Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning , 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
JEROME H. STONE FAMILY FOUNDATION
C/O JEROME H. STONE ALZHEIMER'S ASSOC.

A Employer identification number
36-6061300

Number and street (or P O box number if mail is not delivered to street address) Room/suite
225 N. MICHIGAN AVE, 17TH FLOOR

B Telephone number
(312)335-5808

City or town, state, and ZIP code
CHICAGO, IL 60601

C If exemption application is pending, check here ▶☐
D 1. Foreign organizations, check here ▶☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶☐

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

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶☐

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶$ 2,986,556.

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (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 ▶☐

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).)

	Line		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received	281,858.			
	2	Check ▶☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	24,039.	24,039.		
	4	Dividends and interest from securities	39,514.	39,514.		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	52,592.			STATEMENT 1
	b	Gross sales price for all assets on line 6a 394,686.				
	7	Capital gain net income (from Part IV, line 2)		99,092.		
	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				
	12	Total. Add lines 1 through 11	398,003.	162,645.	0.	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees STMT 2	234.	59.	0.	175.
	b	Accounting fees STMT 3	5,000.	1,250.	0.	3,750.
	c	Other professional fees				
	17	Interest				
	18	Taxes STMT 4	313.	313.	0.	0.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses STMT 5	8,872.	8,747.	0.	125.
	24	**Total operating and administrative expenses.** Add lines 13 through 23	14,419.	10,369.	0.	4,050.
	25	Contributions, gifts, grants paid	421,828.			421,828.
	26	**Total expenses and disbursements.** Add lines 24 and 25	436,247.	10,369.	0.	425,878.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	-38,244.			
	b	**Net investment income** (if negative, enter -0-)		152,276.		
	c	**Adjusted net income** (if negative, enter -0-)			0.	

RECEIVED
7 11
IRS-OSC
OGDEN, UT

SCANNED NOV 29 2011

023501 12-07-10 LHA For Paperwork Reduction Act Notice, see the instructions. Form 990-PF (2010)

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	310,238.	330,488.	330,488.
	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			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations STMT 7	413,517.	311,435.	320,951.
	b Investments - corporate stock STMT 8	1,601,384.	1,674,633.	2,287,522.
	c Investments - corporate bonds STMT 9	77,267.	48,753.	47,513.
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶ OTHER ASSETS)	24,479.	82.	82.
	16 **Total assets** (to be completed by all filers)	2,426,885.	2,365,391.	2,986,556.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [X] and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	554,402.	531,152.	
	29 Retained earnings, accumulated income, endowment, or other funds	1,872,483.	1,834,239.	
	30 **Total net assets or fund balances**	2,426,885.	2,365,391.	
	31 **Total liabilities and net assets/fund balances**	2,426,885.	2,365,391.	

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	2,426,885.
2 Enter amount from Part I, line 27a	2	-38,244.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,388,641.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 6	5	23,250.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,365,391.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	HARRIS - SEE ATTACHED STATEMENT	P	VARIOUS	VARIOUS
b	ACORN FUND - CAPITAL GAIN DISTRIBUTIONS	P	VARIOUS	VARIOUS
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	380,663.		295,594.	85,069.
b	14,023.			14,023.
c				
d				
e				

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				85,069.
b				14,023.
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	99,092.
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

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	360,859.	2,602,077.	.138681
2008	433,084.	3,161,528.	.136986
2007	347,120.	3,133,639.	.110772
2006	477,934.	2,971,774.	.160824
2005	366,316.	2,918,330.	.125522

2	**Total** of line 1, column (d)	2	.672785
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.134557
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	2,859,934.
5	Multiply line 4 by line 3	5	384,824.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,523.
7	Add lines 5 and 6	7	386,347.
8	Enter qualifying distributions from Part XII, line 4	8	425,878.

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 ▶ ☐ 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 ▶ [X] and enter 1% of Part I, line 27b			1	1,523.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).				
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			2	0.
3 Add lines 1 and 2			3	1,523.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	0.
5 **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	1,523.
6 Credits/Payments:				
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a	9,051.		
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	9,051.
8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	
9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	7,528.
11 Enter the amount of line 10 to be: **Credited to 2011 estimated tax** ▶	7,528.	**Refunded** ▶	11	0.

