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Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

2010

Department of the Treasury
Internal Revenue Service

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

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

G Check all that apply

Initial return

Initial Return of a former public charity

Final return

Amended return

Address change

Name change

A. L. LURIA & JENNIE L. LURIA FOUNDATION
C/O COZEN O'CONNOR 1900 MARKET ST.
PHILADELPHIA, PA 19103

A Employer identification number

23-6255232

B Telephone number (see the instructions)

(215) - 665-3733

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.

X 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, column (c), line 16)

\$ 1,381,118.

J Accounting method X 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 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 (att sch)

2 Ck X if the foundn is not req to att Sch B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5a Gross rents

b Net rental income or (loss)

6a Net gain/(loss) from sale of assets not on line 10

b Gross sales price for all assets on line 6a 289,951.

7 Capital gain net income (from Part IV, line 2)

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/(loss) (att sch)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule) SEE ST 1

b Accounting fees (attach sch) SEE ST 2

c Other prof fees (attach sch) SEE ST 3

17 Interest

18 Taxes (attach schedule)(see instr) SEE STM 4

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

SEE STATEMENT 5

24 Total operating and administrative expenses. Add lines 13 through 23

25 Contributions, gifts, grants paid PART XV

26 Total expenses and disbursements. Add lines 24 and 25

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter 0)

c Adjusted net income (if negative, enter 0)

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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			
	2	Savings and temporary cash investments	47,941.	63,261.	63,087.
	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 the instructions)			
	7	Other notes and loans receivable (attach sch.)			
		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)	39,973.		
	b	Investments — corporate stock (attach schedule)	384,460.	323,939.	599,930.
	c	Investments — corporate bonds (attach schedule)	150,000.		
	LIABILITIES	11	Investments — land, buildings, and equipment basis		
		Less: accumulated depreciation (attach schedule)			
12		Investments — mortgage loans			
13		Investments — other (attach schedule)	424,310.	642,852.	718,101.
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 instructions. Also, see page 1, item I)	1,046,684.	1,030,052.	1,381,118.
17		Accounts payable and accrued expenses			
18		Grants payable			
NET ASSETS OR FUND BALANCES	19	Deferred revenue			
	20	Loans from officers, directors, trustees, & 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.	
		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	1,046,684.	1,030,052.		
28	Paid-in or capital surplus, or land, building, and equipment fund				
29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances (see the instructions)	1,046,684.	1,030,052.		
31	Total liabilities and net assets/fund balances (see the instructions)	1,046,684.	1,030,052.		

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	1,046,684.
2	Enter amount from Part I, line 27a	2	-16,632.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	1,030,052.
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	1,030,052.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a SEE STATEMENT 6				
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			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2	33,427.
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 the instructions) If (loss), enter -0- in Part I, line 8		3	0.

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 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 (column (b) divided by column (c))
2009	91,791.	1,213,797.	0.075623
2008	101,158.	1,644,274.	0.061521
2007	88,392.	1,883,950.	0.046918
2006	85,682.	1,726,858.	0.049617
2005	80,153.	1,659,020.	0.048313

2 Total of line 1, column (d)	2	0.281992
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	0.056398
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	1,289,385.
5 Multiply line 4 by line 3	5	72,719.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	642.
7 Add lines 5 and 6	7	73,361.
8 Enter qualifying distributions from Part XII, line 4	8	80,408.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 — see 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 instr.)		1	642.
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, column (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	642.
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	642.
6 Credits/Payments.			
a 2010 estimated tax pmts and 2009 overpayment credited to 2010	6a	350.	
b Exempt foreign organizations — tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	350.	
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	292.	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2011 estimated tax Refunded	11		

Part VII-A Statements Regarding Activities

	Yes	No
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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>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</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) PA		
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? <i>If 'No,' attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

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Form 990-PF (2010)

Part VII-A Statements Regarding Activities (Continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>COZEN O'CONNOR</u> Telephone no <u>215-665-3733</u> Located at <u>1900 MARKET STREET</u> ZIP + 4 <u>19103</u>			
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 <u>N/A</u>	15		N/A
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 the instructions for exceptions and filing requirements for Form TD F 90-22.1 If 'Yes,' enter the name of the foreign country <u></u>	16	Yes	No
				X

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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here <u></u>	1b	N/A
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	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>	☐ Yes ☒ No	
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 the instructions)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__ , 20__ , 20__ , 20__</u>		
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	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b	X

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

5a During the year did the foundation pay or incur any amount to

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

5b N/A

Organizations relying on a current notice regarding disaster assistance check here

