	Amount 6,000
----------------------------------------------------------	-----------------

**Name**

JEWISH FEDERATION OF PALM SPRINGS AND DESERT AREA

**Street**

69-930 HWY 111, STE 204

City RANCHO MIRAGE	State CA	Zip Code 92270	Foreign Country
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Relationship N/A	Foundation Status 509(a)(1)	Amount
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Purpose of grant/contribution General & Unrestricted	Amount 2,000
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**Name**

JEWISH UNITED FUND OF METROPOLITAN CHICAGO

**Street**

BEN GURION WAY

City CHICAGO	State IL	Zip Code 60606	Foreign Country
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Relationship N/A	Foundation Status 509(a)(1)	Amount
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Purpose of grant/contribution General & Unrestricted	Amount 10,000
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**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year****Recipient(s) paid during the year****Name**

MARWEN FOUNDATION

**Street**

833 N ORLEANS ST FL 1

City CHICAGO	State IL	Zip Code 60610	Foreign Country
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Relationship N/A	Foundation Status 509(a)(1)	Amount
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Purpose of grant/contribution General & Unrestricted	Amount 5,000
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Name MERCY FOUNDATION INC
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Street 2525 S MICHIGAN AVE
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City CHICAGO	State IL	Zip Code 60616	Foreign Country
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Relationship N/A	Foundation Status 509(a)(1)	Amount
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Purpose of grant/contribution Charitable Event	Amount 5,000
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Name MOTHERS AGAINST DRUNK DRIVING
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Street 511 E JOHN CARPENTER FREEWAY
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City IRVING	State TX	Zip Code 75062	Foreign Country
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Relationship N/A	Foundation Status 509(a)(1)	Amount
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Purpose of grant/contribution Team Lov2NAT	Amount 250
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Name NOBLE NETWORK OF CHARTER SCHOOLS
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Street 1010 N NOBLE ST
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City CHICAGO	State IL	Zip Code 60622	Foreign Country
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Relationship N/A	Foundation Status 509(a)(1)	Amount
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Purpose of grant/contribution College Preparedness Classes Initiative	Amount 10,000
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Name PACTT LEARNING CENTER
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Street 7101 N GREENVIEW AVE
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City CHICAGO	State IL	Zip Code 60626	Foreign Country
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Relationship N/A	Foundation Status 509(a)(1)	Amount
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Purpose of grant/contribution General & Unrestricted	Amount 10,000
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Name PALM SPRINGS ART MUSEUM
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Street PO BOX 2310
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City PALM SPRINGS	State CA	Zip Code 92263	Foreign Country
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Relationship N/A	Foundation Status 509(a)(1)	Amount
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Purpose of grant/contribution Annual Imagine the Possibilities Fund	Amount 25,000
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**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

Name

PALM SPRINGS ART MUSEUM

Street

PO BOX 2310

City

PALM SPRINGS

State

CA

Zip Code

92263

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution	Amount
Aperture - Artist In Residence Project	1,000

Name

PALM SPRINGS ART MUSEUM

Street

PO BOX 2310

City

PALM SPRINGS

State

CA

Zip Code

92263

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution	Amount
Imagine the Possibilities Project	25,000

Name

PALM SPRINGS ART MUSEUM

Street

PO BOX 2310

City

PALM SPRINGS

State

CA

Zip Code

92263

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution	Amount
Art Scholarship	1,000

Name

PALM SPRINGS ART MUSEUM

Street

PO BOX 2310

City

PALM SPRINGS

State

CA

Zip Code

92263

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution	Amount
Fine Arts Creativity Award Scholarship	20,000

Name

PAYTON PREP INITIATIVE FOR EDUCATION

Street

1034 N WELLS ST

City

CHICAGO

State

IL

Zip Code

60610

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution	Amount
General & Unrestricted	10,000

Name

ROOSEVELT UNIVERSITY

Street

430 S MICHIGAN AVE 801

City

CHICAGO

State

IL

Zip Code

60605

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution	Amount
Gerald W Fogelson Chair Division	25,000

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

ROOSEVELT UNIVERSITY

**Street**

430 S MICHIGAN AVE 801

City CHICAGO	State IL	Zip Code 60605	Foreign Country
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**Relationship**

N/A

**Foundation Status**

509(a)(1)

Purpose of grant/contribution	Amount
Gerald W Fogelson Chair Fund	50,000

**Name**

ST BALDRICKS FOUNDATION INC

**Street**

1333 S MAYFLOWER AVE STE 400

City MOROVIA	State CA	Zip Code 91016	Foreign Country
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**Relationship**

N/A

**Foundation Status**

509(a)(1)

Purpose of grant/contribution	Amount
Charitable Event	400

**Name**

STROKE RECOVERY CENTER

**Street**

2800 E ALEJO RD

City PALM SPRINGS	State CA	Zip Code 92262	Foreign Country
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**Relationship**

N/A

**Foundation Status**

509(a)(1)

Purpose of grant/contribution	Amount
Winter Wonderland Ball Tribute Book	500

**Name**

THE BARBARA SINATRA CHILDRENS CENTER AT EISENHOWER

**Street**

39000 BOB HOPE DR

City RANCHO MIRAGE	State CA	Zip Code 92270	Foreign Country
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**Relationship**

N/A

**Foundation Status**

509(a)(1)

Purpose of grant/contribution	Amount
Aunts Club Program	1,000

**Name**

THE MUSICAL ARTS ASSOCIATION

**Street**

11001 EUCLID AVE

City CLEVELAND	State OH	Zip Code 44106	Foreign Country
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**Relationship**

N/A

**Foundation Status**

509(a)(1)

Purpose of grant/contribution	Amount
Annual Fund	10,000

**Name**

TOOLS FOR TOMORROW INC

**Street**

42-800 BOB HOPE DR STE 209-0

City RANCHO MIRAGE	State CA	Zip Code 92270	Foreign Country
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**Relationship**

N/A

**Foundation Status**

509(a)(1)

Purpose of grant/contribution	Amount
General & Unrestricted	3,000

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

UNITED CEREBRAL PALSY ASSOCIATION OF GREATER CHICAGO

**Street**

547 W JACKSON, STE 225

City CHICAGO	State IL	Zip Code 60661	Foreign Country
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**Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Ramp-up Division

**Amount**

10,000

**Name**

YOUNG WOMENS LEADERSHIP CHARTER SCHOOL OF CHICAGO

**Street**

2641 S CALUMET AVE

City CHICAGO	State IL	Zip Code 60616	Foreign Country
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**Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

12,500

**Name**

YOUNG WOMENS LEADERSHIP CHARTER SCHOOL OF CHICAGO

**Street**

2641 S CALUMET AVE

City CHICAGO	State IL	Zip Code 60616	Foreign Country
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**Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Georgia B. Fogelson 25th Anniversary Scholarship

**Amount**

25,000

**Name****Street**

City	State	Zip Code	Foreign Country
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Relationship	Foundation Status
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**Purpose of grant/contribution****Amount**

0

**Name****Street**

City	State	Zip Code	Foreign Country
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Relationship	Foundation Status
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**Purpose of grant/contribution****Amount**

0

**Name****Street**

City	State	Zip Code	Foreign Country
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Relationship	Foundation Status
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**Purpose of grant/contribution****Amount**

0