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	1b		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?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		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*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		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?	6	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.*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ IL			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	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*	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see 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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ JEROME H. STONE Telephone no ▶312-335-5808

Located at ▶225 N. MICHIGAN AVE, 17TH FLOOR, CHICAGO, IL ZIP+4 ▶60601

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 N/A

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

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

		Line	Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c		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? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.) N/A	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? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.)* N/A	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

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 | 5b | |

Organizations relying on a current notice regarding disaster assistance check here ▶☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | 6b | | X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A | 7b | |

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
JEROME H STONE 225 N. MICHIGAN AVENUE, 17TH FLOOR CHICAGO, IL 60601	PRESIDENT 1.00	0.	0.	0.
CYNTHIA RASKIN 225 N. MICHIGAN AVENUE, 17TH FLOOR CHICAGO, IL 60601	SECRETARY 1.00	0.	0.	0.
JAMES H STONE 225 N. MICHIGAN AVENUE, 17TH FLOOR CHICAGO, IL 60601	TREASURER 1.00	0.	0.	0.
ELLEN STONE BELIC 225 N. MICHIGAN AVENUE, 17TH FLOOR CHICAGO, IL 60601	VICE PRESIDENT 1.00	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

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
NONE		
Total number of others receiving over $50,000 for professional services ▶		0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	0.
2	
3	
4	

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	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

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	2,524,861.
b	Average of monthly cash balances	1b	378,543.
c	Fair market value of all other assets	1c	82.
d	**Total** (add lines 1a, b, and c)	1d	2,903,486.
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	2,903,486.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	43,552.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,859,934.
6	**Minimum investment return.** Enter 5% of line 5	6	142,997.

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	142,997.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	1,523.		
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	1,523.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	141,474.
4	Recoveries of amounts treated as qualifying distributions			4	0.
5	Add lines 3 and 4			5	141,474.
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	141,474.

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	425,878.
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	425,878.
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	1,523.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	424,355.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				141,474.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			0.	
b Total for prior years: ____, ____, ____		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005 370,322.				
b From 2006 481,128.				
c From 2007 347,120.				
d From 2008 436,037.				
e From 2009 361,452.				
f Total of lines 3a through e	1,996,059.			
4 Qualifying distributions for 2010 from Part XII, line 4: ▶ $ 425,878.				
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	425,878.			
d Applied to 2010 distributable amount				0.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a).)	141,474.			141,474.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,280,463.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	228,848.			
9 **Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a	2,051,615.			
10 Analysis of line 9.				
a Excess from 2006 481,128.				
b Excess from 2007 347,120.				
c Excess from 2008 436,037.				
d Excess from 2009 361,452.				
e Excess from 2010 425,878.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

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

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

	Tax year	Prior 3 years			
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

JEROME H STONE

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.

NONE

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

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

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

JEROME H STONE, 312-335-5808
225 N. MICHIGAN AVE, 17TH FLOOR, CHICAGO, IL 60601

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

N/A

c Any submission deadlines:

N/A

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

N/A

Part XV Supplementary Information (continued)

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

Recipient: Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHED	NONE	PUBLIC	CHARITABLE	421,828.
Total			▶ 3a	421,828.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	24,039.	
4 Dividends and interest from securities			14	39,514.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	52,592.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue.					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		116,145.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	116,145.

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

Part XVII **Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

Sign Here

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

▶ [signature] 10/14/11 ▶
Signature of officer or trustee — Date — Title

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
	AUDREY PFEIFFER	[signature]	11-17-11		
	Firm's name ▶ RSM MCGLADREY INC			Firm's EIN ▶	
	Firm's address ▶ ONE SOUTH WACKER DRIVE, SUITE 800 CHICAGO, IL 60606-3392			Phone no 312-634-3400	

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
JEROME H. STONE FAMILY FOUNDATION
C/O JEROME H. STONE ALZHEIMER'S ASSOC.

Employer identification number
36-6061300

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of $5,000 or more during the year ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization
JEROME H. STONE FAMILY FOUNDATION
C/O JEROME H. STONE ALZHEIMER'S ASSOC.

