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Form 99	0-	PF
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Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

OMB No 1545-0052 **911**

epartm Itemal I	Revenue Service Note. The foundation may be	e able to use a copy of	this return to s	atisfy state re	eporting requirements	<u> </u>
	alendar year 2010, or tax year beginning			and endin		, 20
	eck*all that apply. Initial return	Initial return of	of a former p	ublic charit	y	Final return
	Amended return	Addres	ss change		Name change	_
lame	of foundation	- · · · · · · · · · · · · · · · · · · ·			A Employer identifi	cation number
THE	JJ KALM FOUNDATION				26-	3338477
lumbe	er and street (or P O box number if mail is not delivered	to street address)		Room/suite	B Telephone number	(see page 10 of the instructions
0/3	THE AYCO COMPANY - NTG					
P.O.	BOX 15014				(51	8) 640-5000
City or	town, state, and ZIP code				C If exemption applica	tion is
•					pending, check here D 1 Foreign organizat	► i
ALB <i>I</i>	ANY, NY 12212-5014				2 Foreign organiza	
Ch	eck type of organization: X Section 501(c	(3) exempt private f	oundation		85% test, check to computation	
	Section 4947(a)(1) nonexempt charitable trust	Other taxable pr		ion	,	
		inting method. X Ca			E If private foundation	1 status was terminated (1)(A), check here .
		her (specify)				in a 60-month termination
		column (d) must be on	cash basis.)		1)(1)(B), check here
	Analysis of Revenue and Expenses (The	(a) Payarya and	41.11		4341	(d) Disbursements
	total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in	(a) Revenue and expenses per	(b) Net inve incom		(c) Adjusted net income	for charitable purposes
	column (a) (see page 11 of the instructions))	books				(cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)	505,335.				
2	Check ► if the foundation is not required to attach Sch B					
3	Interest on savings and temporary cash investments	1,593.		1,593.		ATCH 1
4	Dividends and interest from securities	80,596.	3	8,232.		ATCH 2
5 a	Gross rents					
	Net rental income or (loss)					
_	Net gain or (loss) from sale of assets not on line 10	116.			F	re per property and property
6 a	Gross sales price for all assets on line 6a 108, 336.					VECEIVED
7	Capital gain net income (from Part IV, line 2).	·		116.		
8	Net short-term capital gain					MAY 1 0 2011
9	Income modifications				60	
10 a	Gross sales less returns and allowances					127137 K1 111
t	Less Cost of goods sold .					DGDEN, UT
0	Gross profit or (loss) (attach schedule)					
11	Other income (attach schedule)	4,923.		4,923.		ATCH 3
12	Total. Add lines 1 through 11	592,563.		4,864.		
13	Compensation of officers, directors, trustees, etc					
14	Other employee salaries and wages		_			
15	Pension plans, employee benefits					
15 16a	Legal fees (attach schedule)	0.055				
	Accounting fees (attach schedule) ATCH 4	2,255.		0.	0.	
4	, , , , , , , , , , , , , , , , , , ,					
17 18 19 20 21	Interest	1 540		670		
18	Taxes (attach schedule) (see page 14 of the instructions)	1,540.		679.		
19	Depreciation (attach schedule) and depletion					
20	Occupancy				·	
21	Travel, conferences, and meetings					
22	Printing and publications	0 000		0 077		
23	Other expenses (attach schedule) ATCH 6.	8,092.		8,077		
24	Total operating and administrative expenses.	11 007		0 756	^	
23	Add lines 13 through 23	11,887.		8,756.	0.	260.01
25	Contributions, gifts, grants paid	368,850.		0.750	^	368,85
26	Total expenses and disbursements Add lines 24 and 25	380,737.		8,756.	0.	368,85
27	Subtract line 26 from line 12	011 000				
	Excess of revenue over expenses and disbursements	211,826.		6 100		
	b Net investment income (If negative, enter -0-)		3	6,108.	· -	
1 .	Adjusted not income (if pagetive enter () \		I	1		1

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

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JSA ** ATCH 5

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Form **990-PF** (2010)

P	art II	Attached schedules and amounts in the Balance Sheets description column should be for end-of-year	Beginning of year	End of	year
_		amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - hon-interest-bearing	413,901.	82,396.	82,396.
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable		-	
	6	Receivables due from officers, directors, trustees, and other			
	_	disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule)	,	_	
	•	Less allowance for doubtful accounts			
	8				.
Assets		Inventories for sale or use	-		
SS	9	Prepaid expenses and deferred charges			 -
۷	10 a	Investments - U S and state government obligations (attach schedule).	2,528,708.	3,065,483.	3,484,992.
		Investments - corporate stock (attach schedule) ATCH .7	2,320,700.	3,003,403.	3,404,992.
	11	Investments - corporate bonds (attach schedule)			
		and equipment basis Less accumulated depreciation (attach schedule)			
	12	Investments - mortgage loans Investments - other (attach schedule) ATCH 8	44 005	40 102	40.500
	13 14		44,005.	49,103.	49,590.
	14				
		(attach schedule)			
	15	Other assets (describe ATCH 9)	722.	1,122.	1,122.
	16	Total assets (to be completed by all filers - see the			
		instructions Also, see page 1, item l)	2,987,336.	3,198,104.	3,618,100.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
S	19	Deferred_revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
abi	21	Mortgages and other notes payable (attach schedule)			
֓֞֞֜֞֞֜֞֞֜֞֞֜֞֜֞֜֞֜֞֜֞֞֜֞֜֞֜֞	22	Other liabilities (describe			
	23	Total liabilities (add lines 17 through 22)		0.	
_		Foundations that follow SFAS 117, check here			
'		and complete lines 24 through 26 and lines 30 and 31.			
es	24	Unrestricted			
nc	24				
ala	25	Temporarily restricted			
98	26	Permanently restricted			
ū	24 25 26	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ► X			
F			2,987,336.	3,198,104.	
s or		Capital stock, trust principal, or current funds	2,301,330.	3/130/104.	
set	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0.		
Ass	29	Retained earnings, accumulated income, endowment, or other funds			
Net Assets	30	Total net assets or fund balances (see page 17 of the	2 007 226	2 100 104	
Z		instructions)	2,987,336.	3,198,104.	
	31	Total liabilities and net assets/fund balances (see page 17	0 007 006	2 100 104	
		of the instructions)	2,987,336.	3,198,104.	
_		Analysis of Changes in Net Assets or Fund			
1		I net assets or fund balances at beginning of year - Part			
	end-	of-year figure reported on prior year's return)		<u>1</u>	2,987,336.
2	Ente	r amount from Part I, line 27a		2	211,826.
3	Othe	r increases not included in line 2 (itemize) ▶		3	
					3,199,162.
5	Deci	lines 1, 2, and 3 eases not included in line 2 (itemize) - ATTACH	MENT 10	5	1,058.
		net assets or fund balances at end of year (line 4 minus			3,198,104.
					Form 990-PF (2010)

