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## Return of Private Foundation

OMB No 1545-0052

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 , 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>RICHARD H. HOLZER MEMORIAL FOUNDATION</b>		A Employer identification number <b>23-7014880</b>
Number and street (or P O box number if mail is not delivered to street address) <b>25 ROCKWOOD PLACE</b>	Room/suite <b>335</b>	B Telephone number <b>201-871-8810</b>
City or town, state, and ZIP code <b>ENGLEWOOD, NJ 07631</b>		C If exemption application is pending, check here <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ <b>6,465,411.</b>	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
(Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		18,916.	18,916.		STATEMENT 1
4 Dividends and interest from securities		105,772.	105,772.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		44,252.			
b Gross sales price for all assets on line 6a <b>651,187.</b>					
7 Capital gain net income (from Part IV, line 2)			44,252.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income		38,658.	38,658.		STATEMENT 3
12 Total. Add lines 1 through 11		207,598.	207,598.		
13 Compensation of officers, directors, trustees, etc		29,489.	0.		29,489.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		5,300.	2,650.		2,650.
c Other professional fees STMT 5		50,501.	50,501.		0.
17 Interest					
18 Taxes STMT 6		25.	13.		12.
19 Depreciation and depletion		74.	74.		
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 7		888.	15.		873.
24 Total operating and administrative expenses. Add lines 13 through 23		86,277.	53,253.		33,024.
25 Contributions, gifts, grants paid		630,650.			389,650.
26 Total expenses and disbursements. Add lines 24 and 25		716,927.	53,253.		422,674.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<509,329.>			
b Net investment income (if negative, enter -0-)			154,345.		
c Adjusted net income (if negative, enter -0-)				N/A	

10

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing			381,838.	368,744.	368,744.
	2 Savings and temporary cash investments					
	3 Accounts receivable ▶ 3,729.			40,287.	3,729.	3,729.
	Less: allowance for doubtful accounts ▶					
	4 Pledges receivable ▶					
	Less: allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons					
	7 Other notes and loans receivable ▶					
	Less: allowance for doubtful accounts ▶					
	8 Inventories for sale or use			15,490.	16,138.	16,138.
	9 Prepaid expenses and deferred charges			725,587.	667,341.	667,341.
	10a Investments - U.S. and state government obligations STMT 9			4,378,636.	4,309,066.	4,309,066.
	b Investments - corporate stock STMT 10					
	c Investments - corporate bonds					
Liabilities	11 Investments - land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
	12 Investments - mortgage loans					
	13 Investments - other STMT 11			395,943.	372,144.	372,144.
	14 Land, buildings, and equipment basis ▶ 1,279.					
	Less: accumulated depreciation STMT 12 ▶ 1,279.			74.	0.	0.
	15 Other assets (describe ▶ STATEMENT 13)			644,702.	601,856.	728,249.
	16 Total assets (to be completed by all filers)			6,582,557.	6,339,018.	6,465,411.
	17 Accounts payable and accrued expenses			20,983.	21,328.	
	18 Grants payable			285,000.	421,000.	
	19 Deferred revenue					
20 Loans from officers, directors, trustees, and other disqualified persons						
21 Mortgages and other notes payable						
22 Other liabilities (describe ▶)						
23 Total liabilities (add lines 17 through 22)			305,983.	442,328.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31					
	24 Unrestricted			6,276,574.	5,896,690.	
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.					
	27 Capital stock, trust principal, or current funds					
	28 Paid-in or capital surplus, or land, bldg., and equipment fund					
	29 Retained earnings, accumulated income, endowment, or other funds			6,276,574.	5,896,690.	
30 Total net assets or fund balances						
31 Total liabilities and net assets/fund balances			6,582,557.	6,339,018.		

## 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	6,276,574.
2 Enter amount from Part I, line 27a	2	<509,329.>
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	129,445.
4 Add lines 1, 2, and 3	4	5,896,690.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	5,896,690.