☐

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

N/A ☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b X

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

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 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
SYLVIA ABLOH NEW YORK, NY,	CHAIR 0	0.	0.	0.
SUZANNE ELKINS-ROSE CHICAGO, IL	TRUSTEE 0	0.	0.	0.
NELSON LURIA NEW YORK, NY,	TRUSTEE 0	0.	0.	0.
JUDITH BIEL LIPSETT SAN FRANCISCO, CA,	TRUSTEE 0	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1— see 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 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 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

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

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Form 990-PF (2010)

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes	1a	1,249,196.
a Average monthly fair market value of securities	1b	59,824.
b Average of monthly cash balances	1c	
c Fair market value of all other assets (see instructions)	1d	1,309,020.
d Total (add lines 1a, b, and c)		
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	1,309,020.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	19,635.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,289,385.
6 Minimum investment return. Enter 5% of line 5	6	64,469.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1 Minimum investment return from Part X, line 6	1	64,469.
2a Tax on investment income for 2010 from Part VI, line 5	2a	642.
b Income tax for 2010 (This does not include the tax from Part VI)	2b	
c Add lines 2a and 2b	2c	642.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	63,827.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	63,827.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	63,827.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	1a	80,408.
a Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1b	
b Program-related investments — total from Part IX-B	2	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes		
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	80,408.
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 instructions)	5	642.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	79,766.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				63,827.
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				
c From 2007				
d From 2008		7,220.		
e From 2009		31,789.		
f Total of lines 3a through e	39,009.			
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 80,408.				
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2010 distributable amount				63,827.
e Remaining amount distributed out of corpus	16,581.			
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	55,590.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount — see 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 instructions)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	55,590.			
10 Analysis of line 9				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008		7,220.		
d Excess from 2009		31,789.		
e Excess from 2010		16,581.		

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year SEE STATEMENT 7				
Total			▶ 3a	76,500.
b Approved for future payment				
Total			▶ 3b	

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 the instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue					
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	205.	
4	Dividends and interest from securities			14	34,445.	
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				.	33,427.
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)				34,650.	33,427.
13	Total. Add line 12, columns (b), (d), and (e)				13	68,077.

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

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	1 a (1)	X
(2) Other assets	1 a (2)	X
b Other transactions		
(1) Sales of assets to a noncharitable exempt organization	1 b (1)	X
(2) Purchases of assets from a noncharitable exempt organization	1 b (2)	X
(3) Rental of facilities, equipment, or other assets	1 b (3)	X
(4) Reimbursement arrangements	1 b (4)	X
(5) Loans or loan guarantees	1 b (5)	X
(6) Performance of services or membership or fundraising solicitations	1 b (6)	X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1 c	X

d If the answer to any of the above is 'Yes,' complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

[illegible]

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

☐ Yes ☒ No

b If 'Yes,' complete the following schedule

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

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

**Sign
Here**

Nelson J. Lewis
Signature of officer or trustee

11.2 May 2011
Date

Trustee
Title

**Paid
Preparer
Use Only**

Print/Type preparer's name

ALVIN M. GLASSER

Preparer's signature

ALVIN M. GLASSER

Date	
------	--

5/10/11

Check if ☐ if self employed

PTIN	
------	--

N/A

Firm's name

GLASSER & HAIMS, CPA, PC

Firm's EIN ▶ N/A

[illegible]

99 WEST HAWTHORNE AVENUE

VALLEY STREAM, NY 11580

Phone no

(516) 568-2700

BAA

Form 990-PF (2010)

2010

FEDERAL STATEMENTS

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CLIENT 6255232

A. L. LURIA & JENNIE L. LURIA FOUNDATION

23-6255232

5/09/11

01 34PM

STATEMENT 1
FORM 990-PF, PART I, LINE 16A
LEGAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COZEN O'CONNOR	\$ 1,347.	\$ 673.		\$ 674.
TOTAL	<u>\$ 1,347.</u>	<u>\$ 673.</u>		<u>\$ 674.</u>

STATEMENT 2
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GLASSER & HAIMS, CPA. P.C.	\$ 1,750.	\$ 875.		\$ 875.
TOTAL	<u>\$ 1,750.</u>	<u>\$ 875.</u>		<u>\$ 875.</u>

STATEMENT 3
FORM 990-PF, PART I, LINE 16C
OTHER PROFESSIONAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
NORTHEAST INVESTMENT MGMT	\$ 4,568.	\$ 2,284.		\$ 2,284.
TOTAL	<u>\$ 4,568.</u>	<u>\$ 2,284.</u>		<u>\$ 2,284.</u>