Part IV

(a) List an	(b) How acquired P-Purchase	(c) Date acquired (mo , day, yr.)	(d) Date sold (mo., day, yr.)		
1a SEE PART IV SCHI	orick warehouse, or common stock, 200 EDULE	313. MEO 00)	D-Donation	(1110 ; 424); 31.7	
b			-	1	
C					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (lo (e) plus (f) mini	
<u>_a</u>					
b					
_e					
Complete only for assets	s showing gain in column (h) and owne	d by the foundation on 12/31/69		Gains (Col. (h) g	
(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	col	(k), but not less t Losses (from co	
<u>c</u>					
<u>d</u>					
_e					
2 Capital gain net income of	r (not canital loce)	gain, also enter in Part I, line 7			116
. 0	· · · · · · · · · · · · · · · · · · ·	(loss), enter -0- in Part I, line 7	2		116.
• • •	n or (loss) as defined in sections 12				
•	l, line 8, column (c) (see pages 13	· ·			
If (loss), enter -0- in Part I, Part V Qualification	une 8		3_		
	the section 4942 tax on the distrib	• •	ase perio	d?	Yes X No
	not qualify under section 4940(e)		oforo mol	una onu ontrios	
1 Enter the appropriate am	nount in each column for each year	[etore mak	ing any entries.	
Base period years	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets		Distribution ra	
Calendar year (or tax year beginning in) 2009	105,157.	3,068,896.		(col (b) divided by	0.034265
2008	0.	2,519,967.			0.000000
2007	T				
2006	· · ·		_		-
2005					
2 Total of line 1, column (d)		2		0.034265
	for the 5-year base period - divide	e the total on line 2 by 5, or by the			
	ndation has been in existence if less		3		0.017133
•					
4 Enter the net value of no	ncharitable-use assets for 2010 fro	om Part X, line 5	4	3,	046,475.
			_		50 105
5 Multiply line 4 by line 3			5		52,195.
6 Enter 1% of net investme	ent income (1% of Part I, line 27b)		6		361.
7 Add lines 5 and 6			7		52,556.
8 Enter qualifying distribution	ons from Part XII, line 4		8		368,850.
If line 8 is equal to or gi Part VI instructions on pa	reater than line 7, check the box i	in Part VI, line 1b, and complete	that part	using a 1% ta	x rate See the