Form 990-PF (2010)

**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</b>			
<b>b</b> SEE ATTACHED STATEMENT			
<b>c</b>			
<b>d</b>			
<b>e</b>			

(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)
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b> 651,187.		606,935.	44,252.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			44,252.

<b>2</b> Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	44,252.
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

**1** Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	446,317.	5,999,984.	.074386
2008	346,036.	7,337,726.	.047158
2007	381,176.	7,727,921.	.049325
2006	343,999.	7,849,465.	.043825
2005	387,566.	7,462,124.	.051938

<b>2</b> Total of line 1, column (d)	2	.266632
<b>3</b> 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	.053326
<b>4</b> Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	275,603.
<b>5</b> Multiply line 4 by line 3	5	14,697.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	6	1,543.
<b>7</b> Add lines 5 and 6	7	16,240.
<b>8</b> Enter qualifying distributions from Part XII, line 4	8	422,674.

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

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	1,543.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	1,543.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	1,543.
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	6a	16,138.	
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	16,138.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	14,595.	
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax <input checked="" type="checkbox"/> 14,595. Refunded <input type="checkbox"/>	11	0.	

**Part VII-A Statements Regarding Activities**

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

N/A

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>FOUNDATION</u> Telephone no. ► <u>201-871-8810</u> Located at ► <u>25 ROCKWOOD PLACE, ENGLEWOOD, NJ</u> ZIP+4 ► <u>07631</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 ► 15 <u>N/A</u>			
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	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <u>N/A</u> ► <input type="checkbox"/>	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____ , _____ , _____		
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) <u>N/A</u>	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____ , _____ , _____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 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.) <u>N/A</u>	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	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

Form 990-PF (2010)

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

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?

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

☐ Yes ☒ No

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

N/A

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.

(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
VIVIAN HOLZER	PRES			
25 ROCKWOOD PLACE				
ENGLEWOOD, NJ 07631	15.00	0.	0.	0.
ROBERT HOLZER	VP-TREAS			
25 ROCKWOOD PLACE				
ENGLEWOOD, NJ 07631	5.00	0.	0.	0.
WALLY DIETL	SECRETARY			
25 ROCKWOOD PLACE				
ENGLEWOOD, NJ 07631	20.00	29,489.	0.	0.
EVA HOLZER	MANAGER			
25 ROCKWOOD PLACE				
ENGLEWOOD, NJ 07631	5.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

Form 990-PF (2010)

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
HOLZER & COMPANY, INC. 263 CENTER AVENUE, WESTWOOD, NJ 07675	INVESTMENT MANAGEMENT	50,501.

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	

**Part IX-B** Summary of Program-Related Investments

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

Amount

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

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:		
a	Average monthly fair market value of securities	1a	269,874.
b	Average of monthly cash balances	1b	9,926.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	279,800.
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	279,800.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	4,197.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	275,603.
6	Minimum investment return. Enter 5% of line 5	6	13,780.

**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	13,780.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	1,543.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,543.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	12,237.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	12,237.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	12,237.

**Part XII** Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	422,674.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	422,674.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	1,543.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	421,131.

**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.

Form 990-PF (2010)

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
<b>1</b> Distributable amount for 2010 from Part XI, line 7				12,237.
<b>2</b> Undistributed income, if any, as of the end of 2010				
<b>a</b> Enter amount for 2009 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2010:				
<b>a</b> From 2005	39,108.			
<b>b</b> From 2006				
<b>c</b> From 2007	1,581.			
<b>d</b> From 2008				
<b>e</b> From 2009	151,062.			
<b>f</b> Total of lines 3a through e	191,751.			
<b>4</b> Qualifying distributions for 2010 from Part XII, line 4: ► \$	422,674.			
<b>a</b> Applied to 2009, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2010 distributable amount				12,237.
<b>e</b> Remaining amount distributed out of corpus	410,437.			
<b>5</b> Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	602,188.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> 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.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2005 not applied on line 5 or line 7	39,108.			
<b>9</b> Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	563,080.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2006				
<b>b</b> Excess from 2007	1,581.			
<b>c</b> Excess from 2008				
<b>d</b> Excess from 2009	151,062.			
<b>e</b> Excess from 2010	410,437.			