STATEMENT 4
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
U.S. TREASURY	\$ 394.			
TOTAL	<u>\$ 394.</u>	<u>\$ 0.</u>		<u>\$ 0.</u>

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FEDERAL STATEMENTS

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STATEMENT 5
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EMA AND OTHER FEES	\$ 150.	\$ 75.		\$ 75.
TOTAL	<u>\$ 150.</u>	<u>\$ 75.</u>		<u>\$ 75.</u>

STATEMENT 6
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	40M U.S. TREASURY BILL	PURCHASED	9/11/2009	2/18/2010
2	50M CD BANCO POP PUERTO RICO	PURCHASED	8/18/2008	3/01/2010
3	100M CD BANCO POP PUERTO RICO	PURCHASED	6/24/2009	3/30/2010
4	380 SHS CENOVUS ENERGY INC.	PURCHASED	2/15/2005	3/08/2010
5	200 SHS CENOVUS ENERGY INC.	PURCHASED	2/15/2005	3/08/2010
6	177 SHS IRON MOUNTAIN INC.	PURCHASED	3/03/2006	3/08/2010
7	300 SHS IRON MOUNTAIN INC.	PURCHASED	3/18/2008	3/08/2010
8	100 SHS IRON MOUNTAIN INC.	PURCHASED	3/18/2008	3/08/2010
9	275 SHS GILEAD SCIENCES INC.	PURCHASED	6/17/2003	4/26/2010
10	65 SHS SPDR S&P MIDCAP 400 ETF	PURCHASED	6/26/2001	4/26/2010
11	225 SHS ROYAL DUTCH SHELL	PURCHASED	6/17/1991	4/26/2010
12	540 SHS CVS CAREMARK CORP	PURCHASED	8/24/2007	10/04/2010
13	250 SHS MEDCO HEALTH SOLUTIONS	PURCHASED	3/14/2005	10/04/2010

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	40,000.		40,000.	0.				\$ 0.
2	50,000.		50,000.	0.				0.
3	100,000.		100,000.	0.				0.
4	9,803.		5,788.	4,015.				4,015.
5	5,160.		3,046.	2,114.				2,114.
6	4,516.		5,016.	-500.				-500.
7	7,654.		7,598.	56.				56.
8	2,551.		2,532.	19.				19.
9	11,080.		3,858.	7,222.				7,222.
10	9,884.		6,016.	3,868.				3,868.
11	19,730.		6,481.	13,249.				13,249.
12	16,827.		20,177.	-3,350.				-3,350.
13	12,746.		6,012.	6,734.				6,734.
							TOTAL	<u>\$ 33,427.</u>

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FEDERAL STATEMENTS

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CLIENT 6255232

A. L. LURIA & JENNIE L. LURIA FOUNDATION

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STATEMENT 7
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
MANHATTAN SCHOOL OF MUSIC NEW YORK, NY	NONE	PUBLIC	VARIOUS	\$ 30,000.
CHAUTAUQUA INSTITUTION NEW YORK, NY	NONE	PUBLIC	CHARITABLE	4,000.
CARNEGIE HALL SOCIETY NEW YORK, NY	NONE	PUBLIC		25,000.
YALE UNIVERSITY NEW HAVEN, CT	NONE	PUBLIC		5,000.
FACE THE FUTURE CHICAGO, IL	NONE	PUBLIC		1,500.
NEW YORK ESTIVAL OF SONG NEW YORK, NY	NONE	PUBLIC		5,000.
DYSTONIA MEDICAL RESEARCH CHICAGO, IL	NONE	PUBLIC		1,500.
SAN FRANCISCO MUSEUM OF MODERN ART SAN FRANCISCO, CA	NONE	PUBLIC		1,500.
JEWISH VOCATIONAL SERVICES SAN FRANCISCO, CA	NONE	PUBLIC		500.
CHILDRENS MUSEUM OF MANHATTAN NEW YORK, NY	NONE	PUBLIC		500.
THE RYAN LICHT SANG BIPOLAR FDN CHICAGO, IL	NONE	PUBLIC		1,000.
ALZHEIMER'S ASSN. CHICAGO, IL	NONE	PUBLIC		1,000.

TOTAL \$ 76,500.