Capital Gains and Losses for Tax on Investment Income

1a Exempt operating flooracous disactabet in section 4940(s)(2), close, here ▶ and enter NA/ on the 1 Date of uniting or ettermination that meet the section 4940(e) requirements in Part IV, check here ▶ ★ And enter 1% of Part, line 27b. c All other domestic flooractions enter 2% of time 27b. Exempt foreign organizations enter 4% of Part, line 12b. of (1) and enter 1% of Part, line 12b. of (1) and enter 1% of Part, line 27b. c All other domestic flooractions enter 2% of time 27b. Exempt foreign organizations enter 4% of Part, line 12b. of (1) and other 10c of Part, line 12b. of (1) and other 10c of Part, line 12b. of (1) and other 10c of Part, line 12b. of (1) and other 10c of Part, line 12b. of (1) and other 10c of Part, line 12b. of (1) and other 10c of Part, line 12b. of (1) and other 10c of Part, line 12b. of (1) and other 10c of Part, line 12b. of (1) and other 10c of Part, line 12b. of (1) and (1)	Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the	ne inst	tructio	ns)
Date of ruting or determination letter: Demestic foundations that meet the section 444(c) requirements in Part V, clondations 1 361. Part I, lim to 12, cot (b) Part I, lim to 12, cot (c) Tax based on investment income. Subtract lim to 14 cot (c) to 18, cot (c) 5 361. Tax based on investment income. Subtract lim to 16 cot (c) to 18, cot (c) 5 361. Tax based on investment income. Subtract lim to 16 cot (c) to 18, cot (c) 5 361. C rodist/Payments: 2 cot (c) 6 1, 692. E Exempt foreign organizations-tax withheld at source 6 0 0 0 0 0 0 0 0 0	1 a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1			
nere ►		Date of ruling or determination letter: (attach copy of ruling letter if necessary - see instructions)			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, Ine 12, col (b) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 2 3 Add lines 1 and 2 4 Subtrite A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4 5 Tax based on investment income. Subtract line 4 from line 3, if zero or less, enter -0- 6 Toroticla?Pymetris a 2010 estimated tax payments and 2009 overpayment credited to 2010. 8 1, 692. b Exempt toregin organizations-tax withheld at cource 6 b 0. c Tax paid with application for extension of time to file (Form 886b). 6 c 0. d Backup withholding erroneously withheld 7 Total credits and payments Add lines 6 and 8 netter the amount ower 4 9 1, 692. 8 Enter any penalty for underspayment of estimated atax Check here 1 if Form 2220 is attached 8 9 Tax dus. If this total of lines 5 and 8 is more than line 7, enter amount ower 4 9 1, 331. 10 Exter the amount of line 10 to be Credited to 2011 estimated tax b 1, 331. Refunded 11 11 Enter the amount of line 10 to be Credited to 2011 estimated tax b 1, 331. Refunded 11 12 During the tax year, did the toundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 12 During the tax year, did the toundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 15 Durin type and more than \$100 during the year (either directly) or indirectly) for political purposes (see page 19 of the instructions for definition?? 15 Durin type and more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition?? 16 Durin type and more than \$100 during the year (either directly) or indirectly) for political purposes (see page 19 of the instructions for definition? 18 During the tax year, did the foundat	b			3	61.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, Ine 12, col (b) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 2 3 Add lines 1 and 2 4 Subtrite A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4 5 Tax based on investment income. Subtract line 4 from line 3, if zero or less, enter -0- 6 Toroticla?Pymetris a 2010 estimated tax payments and 2009 overpayment credited to 2010. 8 1, 692. b Exempt toregin organizations-tax withheld at cource 6 b 0. c Tax paid with application for extension of time to file (Form 886b). 6 c 0. d Backup withholding erroneously withheld 7 Total credits and payments Add lines 6 and 8 netter the amount ower 4 9 1, 692. 8 Enter any penalty for underspayment of estimated atax Check here 1 if Form 2220 is attached 8 9 Tax dus. If this total of lines 5 and 8 is more than line 7, enter amount ower 4 9 1, 331. 10 Exter the amount of line 10 to be Credited to 2011 estimated tax b 1, 331. Refunded 11 11 Enter the amount of line 10 to be Credited to 2011 estimated tax b 1, 331. Refunded 11 12 During the tax year, did the toundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 12 During the tax year, did the toundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 15 Durin type and more than \$100 during the year (either directly) or indirectly) for political purposes (see page 19 of the instructions for definition?? 15 Durin type and more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition?? 16 Durin type and more than \$100 during the year (either directly) or indirectly) for political purposes (see page 19 of the instructions for definition? 18 During the tax year, did the foundat		here ► X and enter 1% of Part I, line 27b			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter-0	c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of			
3 361. 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0		Part I, line 12, col (b)			
Subhile A (income) lax (domestic section 4947(a)(1) trusts and taxable toundations only. Others enter-0-)	2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) 2			
Tax based on investment income. Subtract line 4 from line 3.1 if zero or less, enter 0	3	7.00			
a 2010 estimated tax payments and 2009 overpayment credited to 2010. 6	4				
a 2010 estimated tax payments and 2009 overpayment credited to 2010. b Exempt foreign organizations-tax withhelid at source c Tax paid with application for extension of time to file (Form 8868). d Backup withholding erroneously withheld Total credits and payments. Add lines 6s although 6d. Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached. 8 Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached. 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed. 9 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. 12 Tax VIVIA S tatements Regarding Activities 13 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? 12 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? 13 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? 14 During the tax year, did the foundation of the activities and copies of any materials published or distributed by the foundation on connection with the activities and copies of any materials published or distributed by the foundation with the activities and copies of any materials published or distributed by the foundation during the year for political expenditure tax imposed on foundation managers ≥ \$ 2 Has the foundation managers ≥ \$ 2 Has the foundation managers ≥ \$ 2 Has the foundation managers ≥ \$ 3 Has the foundation managers ≥ \$ 3 Has the foundation managers ≥ \$ 4 Has the foundation managers ≥ \$ 4 Duth the foundation termination, dissolution, or substantial	5	The based on missing substant me in substant and substant			. 61.
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					
c Tax pard with application for extension of time to file (Form 8868). d Backup withholding erroneously withheld d d d d d d d d d d d d d d d d d d		2010 estimated tax payments and 2000 overpayment croated to 2010.			
6 Backup with application to extension to time to reform each year of Backup withholding erroneously withheld 1,692. 7 Total credits and payments Add lines 6a through 6d 7 Total credits and payments Add lines 6a through 6d 7 Total credits and payments Add lines 6a through 6d 7 Total credits and payments Add lines 6a through 6d 7 Total credits and payments Add lines 6a through 6d 7 Total credits and payments Add lines 6a through 6d 7 Total credits and payments Add lines 6a through 6d 7 Total credits and payments Add lines 6a through 6d 7 Total credits and payments Add lines 6a through 6d 7 Total credits and payments Add lines 6a through 6d 7 Total credits and payments Add lines 6a through 6d 7 Total credits 6d 8 Total credits 6d 8 Total credits 6d 9 Total credits 6d 9 Total credits 6d 7 Total credits 6d 9 Total credits 6d 1 Total credits 6d 9 Total credits 6d 1 Total credits 6d		Exempt foreign organizations-tax withheld at source			
7 Total credits and payments Add lines 6a through 6d		Tax paid with application for extension of time to life (Form 6666)			
8 Enter any penalty for underpayment of estimated tax. Check here				1.6	92.
Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount of line 10 to be Credited to 2011 estimated tax ▶ 1, 331. Refunded ▶ 11 Part VII-A Statements Regarding Activities 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? 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)? 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)? 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)? 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)? b Did the foundation file Form 1120-POL for this year? c Did the foundation like Form 1120-POL for this year? c Enter the amount (if-any) of-tax on political expenditures (section 4955) imposed during the year (1) on the loundation managers ▶ \$ c Enter the amount (if-any) of-tax on political expenditures (section 4955) imposed during the year for political expenditure tax imposed on foundation managers ▶ \$ c Enter the rembursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ c Has the foundation engaged in any activities that have not previously been reported to the IRS? If Yes, *atach a detailed description of the activities 1 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, *atach a				,	
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 ▶ 1	-	. 1			
Enter the amount of line 10 to be Credited to 2011 estimated tax ▶ 1, 331. Refunded ▶ 11 Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it				1,3	31.
Part VII-A Statements Regarding Activities 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? 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 In a 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, (fi-any) of tax on political expēnditures (section 4955) imposed during the year (1) On the foundation S (2) On foundation managers S Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers S 2 Has the foundation managers N S 2 X If "Yes," attach a detailed description of the activities 3 Has the foundation made any changes, not previously reported to the IRS; in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 3 X X X X X X X X X				<u> </u>	
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? 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 and copies of any materials published or distributed by the foundation and the activities of 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 S (2) On foundation managers S (3) On foundation managers S (4) On the foundation engaged in any activities that have not previously been reported to the IRS? 2 X If "Yes," attach a detailed description of the activities A is the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 3 X X X If "Yes," has it filled a tax return on Form 990-T for this year? 4b X X X X X X X X X	Par				
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 F≥			_ [Yes	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "*es" 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 expenditives (section 4955) imposed during the year (1) On the foundation \$\\$ (2) On foundation managers \$\\$ (3) On foundation during the year for political expenditure tax imposed on foundation managers \$\\$ (3) On foundation during the year for political expenditure tax imposed on foundation managers \$\\$ (4) On foundation during the year for political expenditure tax imposed on foundation managers \$\\$ (4) On foundation during the year for political expenditure tax imposed on foundation managers \$\\$ (4) On foundation during the year for political expenditure tax imposed on foundation managers \$\\$ (4) On foundation file foundation			1a		X
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 ►\$ 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? 2	b				
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27)? If "Yes," complete Part XIV					
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their			9		X
	10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their			
			10		X