N/A

- ☐ 4942(i)(3) or ☐ 4942(i)(5)

**Part XV** **Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

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

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

- NONE

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b> SEE SCHEDULE ATTACHED SEE SCHEDULE ATTACHED	NONE	PUBLIC	TO FURTHER THE MEMORY OF RICHARD H HOLZER	389,650.
<b>b Approved for future payment</b> SEE SCHEDULE ATTACHED SEE SCHEDULE ATTACHED	NONE	PUBLIC	TO FURTHER THE MEMORY OF RICHARD H HOLZER	241,000.
<b>Total</b>			<b>► 3a</b>	389,650.
			<b>► 3b</b>	241,000.





## RICHARD H. HOLZER MEMORIAL FOUNDATION

**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	(c) Date acquired	(d) Date sold
		P - Purchase D - Donation	(mo., day, yr.)	(mo., day, yr.)
1a	DKR RELATIVE VALUE FUND	P	12/01/78	03/31/10
b	ALLY BANK CD	P	04/07/10	07/09/10
c	US TSY NOTES	P	09/01/08	08/16/10
d	DFA INVT DIMEN	P	09/15/06	06/17/10
e	DFA INVT DIMEN	P	09/10/09	06/17/10
f	ISHARES S&P	P	04/10/01	03/22/10
g	VANGUARD GNMA	P	08/15/02	03/22/10
h				
i				
j				
k				
l				
m				
n				
o				

	(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	20,167.		9,362.	10,805.
b	100,000.		100,000.	0.
c	200,000.		213,719.	<13,719.>
d	129,193.		72,042.	57,151.
e	2,228.		2,163.	65.
f	138,930.		149,649.	<10,719.>
g	60,669.		60,000.	669.
h				
i				
j				
k				
l				
m				
n				
o				

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			10,805.
b			0.
c			<13,719.>
d			57,151.
e			65.
f			<10,719.>
g			669.
h			
i			
j			
k			
l			
m			
n			
o			

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	44,252.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	N/A

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	COMPUTER	03/30/05	DB	5.00	17	1,279.			1,279.	1,205.		74.
	* TOTAL 990-PF PG 1					1,279.		0.	1,279.	1,205.	0.	74.
	DEPR											



## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
AMERITRADE	84.
PASCACK BANK	2,265.
U S TREASURY	16,567.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	18,916.

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
AMERITRADE	105,772.	0.	105,772.
TOTAL TO FM 990-PF, PART I, LN 4	105,772.	0.	105,772.

## FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PARTNERSHIP INCOME-MAP2000	6,186.	6,186.	
PARTNERSHIP INCOME-MAP1999	12,644.	12,644.	
PARTNERSHIP INCOME-MAP2001	14,991.	14,991.	
PARTNERSHIP INCOME-MAP2003	4,837.	4,837.	
TOTAL TO FORM 990-PF, PART I, LINE 11	38,658.	38,658.	

## FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	5,300.	2,650.		2,650.
TO FORM 990-PF, PG 1, LN 16B	5,300.	2,650.		2,650.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	50,501.	50,501.		0.
TO FORM 990-PF, PG 1, LN 16C	50,501.	50,501.		0.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DELAWARE FRANCHISE TAX	25.	13.		12.
TO FORM 990-PF, PG 1, LN 18	25.	13.		12.

FORM 990-PF	OTHER EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES & SUBSCRIPTIONS	858.	0.		858.
NJ FILING FEE	30.	15.		15.
TO FORM 990-PF, PG 1, LN 23	888.	15.		873.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
UNREALIZED GAIN IN MARKET VALUES	128,583.
FEDERAL INCOME TAX	862.
TOTAL TO FORM 990-PF, PART III, LINE 3	129,445.

