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 , 2010, and ending ,

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

American Longevity Research Institute, I
1510 W. Montana Street
Chicago, IL 60614

A Employer identification number
39-1539493

B Telephone number (see the instructions)
773-528-6100

C If exemption application is pending, check here ► [ ]
D 1 Foreign organizations, check here ► [ ]
2 Foreign organizations meeting the 85% test, check here and attach computation ► [ ]
E If private foundation status was terminated under section 507(b)(1)(A), check here ► [ ]
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► [ ]

H Check type of organization [X] Section 501(c)(3) exempt private foundation
[ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, column (c), line 16)* ► $ 1,761,817.

J Accounting method [X] Cash [ ] Accrual
[ ] Other (specify)
(Part I, column (d) must be on cash basis)

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions))*	**(a)** Revenue and expenses per books	**(b)** Net investment income	**(c)** Adjusted net income	**(d)** Disbursements for charitable purposes (cash basis only)
REVENUE				
1 Contributions, gifts, grants, etc, received (att sch)				
2 Ck ► [X] if the foundn is **not** req to att Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	37,879.	37,879.	37,879.	
5a Gross rents				
b Net rental income or (loss)				
6a Net gain/(loss) from sale of assets not on line 10	27,543.			
b Gross sales price for all assets on line 6a				
7 Capital gain net income (from Part IV, line 2)				
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit/(loss) (att sch)				
11 Other income (attach schedule)				
12 **Total.** Add lines 1 through 11	65,422.	37,879.	37,879.	
OPERATING AND ADMINISTRATIVE EXPENSES				
13 Compensation of officers, directors, trustees, etc	0.			
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach sch)				
c Other prof fees (attach sch)				
17 Interest				
18 Taxes (attach schedule)(see instr) See Stm 1	36.		36.	
19 Depreciation (attach sch) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) See Statement 2	2,620.	2,336.	284.	
24 **Total operating and administrative expenses.** Add lines 13 through 23	2,656.	2,336.	320.	
25 Contributions, gifts, grants paid	65,000.			65,000.
26 **Total expenses and disbursements.** Add lines 24 and 25	67,656.	2,336.	320.	65,000.
27 Subtract line 26 from line 12:				
a **Excess of revenue over expenses and disbursements**	-2,234.			
b **Net investment income** (if negative, enter -0-)		35,543.		
c **Adjusted net income** (if negative, enter -0-)			37,559.	

RECEIVED
AUG 1 8 2011
IRS-OSC
OGDEN, UT

SCANNED AUG 1 7 2011

914

21

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

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
	1 Cash – non-interest-bearing	658.	338.	338.
	2 Savings and temporary cash investments		6,126.	6,126.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch) ▶			
ASSETS	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	40,000.		
	10a Investments – U S and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule) Statement 3	1,569,140.	1,628,440.	1,755,353.
	c Investments – corporate bonds (attach schedule)	18,776.		
	11 Investments – land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers – see instructions Also, see page 1, item I)	1,628,574.	1,634,904.	1,761,817.
LIABILITIES	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons St 4	3,500.	3,500.	
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	3,500.	3,500.	
NET ASSETS OR FUND BALANCES	**Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.** ▶ [X]			
	24 Unrestricted	1,625,074.	1,631,404.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ [ ]			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances** (see the instructions)	1,625,074.	1,631,404.	
	31 **Total liabilities and net assets/fund balances** (see the instructions)	1,628,574.	1,634,904.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year – Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,625,074.
2	Enter amount from Part I, line 27a	2	-2,234.
3	Other increases not included in line 2 (itemize) ▶ See Statement 5	3	8,564.
4	Add lines 1, 2, and 3	4	1,631,404.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	1,631,404.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a	N/A			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e				

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

	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss) — If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 — **2**

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)

If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8 — **3**

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2009	42,301.		
2008	82,217.		
2007	124,045.	2,460,852.	0.050407
2006	125,000.	2,168,057.	0.057655
2005	200,750.	2,150,441.	0.093353

2	**Total** of line 1, column (d)	2	0.201415
3	Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.040283
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	
5	Multiply line 4 by line 3	5	
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	355.
7	Add lines 5 and 6	7	355.
8	Enter qualifying distributions from Part XII, line 4	8	65,000.

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

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

1 a	Exempt operating foundations described in section 4940(d)(2), check here ► [ ] and enter 'N/A' on line 1 Date of ruling or determination letter: _______ (attach copy of letter if necessary – see instr.)		
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	355.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	355.
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	355.
6	Credits/Payments		
a	2010 estimated tax pmts and 2009 overpayment credited to 2010 — 6a: 3,647.		
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	3,647.
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	0.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ►	10	3,292.
11	Enter the amount of line 10 to be: **Credited to 2011 estimated tax** ► 3,292. **Refunded** ►	11	0.

Part VII-A Statements Regarding Activities

			Yes	No
1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see the 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?	4b		X
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, column (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see the instructions) ► N/A			
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)*

			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 ► RONALD M. KLATZ Telephone no. ► 773-528-6100

Located at ► 1510 W. MONTANA STREET CHICAGO IL ZIP + 4 ► 60614

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** – Check here N/A ► ☐

and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A

			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 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

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.