Par	art VII-A Statements Regarding Activities (continued)				
11	1 At any time during the year, did the foundation, directly or indirectly, own a controlled entity	y within the			
	meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions) .		11		X
12	2 Did the foundation acquire a direct or indirect interest in any applicable insurance contract b	pefore			
	August 17, 2008?		12		X
13	3 Did the foundation comply with the public inspection requirements for its annual returns an	id exemption application?	13	X	
	Website address N/A				
14	Website address 4 The books are in care of ▶ C/O THE AYCO COMPANY- NTG Located at ▶25 BRITISH AMERICAN BLVD., LATHAM, NY	elephone no. >518-646	0-50	00	-
	Located at ▶25 BRITISH AMERICAN BLVD., LATHAM, NY	ZIP+4 ▶ 12110			
15		neck here		▶	ـــا
	and enter the amount of tax-exempt interest received or accrued during the year				
16	6 At any time during calendar year 2010, did the foundation have an interest in o	or a signature or other authority		Yes	
	over a bank, securities, or other financial account in a foreign country?		16	<u> </u>	X
	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	Demind	1		L
Par	art VII-B Statements Regarding Activities for Which Form 4720 May Be		T	1	Г
	File Form 4720 if any item is checked in the "Yes" column, unless an exception	ı applies.	-	Yes	No
1 a	1a During the year did the foundation (either directly or indirectly).	Yes X No			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a	Yes X No			
	disqualified person?	·····			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	· · · · ·			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?				
	(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)?				
	(6) Agree to pay money or property to a government official? (Exception. Check "No				
	foundation agreed to make a grant to or to employ the official for a peri- termination of government service, if terminating within 90 days.)	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	ł		
	b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the excep				
	section-53 4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the	-	1b	İ	
	Organizations relying on a current notice regarding disaster assistance check here	_ 1			
С	c Did the foundation engage in a prior year in any of the acts described in 1a, or				
_	were not corrected before the first day of the tax year beginning in 2010?		1 c		X
2	2 Taxes on failure to distribute income (section 4942) (does not apply for years t				
	operating foundation defined in section 4942(j)(3) or 4942(j)(5))		į		
а	a At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and				
	6e, Part XIII) for tax year(s) beginning before 2010?	Yes X No			
	If "Yes," list the years				
b	b Are there any years listed in 2a for which the foundation is not applying the pro-	ovisions of section 4942(a)(2)			
	(relating to incorrect valuation of assets) to the year's undistributed income? (If a				v
	all years listed, answer "No" and attach statement - see page 22 of the instructions)		2b	 	X
С	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the	ne years here			
			1		
3 a	3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise				
	at any time during the year?			}	
b	b If "Yes," did it have excess business holdings in 2010 as a result of (1) any produced the formula of the Man 20, 1000 (2) the least of the Fuer result (or least the first th	· · · · · · · · · · · · · · · · · · ·			
	disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or lo				
	Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or				
	the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form		зь		
4 -	foundation had excess business holdings in 2010)			1	X
	b Did the foundation invest during the year any amount in a mariner that would jeopardize its to be Did the foundation make any investment in a prior year (but after December 31, 1			1	<u> </u>
	charitable purpose that had not been removed from jeopardy before the first day of the		4ь		Х
	The state of the s			00 DE	(0040)

Pa	t VII-B Statements Regarding Activities for	or Which Form 4	720 May Be Requ	ired (continued)		
5 a	During the year did the foundation pay or incur any amou	nt to				
	(1) Carry on propaganda, or otherwise attempt to influen		4945(e))?	Yes X No	,	
	(2) Influence the outcome of any specific public election	(see section 4955), o	r to carry on,			
	directly or indirectly, any voter registration drive?			Yes X No	,	
	(3) Provide a grant to an individual for travel, study, or ot				,	
	(4) Provide a grant to an organization other than a char			· — <u> </u>		
	section 509(a)(1), (2), or (3), or section 4940(d)(2)?			Yes X N	,	
	(5) Provide for any purpose other than religious, charita	_				
	purposes, or for the prevention of cruelty to children of			Yes X N	,	
b	If any answer is "Yes" to 5a(1)-(5), did any of the trans					
U	Regulations section 53.4945 or in a current notice regard				5b	X
	Organizations relying on a current notice regarding disas	•		· . —	55	
_	If the answer is "Yes" to question 5a(4), does the foundation					
C	•			Yes No		ł
	because it maintained expenditure responsibility for the g				'	
	If "Yes," attach the statement required by Regulations sec					
6 a	Did the foundation, during the year, receive any funds, o			Yes X N		
	on a personal benefit contract?			• — —		х
b	Did the foundation, during the year, pay premiums, direct	ctly or indirectly, on a p	personal benefit contrac	^{t7}	6b	^
	If "Yes" to 6b, file Form 8870			□ ☑		
	At any time during the tax year, was the foundation a pa		•	• — —		
	If "Yes," did the foundation receive any proceeds or have					
Pa	Information About Officers, Directors and Contractors	s, Trustees, Foun	dation Managers,	Highly Pald Empi	oyees,	
1	List all officers, directors, trustees, foundation m			page 22 of the instr	uctions).	
	(a) Name and address	(b) Title, and average hours per week	(c) Compensation (If not paid, enter	(d) Contributions to employee benefit plans	(e) Expens other all	
		devoted to position	-0-)	and deferred compensation	Other and	owances
			^			•
AT	TACHMENT 11		0.	0.		0
					,	
2	Compensation of five highest-paid employees (ot If none, enter "NONE."	her than those inc	luded on line 1 - se	e page 23 of the ins	tructions).	
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit	(e) Expens	
	· · · · · · · · · · · · · · · · · · ·	devoted to position		plans and deferred compensation	Other and	uwances
	NONE					
						
			<u> </u>			
		1				

Part VIII Information About Officers, Directors, Trustees, Foundation and Contractors (continued)	Managers, Highly Paid Emplo	yees,
3 Five highest-paid independent contractors for professional services (see	page 23 of the instructions). If no	one, enter "NONE."
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
N/A		
	NONE	٠
	-	· •
	-	
	-	
Total number of others receiving over \$50,000 for professional services		NONE
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant stati organizations and other beneficiaries served, conferences convened, research papers produced, etc.	stical information such as the number of	Expenses
1 PLEASE NOTE, THE FOUNDATION IS NOT INVOLVED IN ANY	DIRECT	
CHARITABLE ACTIVITIES. ITS PRIMARY PURPOSE IS TO S	UPPORT,	
BY CONTRIBUTIONS, OTHER CHARITABLE ORGANIZATIONS E	XEMPT	
UNDER INTERNAL REVENUE CODE SECTION 501(C)(3).		
3		
4		
Part IX-B Summary of Program-Related Investments (see page 24 of t		
Describe the two largest program-related investments made by the foundation during the tax year on line	s 1 and 2	Amount
1 N/A		
2		
All other program-related investments See page 24 of the instructions		
3_ <u>N/A</u>		
Table Add Incode Abrough 2		

Form **990-PF** (2010)

26-3338477

Pa	art X Minimum Investment Return (All domestic foundations must complete this part. Foresee page 24 of the instructions.)	eign foundation	ons,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes:		
а	Average monthly fair market value of securities	1a	2,917,975.
b	Average of monthly cash balances	1b	132,171.
С	Fair market value of all other assets (see page 25 of the instructions)	1c	42,722.
d		1d	3,092,868.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)	_	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3		3	3,092,868.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of		
		4	46,393.
5	the instructions) Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	3,046,475.
6	Minimum investment return. Enter 5% of line 5	6	152,324.
Pa	art XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) prival foundations and certain foreign organizations check here ▶ and do not complete this		
1	Minimum investment return from Part X, line 6	1	152,324.
2a	Tax on investment income for 2010 from Part VI, line 5		
b		7	
С		2c	361.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	151,963.
4	Recoveries of amounts treated as qualifying distributions		
5		_	151,963.
6	Add lines 3 and 4 Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII,		
	line 1	7	151-,-963-
=	art XII - Qualifying Distributions (see page 25 of the instructions)	· · · · · · · · · · · · · · · · · · ·	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		262 252
а		1a	368,850.
b		1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,		•
	purposes	2	<u> </u>
3	Amounts set aside for specific charitable projects that satisfy the		_
а			0.
b	/		0.
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	368,850.
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)		361.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	368,489.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when call qualifies for the section 4940(e) reduction of tax in those years.	alculating who	ether the foundation

Form **990-PF** (2010)