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FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	9
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
AMERITRADE-US TSY	X		667,341.	667,341.
TOTAL U.S. GOVERNMENT OBLIGATIONS			667,341.	667,341.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			667,341.	667,341.

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FORM 990-PF	CORPORATE STOCK	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AMERITRADE-FUNDS	4,309,066.	4,309,066.
TOTAL TO FORM 990-PF, PART II, LINE 10B	4,309,066.	4,309,066.

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FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
UNREALIZED GAIN ON INVEST	COST	372,144.	372,144.
TOTAL TO FORM 990-PF, PART II, LINE 13		372,144.	372,144.

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FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	12
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTER	1,279.	1,279.	0.
TOTAL TO FM 990-PF, PART II, LN 14	1,279.	1,279.	0.

FORM 990-PF

OTHER ASSETS

STATEMENT 13

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
PARTNERSHIP INVESTMENTS	644,702.	601,856.	728,249.
TO FORM 990-PF, PART II, LINE 15	644,702.	601,856.	728,249.

**RICHARD H. HOLZER MEMORIAL FOUNDATION****23-7014880****2010****Form 990-PF****Page 10 Part****XV Line 3a****Contributions Paid During the Year**

Cantors Assembly Fdn.c/o Jewish Theological Seminary,3080 Broadway, NY, NY 10027	2,000.00
Carlos Otis Stratton Mountain Clinic - Stratton Mountain, VT 05155	1,000.00
Carnegie Hall – 881 Seventh Avenue, New York, NY 10019	15,000.00
Children's Therapy Center – 29-01 Berkshire Road, Fairlawn, NJ 07410	1,000.00
Cornell University – 130 E Seneca St., Ste 400, Ithaca, NY 14850	5,000.00
Georgetown University – Alumni Fund – Box 571253, Washington, DC 20057	1,000.00
Jewish Fed. of Palm Beach County - 4601 Community Dr.,W. Palm Beach, FL 33417	5,000.00
Kaplen JCC on the Palisades – 411 E. Clinton Ave., Tenaflly, NJ 07670	1,000.00
Kaplen JCC on the Palisades – 411 E. Clinton Ave., Tenaflly, NJ 07670	1,000.00
Lake George Corp. – P.O. Box 896, Skowhegan, ME 04976	500.00
National Brain Tumor Fdn.- 22 Battery Street, Suite 612, San Francisco, CA 94111	1,000.00
New York City Ballet – 20 Lincoln Street, New York, NY 10133	1,000.00
PEF Israel Endowment Fund – 317 Madison Ave., Suite 607, New York, NY 10017	2,000.00
Spanish Repertory Theatre - 138 East 27 <sup>th</sup> Street, New York, NY 10016	1,000.00
Temple Emanu-El – 180 Piermont Road, Closter, NJ 07624	2,000.00
US Holocaust Museum – 100 Raoul Wallenberg Place SW, Washington, DC 20024	1,000.00
Adler Aphasia Center – 60 West Hunter Avenue, Maywood, NJ 07607	1,000.00
Art School at Old Church – 561 Piermont Road, Demarest, NJ 07627	1,000.00