Employer identification number
36-6061300

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	CYNTHIA RASKIN 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	$ 113,850.	Person [X] Payroll [ ] Noncash [X] (Complete Part II if there is a noncash contribution)
4	CYNTHIA RASKIN 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	$ 40,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
2	JAMES STONE 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	$ 33,491.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
3	ELLEN STONE 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	$ 94,517.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)

Name of organization	Employer identification number
JEROME H. STONE FAMILY FOUNDATION C/O JEROME H. STONE ALZHEIMER'S ASSOC.	36-6061300

Part II Noncash Property (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	3,000 SHS OF DISCOVERY CLASS-C	$ 113,850.	10/05/10

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

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

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

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

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

Name of organization

JEROME H. STONE FAMILY FOUNDATION
C/O JEROME H. STONE ALZHEIMER'S ASSOC.

Employer identification number

36-6061300

Part III **Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than $1,000 for the year.** Complete columns **(a)** through **(e)** and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **$1,000 or less** for the year. (Enter this information once. See instructions) ▶ $

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
HARRIS - SEE ATTACHED STATEMENT	PURCHASED	VARIOUS	VARIOUS

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
380,663.	342,094.	0.	0.	38,569.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
ACORN FUND - CAPITAL GAIN DISTRIBUTIONS	PURCHASED	VARIOUS	VARIOUS

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
14,023.	0.	0.	0.	14,023.

CAPITAL GAINS DIVIDENDS FROM PART IV	0.
TOTAL TO FORM 990-PF, PART I, LINE 6A	52,592.

FORM 990-PF LEGAL FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL EXPENSE	234.	59.	0.	175.
TO FM 990-PF, PG 1, LN 16A	234.	59.	0.	175.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING EXPENSE	5,000.	1,250.	0.	3,750.
TO FORM 990-PF, PG 1, LN 16B	5,000.	1,250.	0.	3,750.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	313.	313.	0.	0.
TO FORM 990-PF, PG 1, LN 18	313.	313.	0.	0.

FORM 990-PF OTHER EXPENSES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS EXPENSES	4.	4.	0.	0.
INVESTMENT COUNSELING	8,743.	8,743.	0.	0.
BANK FEES	100.	0.	0.	100.
ANNUAL FILING FEE	25.	0.	0.	25.
TO FORM 990-PF, PG 1, LN 23	8,872.	8,747.	0.	125.

FORM 990-PF OTHER DECREASES IN NET ASSETS OR FUND BALANCES STATEMENT 6

DESCRIPTION	AMOUNT
DIFFERENCE BETWEEN FMV AND COST BASIS OF DONATED SECURITY	23,250.
TOTAL TO FORM 990-PF, PART III, LINE 5	23,250.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 7

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
FEDERAL FARM CREDIT BANK	X		51,388.	52,419.
FEDERAL HOME LOAN BANK FHL 4.87% 3/11/11	X		0.	0.
FEDERAL HOME LOAN BANK FHL 4.875% 11/18/11	X		52,042.	51,980.
FEDERAL HOME LOAN BANK FHLB 3.625% 7/1/11	X		0.	0.
FEDERAL HOME LOAN BANK FHLB 4.875% 11/27/13	X		52,362.	55,294.
FEDERAL HOME LOAN BANK FHLB 4.875% 12/13/13	X		53,207.	54,511.
FEDERAL HOME LOAN BANK FHLB 5.0% 3/9/12	X		51,804.	52,499.
FEDERAL HOME LOAN BANK FHLB 3.35% 6/26/14	X		50,632.	54,248.
TOTAL U.S. GOVERNMENT OBLIGATIONS			311,435.	320,951.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			311,435.	320,951.