Pa	rt XIII Undistributed Income (see page	26 of the instruction	ns)		
		(a)	(b)	(c)	(d)
1	Distributable amount for 2010 from Part XI,	Corpus	Years prior to 2009	2009	2010
	line 7				151,963.
2	Undistributed income, if any, as of the end of 2010				
а	Enter amount for 2009 only			47,672.	
ь	Total for prior years 20 08 ,20 07 ,20 06	·			
3	Excess distributions carryover, if any, to 2010.				
а	From 2005				
b	From 2006				
С	From 2007				
d	From 2008				
е	From 2009 0.				
	Total of lines 3a through e	0.			
4	Qualifying distributions for 2010 from Part XII,				
	line 4 ▶ \$ 368,850.				
а	Applied to 2009, but not more than line 2a			47,672.	
b	Applied to undistributed income of prior years (Election				
_	required - see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election				
·	required - see page 26 of the instructions)				
d	Applied to 2010 distributable amount				151,963.
	Remaining amount distributed out of corpus	169,215.			
5	Excess distributions carryover applied to 2010				
	(If an amount appears in column (d), the same				
6	amount must be shown in column (a)) Enter the net total of each column as				
	indicated below:				
a_	_CorpusAdd_lines-3f,-4c,-and-4e=Subtract-line 5	169,215.			
ь	Prior years' undistributed income Subtract				
	line 4b from line 2b				
С	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		<u> </u>		
d	Subtract line 6c from line 6b Taxable				
	amount - see page 27 of the instructions				
е	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				
7	to satisfy requirements imposed by section				
	170(b)(1)(F) or 4942(g)(3) (see page 27 of the				
8	instructions)				
0	applied on line 5 or line 7 (see page 27 of the				
	instructions)				
9	Excess distributions carryover to 2011.	169,215.			
	Subtract lines 7 and 8 from line 6a	109,213.			
	Analysis of line 9				
	Excess from 2006				
	Excess from 2007				
	Excess from 2008				
	Excess from 2009				
е	Excess from 2010 169, 215.		1	ŀ	

Pa	rt XIV Private Oper	rating Foundations	(see page 27 of the	instructions and Pa	rt VII-A, question 9)	NOT APPLICABLE			
1 a	If the foundation has	received a ruling or o	letermination letter tha	it it is a private opera	ating				
	foundation; and the ruling	g is effective for 2010, e	nter the date of the ruling		>				
b	Check box to indicate wh				- 1 1)(3) or 4942(j)(5)			
	•	Tax year Prior 3 years							
2 a	Enter the lesser of the ad- justed net income from Part	(a) 2010	(b) 2009	(c) 2008	(d) 2007	(e) Total			
	I or the minimum investment		(4)2000	(0)2000	(2)2001				
	return from Part X for each								
	year listed								
Ь	85% of line 2a								
C	Qualifying distributions from Part								
	XII, line 4 for each year listed .								
d	Amounts included in line 2c not				•				
	used directly for active conduct of exempt activities				İ				
е	Qualifying distributions made								
	directly for active conduct of								
	exempt activities Subtract line 2d from line 2c								
3	Complete 3a, b, or c for the								
	alternative test relied upon								
а	"Assets" alternative test - enter								
	(1) Value of all assets			 					
	(2) Value of assets qualifying under section								
_	4942(j)(3)(B)(i)								
ь	"Endowment" alternative test-								
	enter 2/3 of minimum invest- ment return shown in Part X,								
	line 6 for each year listed								
C	"Support" alternative test - enter								
	(1) Total support other than				i				
	gross investment income					İ			
	(interest, dividends, rents, payments on securities								
	loans (section 512(a)(5)),								
	or royalties)								
	public and 5 or more								
	exempt organizations as provided in section 4942]			
	(J)(3)(B)(III)					_			
	(3) Largest amount of sup- port from an exempt	İ]			
	organization					_			
_	(4) Gross investment income		<u></u>						
Pa					ation had \$5,000	or more in assets			
		during the year - se	<u></u>	structions.)					
1	Information Regardin	g Foundation Manage	rs:						
а	List any managers of	the foundation who h	nave contributed mor	e than 2% of the tota	I contributions receiv	ed by the foundation			
	before the close of any	y tax year (but only if the	ney have contributed i	more than \$5,000) (S	ee section 507(d)(2).)				
	JAMES, JR.	AND LISA MAGU	IRE						
<u> </u>	List any managers of			f the stock of a corpo	oration (or an equally	large portion of the			
	ownership of a partner					large portion of the			
	omionip or a parmo	, o							
	N/A								
2	Information Regardin	a Contribution Grant	Gift Loan Scholars	hin etc Programs:					
~		· .		•					
	Check here ► X if t	the foundation only	makes contributions	to preselected chari	table organizations a	nd does not accept			
	unsolicited requests forganizations under ot				26 of the instruction	ons) to individuals of			
				-					
а	The name, address, a	nd telephone number	of the person to who	m applications should b	e addressed:				
			<u> </u>						
b	The form in which app	lications should be su	bmitted and informati	on and materials they	should include:				
_						. <u>-</u>			
c	Any submission deadle	ines:							
-	•								
			•						
4	Any restrictions or li	mitations on awards	such as by geogra	anhical areas charita	ble fields kinds of	institutions, or other			
-	factors	andiono on amaido	, 222 ac by googi	apinous arodo, onanta					

Part XV Supplementary Information (continued)			
3 Grants and Contributions Paid Duri	ng the Year or Appr			
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
a Paid during the year				
10				
ATTACHMENT 12				
			1	
	•			
Total		<u> </u>		368,850.
b Approved for future payment				
2 Approved for relate payment		İ		
•				
Total	I		▶ 3b	
lotal				Ì

Enter gross amounts u	nless otherwise indicated		vities		· · · · · · · · · · · · · · · · · · ·	
1 Program service rev	moso dinormos maisaisa.	Unrela (a)	ated business income (b)	Excluded by	v section 512, 513, or 514 (d)	(e) Related or exempt function income
-	enue:	Business code	Amount	Exclusion code	Amount	(See page 28 of the instructions)
a						
c						
d						
e						
f						
	s from government agencies					
2 Membership dues a	and assessments	-		1 1 4	1 502	
	d temporary cash investments			14	1,593.	
	est from securities			14	80,596.	
	or (loss) from real estate.	_				
	roperty					
	ed property		-	 		
	(loss) from personal property .					
	ncome			18	116.	
	les of assets other than inventory	 		10	110.	
	s) from special events					
• •	s) from sales of inventory					
11 Other revenue: a _ b ATTACH	IMENT 13				4,923.	
					1,520	
_	<u> </u>		-	+		
e						
	nns (b), (d), and (e)				87,228.	
	columns (b), (d), and (e)					87,228.
	13 instructions on page 29				· · · · · · · · · · · · · · · · · · ·	
Part XVI-B Rel	ationship of Activities	to the Ac	complishment of E	xempt Purp	oses	
	below how each activitions below how each activition below to the foundation below the founda					
v instruct		on a exemp	or purposes (other tha	ii by providing	g rands for sacir parpose	
			-	-		
			41.150			
			A N			
			n A			
			N A			
			NA			
			NA			
			N A			
			N A			
			n A			
			NA			
			NA			
			A N			
			A Lu			
			N A			
			N/A			
			NA			
			N A			