**RICHARD H. HOLZER MEMORIAL FOUNDATION****23-7014880****2010**

Arts Horizons – 1 Grand Ave., Suite 7, Englewood, NJ 07631	1,000.00
Bergen PAC – 30 North Van Brunt Street, Englewood, NJ 07631	100.00
Bergen PAC – 30 North Van Brunt Street, Englewood, NJ 07631	1,000.00
Cleveland Orchestra – Severance Hall, 1101 Euclid Ave., Cleveland, OH 44106	2,500.00
Demarest Public Library – 90 Hardenburgh Ave., Demarest, NJ 07627	1,000.00
Englewood Hospital & Medical Ctr. Fdn. - 350 Engle Street, Englewood, NJ 07631	5,000.00
JCC Thurnauer School of Music – 411 E. Clinton Ave., Tenafly, NJ 07670	15,000.00
JCC Thurnauer School of Music – 411 E. Clinton Ave., Tenafly, NJ 07670	20,000.00
Jewish Theological Seminary - 3080 Broadway, New York, NY 10027	25,000.00
Livingston Symphony Orchestra – P.O. Box 253, Livingston, NJ 07039	100.00
Metropolitan Opera – Lincoln Center, New York, NY 10023	50,000.00
Paper Mill Playhouse – Brookside Drive, Millburn, NJ 07041	1,000.00
Philadelphia Orchestra – 260 South Broad Street, Philadelphia, PA 19102	5,500.00
Thirteen Associates – 450 West 33 <sup>rd</sup> Street, New York, NY 10001-2605	1,500.00
United Negro College Fund – 8260 Willow Oaks Corp. Drive, Fairfax, VA 22031-8044	1,000.00
Weston Playhouse Theatre – 703 Main Street, Weston, VT 05161	1,000.00
Adler Aphasia Center – 60 West Hunter Ave., Maywood, NJ 07607	200.00
American Ballet Theatre - 890 Broadway, New York, NY 10003	5,000.00
Big Apple Circus – 505 8 <sup>th</sup> Ave., New York, NY 10018	1,000.00

**RICHARD H. HOLZER MEMORIAL FOUNDATION****23-7014880****2010**

Columbia University – Mail Code 4524, 622 West 113 <sup>th</sup> Street, New York, NY 10025	3,000.00
Community Food Bank of New Jersey - 31 Evans Terminal Rd., Hillside, NJ 07205	1,500.00
Gilda's Club Northern New Jersey – 575 Main Street, Hackensack, NJ 07601	5,000.00
JCC Thurnauer School of Music - 411 E. Clinton Ave., Tenaflly, NJ 07670	20,000.00
Jewish Assn. for Developmental Disabilities – 190 Moore Street, Hackensack, NJ 07601	1,500.00
Jewish Museum, 1109 Fifth Avenue, New York, NY 10128	5,000.00
Kaplen JCC on the Palisades – 411 East Clinton Ave., Tenaflly, NJ 07670	1,000.00
NJ Symphony Orchestra – 2 Central Avenue, Newark, NJ 07102-3173	4,000.00
New York Presbyterian Hospital - 654 West 170 <sup>th</sup> Street, New York, NY 10032	2,000.00
Temple Emanu-El - 180 Piermont Road, Closter, NJ 07624	2,000.00
Arnold P. Gold Foundation – 619 Palisade Ave., Englewood Cliffs, NJ 07632	5,000.00
Association of Small Foundations – 33 Wild Berry Lane, Underhill, VT 05489-0117	1,000.00
Carnegie Hall Society, Inc. – 881 Seventh Ave., New York, NY 10019	250.00
Dwight Englewood School – 315 East Palisade Avenue, Englewood, NJ 07631	5,000.00
Englewood Hospital and Medical Ctr. Fdn. – 350 Engle Street, Englewood, NJ 07631	10,000.00
JCC Thurnauer School of Music – 411 E. Clinton Ave., Tenaflly, NJ 07670	10,000.00
Jewish Home Foundation – 10 Link Drive, Rockleigh, NJ 07647	15,000.00
Jewish Theological Seminary – 3080 Broadway, New York, NY 10027	1,000.00
Kaplen JCC on the Palisades, 411 E. Clinton Ave., Tenaflly, NJ 07670	40,000.00
Leo Baeck Institute – 15 West 16 <sup>th</sup> Street, New York, NY 10011	1,000.00