FORM 990-PF CORPORATE STOCK STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ABBOTT LAB	32,799.	43,119.
AMERICAN FDS/INVEST CO OF AMERICAN	307,486.	314,619.
APACHE CORP	27,465.	59,615.
ARIEL APPRECIATION FUND	23,975.	28,790.
ARIEL FUND	49,215.	60,945.
AT&T	15,700.	4,113.
BOSTON SCIENTIFIC	17,582.	19,682.
BRISTOL MYERS SQUIBB	71,552.	82,088.
CENOVUS ENERGY	21,546.	29,916.
COMCAST CORP	26,279.	9,073.
CONAGRA FOODS	45,152.	47,418.
COVIDIEN LTD	42,455.	50,226.
DIAGEO PLC	49,556.	74,330.
ENCANA(US)	0.	0.
FIDELITY INVESTMENTS	81,462.	105,705.
GENZYME CORP	36,659.	49,840.
H&R BLOCK	50,972.	34,539.

HJ HEINZ	40,290.	59,352.
HOME DEPOT	39,760.	49,084.
INTEL CORP	46,815.	46,266.
JOHNSON & JOHNSON	47,174.	49,480.
JP MORGAN	43,732.	50,904.
KINETIC CONCEPTS	9,990.	16,752.
LIBERTY FUNDS / ACORN FUND Z	296,179.	520,131.
DISCOVERY COMM CL A	18,127.	48,064.
MCDONALDS	12,756.	38,380.
MEDTRONIC	0.	0.
NESTLE	20,656.	58,556.
OAKMARK FUND	70,502.	108,321.
PEPSICO INC	31,274.	32,665.
PETSMART	19,903.	39,820.
PLUM CREEK TIMBER	16,113.	26,627.
RENAISSANCERE HLDS	0.	0.
SARA LEE CORP	24,314.	35,020.
UNILEVER	29,161.	33,968.
VANGUARD VFSIF ST CORP	2,500.	2,569.
XTO ENERGY	5,532.	57,545.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,674,633.	2,287,522.

FORM 990-PF CORPORATE BONDS STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
OMNICARE INC	25,644.	25,128.
PAYLESS SHOES	23,109.	22,385.
XEROX	0.	0.
TOTAL TO FORM 990-PF, PART II, LINE 10C	48,753.	47,513.

Section 4942(h)(2) Election
As to the Treatment of Qualifying Distributions

Jerome H. Stone Family Foundation
C/O Jerome H. Stone Alzheimer's Assoc.
225 N. Michigan Ave, 17th Floor
Chicago, IL 60601
FEIN: 36-6061300
2010 Form 990PF

Pursuant to IRC Section 4942(h)(2) and Regulation 53.4942(a)-3(d)(2), the above referenced foundation hereby elects to treat current-year qualifying distributions in excess of the immediately preceding tax year's undistributed income as being made out of corpus.

(Signature)

JEROME H STONE
(Name)

PRESIDENT
(Title)

STATEMENT 9

JEROME H STONE FAMILY FOUNDATION
FEIN#36-6061300
2010 Form 990PF, Part XV, Supplementary Information, 3 Grants and Contributions Paid During the Year:

Date	Contribution to	Amount
03/03/2010	Millennium Park	10,000 00
03/03/2010	Circle Foundation Innovative School	1,000 00
05/03/2010	The Chicago Council on Global Affairs	1,000 00
05/21/2010	Cinema/Chicago	1,000.00
12/01/2010	Chicago Symphony Orchestra Tomoshefsky	1,250 00
12/01/2010	Alzheimer's assoc Evelyn T Stone Fund	8,000 00
12/01/2010	Jewish United Fund	20,000 00
12/27/2010	The Art Institute of Chicago	2,500 00
01/12/2010	Columbia College	2,000 00
02/01/2010	CAASE	1,000 00
02/01/2010	Impact, Inc.	500 00
02/01/2010	Millennium Park	10,000 00
02/01/2010	Grant Park Music Festival	1,450 00
03/23/2010	Changing World	250 00
03/23/2010	Lyric Opera House	3,500.00
03/23/2010	Marin/San Francisco Jewish Community Teen	500 00
03/23/2010	Hand in Hand	600 00
04/14/2010	Chicago Global Donors Network	1,000 00
04/29/2010	Bronzville Academic Center	1,000 00
04/29/2010	Hotel Rwanda Rusesabagina Foundation	500 00
04/29/2010	Columbia College	19,814 40
04/29/2010	Chicago Humanities Festival	2,500 00
05/11/2010	Chicago Council on Global Affairs	1,000 00
05/11/2010	Harlem Stage/Aaron Davis Hall Inc	2,500 00
05/21/2010	Chicago Symphony	5,000 00
06/30/2010	Brandies University	1,000 00
07/01/2010	Museum of Contemporary Art	5,000 00
07/07/2010	Creative Visions Foundation	14,000 00
07/21/2010	Art Institute of Chgo Dept of African &	5,000 00
07/21/2010	New Venture Fund	500 00
07/21/2010	Chicago Humanities Festival	5,000 00
07/29/2010	Partners In Health	500 00
07/29/2010	Chicago Foundation for Women	1,000 00
08/09/2010	The Seldoms	500 00
08/26/2010	Columbia College Chicago	3,650 00
09/08/2010	Lincoln Park Village	1,000 00
09/24/2010	Human Rights Watch Annual Voices for Just	9,000 00
09/24/2010	Women's Media Group Inc	2,000 00
12/01/2010	Chicago Symphony Orchestra Tomoshefsky	1,250 00
12/01/2010	Alzheimer's assoc Evelyn T Stone Fund	8,000 00
12/01/2010	Jewish United Fund	20,000 00
12/31/2010	US Action Education Fund	1,500 00
12/31/2010	In These Times	3,000 00
12/31/2010	The Art Institute of Chicago	2,500 00
12/31/2010	Women's Studies Research Center Bradeis U	5,000 00
12/31/2010	Millennium Park	10,000 00
12/01/2010	Chicago Symphony Orchestra Tomoshefsky	1,250 00
12/01/2010	Alzheimer's assoc Evelyn T Stone Fund	8,000 00
12/01/2010	Jewish United Fund	20,000 00

JEROME H STONE FAMILY FOUNDATION
FEIN#36-6061300
2010 Form 990PF, Part XV, Supplementary Information, 3 Grants and Contributions Paid During the Year

Date	Contribution to	Amount
01/05/2010	United Way of the Desert	150 00
01/19/2010	Ravina Annual Fund	3,000 00
02/01/2010	Doctors Without Borders	500 00
02/01/2010	YCCS/Circle Foundation Innovative School	5,000 00
02/02/2010	Tamarisk UJC	500 00
03/03/2010	Lyric Opera House	1,150 00
03/03/2010	World Jewish Congress	100 00
03/03/2010	Jewish Council for Youth Services	250 00
03/03/2010	American Society for Yad Vashem	100 00
03/03/2010	Chicago Symphony	1,250 00
03/03/2010	Queer Soup Theatre	200 00
03/09/2010	Alzheimer's Assoc	500 00
03/25/2010	Palm Springs Friends of Philharmonic	1,500 00
03/25/2010	San Francisco Jewish Community Teen Found	1,000 00
04/08/2010	NorthShore Congregation Israel	100 00
05/05/2010	The Paget Foundation	500 00
05/06/2010	Juvenile Diabetics Assoc.	100 00
05/10/2010	The International Fellowship of Christian	50 00
05/20/2010	Chicago Council on Global Affairs	1,000 00
05/21/2010	William J Clinton Foundation	75 00
06/04/2010	International Fellowship of Christians an	50 00
06/21/2010	Pilgrim Chamber Players	500 00
06/22/2010	Alzheimer's Disease International	2,500 00
06/30/2010	Bnai Briths	100 00
06/30/2010	Alzheimer's Assoc	500 00
06/30/2010	Chicago Symphony	250 00
06/30/2010	Museum of Contemporary Art	25,000.00
06/30/2010	Museum of Contemporary Art	30,000.00
06/30/2010	League of Women Voters of United States	50.00
07/08/2010	Mount Holyoke College Art Museum for Joan	500.00
07/21/2010	NorthShore Congregation Israel	2,465 00
07/21/2010	United States Holocaust Memorial Museum	1,500 00
07/29/2010	Simon Wiesenthal Center	100 00
07/29/2010	Mercy Home for Boys & Girls	35 00
07/29/2010	WFMT Fine Arts Circle	25 00
07/29/2010	MADD	35 00
08/02/2010	NorthShore Congregation Israel	100 00
08/02/2010	National Parkinson Foundation	100 00
08/09/2010	Oxfam America	50 00
08/09/2010	Americans United for Separation of Church	70 00
08/13/2010	American Jewish Committee	200 00
08/13/2010	ADL	200 00
08/31/2010	Alzheimer's ADI	1,000 00
08/31/2010	National Strategy Forum	500.00
08/31/2010	JVS	250 00
09/08/2010	Southern Poverty Law Center	50.00
09/08/2010	League of Women Voters of United States	50 00
09/15/2010	CCCA	250.00
10/07/2010	Chicago Symphony	250 00