Part XVII

	Exempt Orga	nizations								
ın sect	e organization directly tion 501(c) of the C	•			•				Yes	No
organiza a Transfe	ations? ers from the reporting f	oundation to a non-	sharitable evenut ere	ranization of						
	sh		, -					1a(1)		х
	er assets							1a(2)		Х
	ransactions							(-/		
	es of assets to a nonch	naritable exempt orga	anization					1b(1)		Х
	chases of assets from							1b(2)		X
	ntal of facilities, equipm							1b(3)		X
	mbursement arrangeme									X
(5) Loa	ans or loan guarantees							1b(5)		X
	formance of services of							1b(6)		X
	of facilities, equipmer							1c		X
	answer to any of		,	_						
	of the goods, other									
	n any transaction of	i e								
(a) Line no	(b) Amount involved N/A	(c) Name of non	ncharitable exempt orga	anization	N/A	ption of transiers,	transactions, and shar	ing anai	igeme	
					11, 11					
										
	_ 		<u> </u>	•	-					
									_	
							•			
	_ .									
describ	foundation directly led in section 501(c) of	the Code (other tha				•		Ye	s []	No
b If "Yes,	complete the following (a) Name of organization		(b) Type of o	ırnanızatınn		(c) D	escription of relations	hin		
	(a) Name of organization	<u>'</u>	(b) Type of o	ngamzanon		(0) 2	escription of relations	p		
				_						
										
								-		
	er penalties of perjury. d	eclare that I have example Declaration of	mined this return, inc preparer (other than tax	luding accomp xpayer or fiduo	panying sched gary) is based	ules and statemer on all information	its, and to the best of which preparer has	f my kn any kno	owledg	lge and e
	signature of office or truste	e //		Date		Title				
	Print/Type p/eparer's	name V	Preparer's signatu	ure		Date		PTIN		
Paid	1 71 11	linds.	01	1-1-	. <i>, </i>	cladasii	Checkıf			
Preparer	901111 11 74	alski	I yell A.	We	o ura	53/2011	self-employed			91
-		HE AYCO COMP	ANY LP			Fır	m's EIN ▶ 33-1	1874	32	
Use Only	Firm's address ▶ PC		277		100	10 [01.]	540 0	40 5	000	
	<u> </u>	ALBANY,	NY		122	12-5014 Pr	ione no 518-6		000	/aa

THE JJ KALM FOUNDATION

FORM 990-PF - PART IV

Kınd of F				ription		or O	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
			, s corpor	ON TRUST FU ATION, AND OR LOSS			-5.	
			, s corpor	N TRUST FUN ATION, AND OR LOSS			497.	
		TOTAL CAPIT	TAL GAIN DI	STRIBUTIONS			199.	
95,000.		CD STERLING PROPERTY TY 94,363.		1% DUE 3/4 TIES	/10	P	03/05/2009	03/04/201
99,000.		350 SHS ISH	IARES S&P E	UROPE 350		P		11/30/201
12,645.		PROPERTY TY 13,857.	PE: SECURI	TIES			-1,212.	
OTAL GAIN(L	oss)	· · · · · · · · · · · · · · · · · · ·		• • • • • • • • • • • • • • • • • • • •	<u></u>	-	116	
		-						
	-							

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2010

Name of the organization Employer identification number THE JJ KALM FOUNDATION 26-3338477 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 $\lceil \overline{X} \rceil$ 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 331/3% 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 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).

For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2010)

ame of organization	THE	JJ	KALM	FOUNDATION

Page of of Part I 26-3338477

Part I	Contributors (see instructions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1_	JAMES MACGUIRE, JR. C/O AYCO COMPANY - NTG, P.O. BOX 15014 ALBANY, NY 12212-5014	\$505,335.	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)

Schedule B	(Form 990.	990-F7	or 990-PF)	(2010)

of Part II Page of

Name of organization THE JJ KALM FOUNDATION

Employer identification number

	26-3338477
	•

	tolloadil i toporty (doe illoaddollo)		
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1_	500,000 PENN ST PUB SBA 3.75% DUE JUN 15 2011		,
		\$\$	11/30/2010
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		 _ _ \$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		-	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		_	
		 \$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		_	
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		_	-
		\$	
	<u> </u>		

JSA 0E1254 1 000

Schedule B (Form 990, 990-EZ, or 990-PF) (2010)

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SCHEDULE D (Form 1041)

Department of the Treasury

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T. See the Instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

OMB No 1545-0092

2010

Internal Revenue Service Name of estate or trust Employer identification number THE JJ KALM FOUNDATION 26-3338477 Note: Form 5227 filers need to complete only Parts I and II. Short-Term Capital Gains and Losses - Assets Held One Year or Less Part I (f) Gain or (loss) for (b) Date acquired (e) Cost or other basis (a) Description of property (Example 100 shares 7% preferred of "Z" Co) (c) Date sold the entire year Subtract (e) from (d) (d) Sales price (mo, day, yr) (mo, day, yr) (see instructions) 1a -575. **b** Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b 1b Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 2 -5. Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts 3 3 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2009 Capital Loss 4 Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, -580. column (3) on the back Long-Term Capital Gains and Losses - Assets Held More Than One Year (f) Gain or (loss) for (e) Cost or other basis (a) Description of property (b) Date acquired (c) Date sold the entire year Subtract (e) from (d) (d) Sales price (Example 100 shares 7% preferred of "Z" Co) (mo, day, yr) (mo, day, yr) (see instructions) 6a **b** Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b 6b Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 7 497. Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts 199. Capital gain distributions 9 Gain from Form 4797, Part I 10 10 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2009 Capital Loss 11 Net long-term gain or (loss). Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back.