**RICHARD H. HOLZER MEMORIAL FOUNDATION****23-7014880****2010**

Lincoln Center for the Performing Arts, 70 Lincoln Center Plaza, New York, NY 10023	15,000.00
Medina General Hospital – 1000 East Washington Street, Medina, OH 44256	2,500.00
Metropolitan Museum of Art - 1000 Fifth Ave., New York, NY 10028	10,000.00
Museum of Jewish Heritage –36 Battery Place, New York, NY 10280	5,000.00
Museum of Modern Art - 11 West 53 <sup>rd</sup> Street, New York, NY 10019	2,500.00
NY Times Neediest Cases Fund - 230 West 41 <sup>st</sup> Street, New York, NY 10036-7207	1,000.00
Public Theater – 425 Lafayette Street, New York, NY 10003	5,000.00
Solomon Schechter Day School - 275 McKinley Ave., New Milford, NJ 07646	15,000.00
Southeast Senior Center for Independent Liv.,228 Grand Ave., Englewood, NJ 07631	1,000.00
University of Vermont – 411 Main Street, Burlington, VT 05401-3470	20,000.00

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**Total for 2010: \$389,650.00**



# Richard H. Holzer Memorial Foundation

## Pledges

	Payments made on Pledges <u>as of 1/1/2010</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>
Englewood Hospital and Medical Center Foundation Pledge made on 8/28/08: \$50,000 Payable 2008/09/10/11/12	20,000	10,000	10,000	10,000		
JCC Turnauer School of Music Pledge made on 6/18/09: \$100,000 Payable 2009/10/11/12/13	20,000	20,000	20,000	20,000	20,000	
Kaplen JCC on the Palisades Pledge made on 6/14/07: \$200,000 Payable 2007/08/09/10/11	120,000	40,000	40,000			
Lincoln Center Corporate Fund Pledge made on 7/1/10: \$45,000 Payable 2010/11/12		15,000	15,000	15,000		
Metropolitan Opera Pledge made on 4/22/10: \$200,000 Payable 2010: \$50,000; 2011: \$75,000 2012: \$75,000		50,000	75,000	75,000		
NJ Symphony Orchestra Pledge made on 5/13/10: \$20,000 Payable 2010/11/12/13/14		4,000	4,000	4,000	4,000	4,000
Solomon Schechter Day School of Bergen Cnty Pledge made on 12/16/10: \$60,000 Payable 2010/11/12/13		15,000	15,000	15,000	15,000	
	<i>TOTAL</i>	<i>241,000</i>	<i>109,000</i>	<i>109,000</i>	<i>19,000</i>	<i>4,000</i>
University of Vermont College of Agriculture and Life Sciences Pledge made on 5/22/08: \$100,000 Payable 2009/10/11/12/13	20,000	20,000	20,000	20,000	20,000	

*APPROVED  
IN  
2010*

As of 12/16/10

• If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

• If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

<b>Part II</b>		<b>Additional (Not Automatic) 3-Month Extension of Time.</b> Only file the original (no copies needed)	
Type or print  File by the extended due date for filing your return. See instructions	Name of exempt organization		Employer identification number
	RICHARD H. HOLZER MEMORIAL FOUNDATION		23-7014880
	Number, street, and room or suite no. If a P O box, see instructions		
	25 ROCKWOOD PLACE, NO. 335		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions		
	ENGLEWOOD, NJ 07631		

Enter the Return code for the return that this application is for (file a separate application for each return)

0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

### FOUNDATION

• The books are in the care of **25 ROCKWOOD PLACE - ENGLEWOOD, NJ 07631**

Telephone No **201-871-8810**

FAX No. ☐

• If the organization does not have an office or place of business in the United States, check this box ☐

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2011.**

5 For calendar year **2010**, or other tax year beginning ☐ , and ending ☐

6 If the tax year entered in line 5 is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension

**ALL INFORMATION FROM OUTSIDE INVESTMENTS HAS NOT BEEN RECEIVED**

<b>8a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>8a</b>	\$	<b>6,500.</b>
<b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	<b>8b</b>	\$	<b>16,138.</b>
<b>c Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	<b>8c</b>	\$	<b>0.</b>

### Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ☐

Title ☐

Date ☐

Form 8868 (Rev. 1-2011)