JEROME H STONE FAMILY FOUNDATION
FEIN#36-6061300
2010 Form 990PF, Part XV, Supplementary Information, 3 Grants and Contributions Paid During the Year.

Date	Contribution to	Amount
10/25/2010	AARP	25.00
10/29/2010	William J. Clinton Foundation	50.00
10/29/2010	NorthShore Congregation Israel	250.00
10/29/2010	Chicago Theological Seminary	1,000 00
11/19/2010	NAACP	25.00
11/19/2010	Palm Springs Art Museum	2,000.00
12/01/2010	Alzheimer's assoc Evelyn T Stone Fund	8,000.00
12/01/2010	Catholic Theological Union	5,000 00
12/01/2010	Chicago Symphony Orchestra Tomoshefsky	1,250 00
12/01/2010	Eisenhower Medical Center	1,000.00
12/01/2010	Millennium Park	27,142 86
12/01/2010	Roosevelt University	5,000 00
12/01/2010	WTTW 11	1,666 00
12/01/2010	Tolerance Education Center	5,000 00
12/01/2010	Jewish United Fund	15,000 00
12/01/2010	Jewish United Fund	35,000 00
12/01/2010	Roosevelt University	1,000 00
12/02/2010	Smart Museum of Art	250 00
12/03/2010	Barbara Sinatra Children's Center	1,000 00
12/17/2010	Impact, Inc	500 00
12/27/2010	Shoe4Africa	1,000 00
12/27/2010	Chicago Sinai Congregation	100 00
12/27/2010	The Hillels of Illinois	50 00
12/27/2010	CJE Senior life	50 00
12/27/2010	DePaul University College of Law	250 00
Total		421,828

All of the above contributions are for the general charitable, religious, scientific, literary, or educational activities of each donee

All recipients are public charities as described in Sec 509(a)(1), (2) or (3).

HARRIS ASSOCIATES L.P.
REALIZED GAINS AND LOSSES
STONE, JEROME H. FAMILY FDTN
PF 1766-180902 RSB/TLA DSFIXB
From 01-01-10 Through 12-31-10

Open Date	Close Date	Quantity	Security	Cost Basis	Amort. or Accretion	Proceeds	Gain Or Loss Short Term	Gain Or Loss Long Term
01-11-07	01-27-10	3,000 00	Payless Shoesrce CC@101 3/8 8.250% Due 08-01-13	3,151 20		3,082 50		-68 70
05-07-08	02-24-10	700 00	ConAgra Foods	16,142 78		17,049 83		907.05
03-18-04	02-24-10	50 00	Discovery Comm Cl A	652 76		1,595 46		942 70
12-05-03	02-24-10	40 00	Discovery Comm Cl A	496 85		1,276 37		779 52
11-10-03	02-24-10	120 00	Discovery Comm Cl A	1,455.34		3,829 11		2,373 77
08-06-04	02-24-10	100 00	Discovery Comm Cl A	1,211 52		3,190.92		1,979.40
11-06-08	03-05-10	500 00	Kinetic Concepts	12,487 33		21,290.17		8,802 84
11-06-08	03-15-10	600.00	Kinetic Concepts	14,984 80		29,683 68		14,698 88
06-20-03	06-15-10	25,000 00	Xerox 7 125% Due 06-15-10	25,362.50		25,000.00		-362 50
08-13-01	06-28-10	0 88	Exxon Mobil	6.17		51 34		45.17
07-10-09	08-31-10	600 00	EnCana (US shs)	14,234 44		16,562 37		2,327 93
06-25-04	09-29-10	188 000	Renaissance Hldg Ltd Pfd C 6 08%	4,113 27		4,448 00		334.73
06-25-04	09-30-10	2,012 000	Renaissance Hldg Ltd Pfd C 6 08%	44,020 75		47,321 03		3,300 28
03-12-09	10-06-10	2,000 00	Discovery Comm Cl C	29,400 00		76,902 70		47,502 70
11-12-10	11-12-10	322.35	Cardinal Health Cl Act **Consult Tax**	0.00		322 35	322 35	
05-20-09	11-15-10	600 00	Medtronic	19,349 32		20,748.13		1,398 81
05-20-09	11-15-10	200 00	Medtronic	6,444 04		6,916 04		472 00
11-22-10	11-22-10	128 39	Bristol-Myers Litigation **Consult Tax**	0 00		128 39	128 39	
06-02-08	12-23-10	50,000	Fedl Home Ln Bks 4 875% Due 03-11-11	51,866 50		50,427 50		-1,439 00
08-20-08	12-23-10	50,000	Fedl Home Ln Bks 3 625% Due 07-01-11	50,215 00		50,837 50		622 50
TOTAL GAINS							450 74	86,488 27
TOTAL LOSSES							0 00	-1,870 20
				295,594.57		380,663.39	450.74	84,618 07