JSA

Schedule D (Form 1041) 2010

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

SCHEDULE D-1 (Form 1041)

Department of the Treasury Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

▶ See instructions for Schedule D (Form 1041). ▶ Attach to Schedule D to list additional transactions for lines 1a and 6a. OMB No 1545-0092 2010

Name of estate or trust

THE JJ KALM FOUNDATION

Employer identification number

26-3338477 Short-Term Capital Gains and Losses - Assets Held One Year or Less Part I (d) Sales pnce (see page 4 of the (e) Cost or other basis (b) Date (c) Date sold (f) Gain or (loss) Subtract (e) from (d) (a) Description of property (Example 100 sh 7% preferred of "Z" Co) (see page 4 of the acquired (mo , day, yr) (mo, day, yr) instructions) instructions) 1a CD STERLING SB (WASH) 1% DUE 3/4/10 03/05/2009 03/04/2010 95,000. 94,363. 637. 350 SHS ISHARES S&P EUROPE 11/30/2010 13,857. -1,212. 350 **VARIOUS** 12,645.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

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1b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 1b

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Schedule D-1 (Form 1041) 2010

Schedule D (Form 1041) 2010				Page 2
Part III Summary of Parts I and II		(1) Beneficiaries'	(2) Estate's	(3) Total
Caution: Read the instructions before completing this	part.	(see instr)	or trust's	
13 Net short-term gain or (loss)	13			-580.
14 Net long-term gain or (loss):				506
a Total for year			-	696.
b Unrecaptured section 1250 gain (see line 18 of the wrksht.)				
c 28% rate gain				116
15 Total net gain or (loss). Combine lines 13 and 14a		L		116.
Note: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Foi to Part V, and do not complete Part IV If line 15, column (3), is a net loss, complete P	rm 990 Part IV :	I-T, Part I, line 4a) If line and the Capital Loss Ca i	es 14a and 15, column Tvover Worksheet. as r	(2), are net gains, go necessarv
Part IV Capital Loss Limitation	<u> </u>	and the supress seed of	-	
16 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, F	Part I I	ne 4c if a trust) the sr	naller of	
				١
a The loss on line 15, column (3) or b \$3,000 Note: If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, pag Carryover Worksheet on page 7 of the instructions to figure your capital loss carryove	ė i, lir	ne 22 (or Form 990-T, I	ne 34), is a loss, comp	plete the Capital Loss
		·		
Part V Tax Computation Using Maximum Capital Gains Rate				
Form 1041 filers. Complete this part only if both lines 14a and 15 in colu			nount is entered in f	Part I or Part II and
there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is mor Caution: Skip this part and complete the worksheet on page 8 of the instruc				
 Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or 	Clions	"		
Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.				
Form 990-T trusts. Complete this part only if both lines 14a and 15 are	e gair	ns, or qualified divide	ends are included i	n income in Part I
of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this pa	rt and	I complete the work	sheet on page 8 of	the instructions if
either line 14b, col. (2) or line 14c, col. (2) is more than zero.				
17 Enter taxable income from Form 1041, line 22 (or Form 990-T, line 3	34) .	17		
18 Enter the smaller of line 14a or 15 in column (2)				
but not less than zero				
19 Enter the estate's or trust's qualified dividends		1		
from Form 1041, line 2b(2) (or enter the qualified				
dividends_included_in_income in-Part-Fof-Form-990-T) 19				
20 Add lines 18 and 19				
21 If the estate or trust is filing Form 4952, enter the				
amount from line 4g; otherwise, enter -0 ▶ 21		 		
22 Subtract line 21 from line 20. If zero or less, enter -0	•	22		
Subtract line 22 from line 17. If zero or less, enter -0-		23		
Enter the smaller of the amount on line 17 or \$2,300		24		
25 Is the amount on line 23 equal to or more than the amount on line 24				
Yes. Skip lines 25 and 26; go to line 27 and check the "No" box		ا م		
No. Enter the amount from line 23			 	
Subtract line 25 from line 24		20		
Yes. Skip lines 27 thru 30; go to line 31 No. Enter the smaller of line 17 or lin	no 22	27		
1 Co. Skip lines 27 tilla 30, go to line 31	110 22			
Enter the amount from line 26 (If line 26 is blank, enter -0-)		28		
29 Subtract line 28 from line 27		. 29		
30 Multiply line 29 by 15% (15)			30	
31 Figure the tax on the amount on line 23 Use the 2010 Tax Rati			nd Trusts	
(see the Schedule Ginstructions in the instructions for Form 1041)				
	-			
32 Add lines 30 and 31				
33 Figure the tax on the amount on line 17. Use the 2010 Tax Rate	e Sch	edule for Estates ar	nd Trusts	-
(see the Schedule Ginstructions in the instructions for Form 1041).				 -
34 Tax on all taxable income. Enter the smaller of line 32 or line 33				
G line 13 (or Form 990-T line 36)			34	

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ON TEMPORARY CASH INVESTMENTS	
CASH	
TEMPORARY	
N O	
INTEREST	
ı	
PART I	
990PF,	
FORM	

NET INVESTMENT INCOME	591. 1,002.	1,593.
REVENUE AND EXPENSES PER BOOKS	591.	1,593.
		TOTAL
DESCRIPTION	MERRILL LYNCH #02200 MERRILL LYNCH #02086	

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

NET INVESTMENT INCOME	38,184.	38,232.
REVENUE AND EXPENSES PER BOOKS	38,184. 41,470. 894. 48.	80,596.
DESCRIPTION	MERRILL LYNCH #02200 DIVIDENDS MERRILL LYNCH #02200 TAX EXEMPT INTEREST MERRILL LYNCH #02200 TAX EXEMPT DIVIDEND INTEREST FROM K-1S	TOTAL

- OTHER INCOME PART I FORM 990PF,

DESCRIPTION SECTION 1256 INCOME FROM K-1S

TOTALS

4,923. REVENUE AND EXPENSES PER BOOKS

4,923. NET INVESTMENT INCOME

4,923.

4,923.

FEES	
ACCOUNTING	
ı	
Н	
PART	
990PF,	
FORM	

	2,255.	70	FEES	PREP	TAX	AYCO TAX
INC	PER BOOKS			LON	RIPT	DESCRIPTION
INVE	EXPENSES					
-	AND					
	REVENUE					

NET	ADJU
INVESTMENT	N N
INCOME	INC

2,255.

TOTALS

- TAXES PART I FORM 990PF,

EXPENSES PER BOOKS REVENUE AND

INVESTMENT

DESCRIPTION

679. 861.

679.

679.

FOREIGN TAXES PAID FEDERAL TAX PAYMENTS

1,540.

TOTALS

THE JJ KALM FOUNDATION

- OTHER EXPENSES PART FORM 990PF, REVENUE AND

PER BOOKS EXPENSES

365. 15.

VESTEL INCOME 7,712. INVESTMENT

TOTALS

ACCOUNT FEES
PORTFOLIO DEDUCTIONS FROM K-1S
PA STATE FILING FEE

DESCRIPTION

8,092.

8,077.

ATTACHMENT 6

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ATTACHMENT

9

THE JJ KALM FOUNDATION

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CORPORATE STOCK PART FORM 990PF,

DESCRIPTION

MERRILL LYNCH #02200 MERRILL LYNCH #02086

TOTALS

BOOK VALUE ENDING

ENDING FMV

3,484,992.

3,065,483.

3,065,483.

3,484,992.

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- OTHER INVESTMENTS PART II FORM 990PF,

DESCRIPTION

POWERSHARES DB COMM INDEX FUND

TOTALS

ATTACHMENT 8

26-3338477

BOOK VALUE ENDING

ENDING FMV

49,590.

49,103.

49,103.

49,590.