A.L. Luria Jennie L. Luria Foundation
2010

	<u>#/shares</u>	<u>COST</u>	<u>MARKET VALUE</u> <u>AS OF 12/31/2010</u>
CASH			
Cash		2,539.06	2,539.06
ML Bank Deposit Program	35,580.00	35,580.00	35,580.00
Preferred Deposit	25,142.00	<u>25,142.00</u>	<u>25,142.00</u>
TOTAL		\$63,261.06	\$63,261.06
CORPORATE STOCKS			
Apache Corporation	123.00	9,508.68	14,665.29
Apache Corporation	37.00	2,859.96	4,411.51
Apache Corporation	100.00	7,729.64	11,923.00
Apache Corporation	140.00	10,236.52	16,692.20
Apple Inc	65.00	3,924.75	20,966.40
Apple Inc	65.00	3,924.75	20,966.40
Bank of New York Mellon Corporation	840.00	7,813.76	25,368.00
Chevron Corporation	200.00	9,098.25	18,250.00
Chevron Corporation	200.00	8,758.25	18,250.00
Coming Inc	1,260.00	10,139.76	24,343.20
Eaton Vance Corporation NVT	810.00	9,648.80	24,486.30
Encana Corporation	380.00	6,146.36	11,065.60
Encana Corporation	200.00	3,235.44	5,824.00
General Electric	1,400.00	15,003.60	25,606.00
General Electric	850.00	10,113.63	15,546.50
Google Inc - Class A	50.00	15,384.09	29,698.50
Google Inc - Class A	5.00	2,215.89	2,969.85
IBM Corporation	100.00	8,515.31	14,676.00
IBM Corporation	40.00	3,406.19	5,870.40
Medco Health Solutions	250.00	6,012.45	15,317.50
Occidental Petroleum Corporation	300.00	19,568.57	29,430.00
Price T Rowe Group Inc	180.00	9,430.29	11,617.20
Price T Rowe Group Inc	100.00	5,238.06	6,454.00
Price T Rowe Group Inc	100.00	5,238.06	6,454.00
Price T Rowe Group Inc	22.00	1,089.13	1,419.88
Price T Rowe Group Inc	78.00	3,861.45	5,034.12
Price T Rowe Group Inc	100.00	4,950.57	6,454.00
Pepsico Inc	55.00	2,527.18	3,593.15
Pepsico Inc	265.00	10,007.85	17,312.45

A.L. Luria Jennie L. Luria Foundation
2010

	<u>#/shares</u>	<u>COST</u>	<u>MARKET VALUE</u> <u>AS OF 12/31/09</u>
Procter & Gamble Co	310.00	11,929.59	19,942.30
Royal Dutch Shell PLC	425.00	8,474.59	28,381.50
State Street Corporation	480.00	14,955.08	22,243.20
Schlumberger LTD	320.00	19,911.64	26,720.00
Stifel Financial Corporation	300.00	11,438.43	18,612.00
Stifel Financial Corporation	150.00	5,719.21	9,306.00
Stifel Financial Corporation	75.00	2,859.61	4,653.00
Teva Pharmaceuticals Inds	50.00	1,679.18	2,606.50
Teva Pharmaceuticals Inds	50.00	1,679.18	2,606.50
Teva Pharmaceuticals Inds	400.00	9,937.12	20,852.00
3M Corporation	340.00	19,768.02	29,342.00
TOTAL		\$323,938.89	\$599,930.45
MUTUAL FUNDS			
Ishares MSCI Eafe Index Fund	1,200.00	55,107.69	69,864.00
Ishares MSCI Emerging Markets Index Fund	1,730.00	44,926.58	82,420.66
Ishares Barclays Tips Bo Protected Secs Fur	910.00	94,383.94	97,843.20
Vanguard Small Cap	320.00	19,897.26	23,241.60
Ishares Ftse Hk China 25 Index Fd	530.00	20,022.14	22,837.70
SPDR Barclays Cap S/T Muni Bd	1,390.00	33,533.27	33,095.90
Ishares Barclays 1-3 Year Credit	315.00	33,053.40	32,848.20
Ishares Barclays MBS Bd Fd	310.00	33,277.84	32,729.80
Vanguard Intermediate Term Bond ETF	925.00	74,287.26	76,303.25
Vanguard Short Term Bond	925.00	74,273.34	74,425.50
SPDR S&P Midcap 400 ETF Trust	110.00	10,181.84	18,114.80
Pimco Total Return Fund - Class C	12,310.00	134,994.59	133,563.50
Pimco Total Return Fund - Class C	Frac	5.54	5.38
SPDR Gold Trust	150.00	14,907.16	20,808.00
TOTAL		\$642,851.85	\$718,101.49