TOTAL REALIZED GAIN/LOSS 85,068 81
NO CAPITAL GAINS DISTRIBUTIONS

This document is for informational purposes only The information and calculations are based upon the records of Harris Associates L.P , which may be different than the information, calculations and records of the custodian of your account Harris Associates L.P does not make any representations or warranty as to the information and calculations herein and specifically disclaims any liability with regard to its use. Harris Associates L.P. urges you to consult your tax or legal advisers to assist you with your tax planning and reporting needs

Form **8868** (Rev. January 2011) Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ **File a separate application for each return.**

OMB No 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box ▶ [X]
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions) For more details on the electronic filing of this form, visit *www irs gov/efile* and click on *e-file for Charities & Nonprofits*

Part I **Automatic 3-Month Extension of Time.** Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ▶ [ ]

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Type or print		
File by the due date for filing your return See instructions	Name of exempt organization JEROME H. STONE FAMILY FOUNDATION C/O JEROME H. STONE ALZHEIMER'S ASSOC.	**Employer identification number** 36-6061300
	Number, street, and room or suite no. If a P O. box, see instructions. 225 N. MICHIGAN AVE, 17TH FLOOR	
	City, town or post office, state, and ZIP code For a foreign address, see instructions CHICAGO, IL 60601	

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-T (corporation)	07
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

- The books are in the care of ▶ JEROME H. STONE 225 N. MICHIGAN AVE, 17TH FLOOR - CHICAGO, IL 60601

  Telephone No ▶ 312-335-5808 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.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2011, to file the exempt organization return for the organization named above The extension is for the organization's return for:

▶ [X] calendar year 2010 or

▶ [ ] tax year beginning ________, and ending ________.

2 If the tax year entered in line 1 is for less than 12 months, check reason: [ ] Initial return [ ] Final return [ ] Change in accounting period

3a 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	3a	$	1,523.
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	3b	$	9,051.
c **Balance due.** Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions.	3c	$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

LHA **For Paperwork Reduction Act Notice, see Instructions.** Form **8868** (Rev. 1-2011)

023841 01-03-11

• 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).

Part II **Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed)

Type or print	Name of exempt organization	Employer identification number
File by the extended due date for filing your return. See instructions.	JEROME H. STONE FAMILY FOUNDATION C/O JEROME H. STONE ALZHEIMER'S ASSOC.	36-6061300
	Number, street, and room or suite no. If a P.O. box, see instructions. 225 N. MICHIGAN AVE, 17TH FLOOR	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions CHICAGO, IL 60601	

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.

• The books are in the care of ▶ JEROME H. STONE 225 N. MICHIGAN AVE, 17TH FLOOR - CHICAGO, IL 60601

Telephone No ▶ 312-335-5808 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
THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE TAX RETURN IS NOT YET AVAILABLE.

8a	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.	8a	$ 1,523.
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.	8b	$ 9,051.
c	**Balance due.** Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	$ 0.

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 ▶ CPA Date ▶ 8-12-11

023842
01-24-11