5/3/2011

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FORM 990PF, PART II - OTHER ASSETS

DESCRIPTION

DIVIDENDS RECEIVABLE

TOTALS

ATTACHMENT 9

ENDING BOOK VALUE

ENDING FMV

1,122.

1,122.

1,122.

1,122.

Q

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION

AMOUNT

EXCESS OF FMV OVER COST OF DONATED STOCK

1,058.

TOTAL

1,058.

	•	_		
ATTACHMENT 11	EXPENSE ACCT AND OTHER ALLOWANCES	Ö	ō	0.
ATTACE	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	.0	Ö	0
	COMPENSATION	.0	ò	0.
DFFICERS, DIRECTORS, AND TRUSTEES	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	OFFICER - AS NEEDED	OFFICER - AS NEEDED	GRAND TOTALS
FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES	NAME AND ADDRESS	JAMIE MAGUIRE, JR. C/O THE AYCO COMPANY - NTG P.O. BOX 15014 ALBANY, NY 12212-5014	LISA MAGUIRE C/O THE AYCO COMPANY - NTG P.O. BOX 15014 ALBANY, NY 12212-5014	

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FORM 990PE, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

26-3338477

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PURPOSE OF GRANT OR CONTRIBUTION

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

FOUNDATION STATUS OF RECIPIENT

RECIPIENT NAME AND ADDRESS

SEE ATTACHED SCHEDULE

501(C)(3) NONE

ATTACHMENT 12

FOR GENERAL CHARITABLE PURPOSES

368,850.

AMOUNT

TOTAL CONTRIBUTIONS PAID

368,850,

JJ KALM FOUNDATION YEAR ENDING 12/31/2010 CHARITABLE CONTRIBUTION LIST EIN: 26-3338477

Date	Check #	Description		Amount
01/13/10		GET REAL GET RAW, Philadelphia, PA	\$	100,000 00
01/28/10	120	New York Road Runners Foundation, New York, NY	\$	2,500 00
01/12/10	124	Cadence Cycling Foundation, Philadelphia, PA	\$	5,000 00
01/11/10	125	Germantown Friends Craft Show, Philadelphia, PA	\$	500 00
02/01/10	127	Bethel College, Mishawaka, IN	\$	10,000 00
02/03/10	129	Deliverance Evangelistic Church, Philadelphia, PA	\$	5,000.00
02/24/10	132	Rockhurst University, Kansas City, MO	\$	5,000 00
03/23/10	133	Cadence Cycling Foundation, Philadelphia, PA	\$	10,000.00
03/15/10	134	Ancillae-Assumpta Academy, Wyncote, PA	\$	10,000 00
04/13/10	135	Chestnut Hill Academy, Philadelphia, PA	\$	10,000 00
04/07/10	138	Masterworks Foundation, Loganville, GA	\$	10,000 00
04/08/10	139	Bermuda Institute of Ocean Sciences, New Hyde Park, NY	\$	10,000 00
04/30/10	140	Wheaton College, Norton, MA	\$	50,000 00
04/22/10	142	Breakthrough Collaborative of Greater Philadelphia, Philadelphia, PA	\$	5,000 00
04/30/10	143	Project Home, Philadelphia, PA	\$	10,000 00
04/20/10	144	POW Cycling Tour, Milwaukee, WI	\$	10,000.00
05/06/10	146	Ulman Cancer Fund for Young Adults, Columbia, MD	\$	5,000 00
05/14/10	147	SJU Kinney Center for Autism Education, Philadelphia, PA	\$	10,000.00
05/14/10	151	Challenged Athletes Foundation, San Diego, CA	\$	500.00
05/24/10	152	Germantown Friends School Annual Fund, Philadelphia, PA	\$ \$ \$	10,000 00
05/25/10	154	University of Notre Dame, Notre Dame, IN	\$	10,000.00
06/22/10	148	Ethembeni School, Inchanga, KwaZulu-Natal, South Africa		3,000 00
06/04/10	153	World Bicycle Relief, Chicago, IL	\$ \$	1,000.00
06/04/10	155	Community Enrichment Fitness Network, Philadelphia, PA	\$	2,500.00
06/25/10	157	Tiger Woods Charity Event Corp, Irvine, CA	\$	5,000 00
06/24/10	158	Red Cross South Eastern Pennsylvania Chapter, Philadelphia, PA	\$	15,000.00
07/13/10	156	Wheelchair and Ambulatory Sports, Kendall Park, NJ	\$_	1,000.00_
07/02/10	160	Wissahickon Valley Watershed Association, Ambler, PA	\$	1,000.00
07/08/10	161	Wyndmoor Hose Company, Volunteer Fire & Rescue, Wyndmoor, PA	\$	100.00
07/29/10	162	Challenged Athletes Foundation, San Diego, CA	\$	5,000.00
07/14/10	163	University of Notre Dame, Notre Dame, IN	\$	15,000.00
08/17/10	164	University of Notre Dame, Notre Dame, IN	\$	1,000 00
08/02/10	166	Breakthough of Greater Philadelphia, Philadelphia, PA	\$	5,000 00
08/23/10	167	Catholic Charities Archdiocese of Philadelphia, Philadelphia, PA	\$	2,000 00
09/15/10	168	Red Cross South Eastern Pennsylvania Chapter, Philadelphia, PA	\$	5,000 00
09/21/10	169	Our Mother of Consolation, Philadelphia, PA	\$	10,000 00
10/04/10	170	Children's Hospital of Philadelphia, Philadelphia, PA	\$	1,000 00
10/05/10	172	Academy in Manayunk, Philadelphia, PA	\$	1,000 00
10/08/10	173	The Phelps School, Malvern, PA	\$	500.00
10/21/10	175	Germantown Friends School Annual Fund, Philadelphia, PA	\$	500 00
10/26/10	177	Our Mother of Consolation, Philadelphia, PA	\$	150 00
10/29/10	178	Children's Crisis Treatment Center, Philadelphia, PA	\$	500 00
11/05/10	174	Fairmount Water Works Interpretive Center, Philadelphia, PA	\$	500 00
11/01/10	179	Friends of the Wisshickon, Philadelphia, PA	\$	500 00
11/10/10	181	New York Road Runners Foundation, New York, NY	\$	2,500 00
11/18/10	183	Compassion International, York, PA	\$	600 00
12/29/10	185	Elise Joseph Foundation, Philadelphia, PA	\$	1,000 00

TOTAL CHARITABLE CONTRIBUTIONS PAID \$368,850.00

All contributions were made to the general purpose fund of public charitable organizations that were classified under Section 501(c)(3) of the Internal Revenue Code, except \$3,000 to the Ethembeni School, South Africa, that is considered to have Expenditure Responsibility under Reg. Sec. 53-4945-5(d)

TOTALS

RELATED OR EXEMPT FUNCTION INCOME

AMOUNT

EXCLUSION

AMOUNT

BUSINESS

DESCRIPTION

4,923.

01

4,923.

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ATTACHMENT 13

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