			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No			
b	If any answer is 'Yes' to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)?	1b	N/A	
	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 ► 20__ , 20__ , 20__ , 20__			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer 'No' and attach statement – see the instructions)	2b	N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ► 20__ , 20__ , 20__ , 20__			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If 'Yes,' did it have excess business holdings in 2010 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010)*	3b	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b		X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc, organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)? **5b** N/A

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

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** X (No)

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 (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RONALD KLATZ 1510 W. MONTANA STREET CHICAGO, IL 60614	President 10.00	0.	0.	0.
ROBERT M. GOLDMAN 1510 W. MONTANA STREET CHICAGO, IL 60614	Vice Preside 10.00	0.	0.	0.

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

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

Total number of other employees paid over $50,000 ► 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
None		
Total number of others receiving over $50,000 for professional services ►		0

Part IX-A Summary of Direct Charitable Activities

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

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

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

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

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	
2a	Tax on investment income for 2010 from Part VI, line 5	2a	355.		
b	Income tax for 2010 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	355.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	-355.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	-355.
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	0.

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	65,000.
b	Program-related investments — total from Part IX-B	1b	
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	65,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	355.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	64,645.

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					0.
2 Undistributed income, if any, as of the end of 2010.					
a Enter amount for 2009 only				0.	
b Total for prior years 20___, 20___, 20___			0.		
3 Excess distributions carryover, if any, to 2010					
a From 2005					
b From 2006					
c From 2007	6,912.				
d From 2008	82,535.				
e From 2009	42,500.				
f **Total** of lines 3a through e		131,947.			
4 Qualifying distributions for 2010 from Part XII, line 4 ► $ 65,000.					
a Applied to 2009, but not more than line 2a				0.	
b Applied to undistributed income of prior years (Election required – see instructions)			0.		
c Treated as distributions out of corpus (Election required – see instructions)		0.			
d Applied to 2010 distributable amount					0.
e Remaining amount distributed out of corpus		65,000.			
5 Excess distributions carryover applied to 2010 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		0.			0.
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		196,947.			
b Prior years' undistributed income Subtract line 4b from line 2b			0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed			0.		
d Subtract line 6c from line 6b Taxable amount – see instructions			0.		
e Undistributed income for 2009. Subtract line 4a from line 2a Taxable amount – see instructions				0.	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011					0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)		0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions)		0.			
9 **Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a		196,947.			
10 Analysis of line 9					
a Excess from 2006					
b Excess from 2007	6,912.				
c Excess from 2008	82,535.				
d Excess from 2009	42,500.				
e Excess from 2010	65,000.				

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 organization had $5,000 or more in assets at any time during the year — see 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))

None

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 ▶ [X] 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

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

c Any submission deadlines

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

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*				
Total			► **3a**	
b *Approved for future payment*				
Total			► **3b**	

Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities	14	37,879.			
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		27,543.			
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)		65,422.			

13 **Total.** Add line 12, columns (b), (d), and (e) 13 65,422.

(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) (See the instructions)
N/A	

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 of officer or trustee | Date 8-12-11 | Title Vice President

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check if ☐ if self-employed	PTIN
Shari Taylor	Shari Taylor CPA	8-10-11		P00451642

Firm's name ▶ SHARI TAYLOR AND CO., CHARTERED — Firm's EIN ▶ 36-3097631

Firm's address ▶ 707 SKOKIE BLVD., STE 600, NORTHBROOK, IL 60062-2841 — Phone no (847) 291-0192

TEEA0503L 02/15/11

Statement 1
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
	$ 36.		$ 36.	
Total	$ 36.	$ 0.	$ 36.	$ 0.

Statement 2
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
LICENSES AND FEES	$ 284.		$ 284.	
MANAGEMENT FEES	2,336.	$ 2,336.		
Total	$ 2,620.	$ 2,336.	$ 284.	$ 0.

Statement 3
Form 990-PF, Part II, Line 10b
Investments - Corporate Stocks

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
	Cost	$ 1,628,440.	$ 1,755,353.
	Total	$ 1,628,440.	$ 1,755,353.

Statement 4
Form 990-PF, Part II, Line 20
Loans from Officers, Directors, Trustees, and Key Employees

		Balance Due
Lender's Name:		
Lender's Title:		
Date of Note:		
Maturity Date:		
Repayment Terms:		
Interest Rate:		
Security Provided:		
Purpose of Loan:		
Desc. of Consideration:		
FMV of Consideration:	0.	
Original Amount:	3,500.	
Balance Due:		$ 3,500.
	Total	$ 3,500.

Statement 5
Form 990-PF, Part III, Line 3
Other Increases

NET UNRREALIZED GAIN	$ 8,564.
Total	$ 8,564.

Form **8868** (Rev January 2011)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

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

- 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: American Longevity Research Institute, I

Employer identification number: 39-1539493

Number, street, and room or suite number If a P O box, see instructions: 1510 W. Montana Street

City, town or post office, state, and ZIP code For a foreign address, see instructions: Chicago, IL 60614

Enter the Return code for the return that this application is for (file a separate application for each return) 04

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 (section 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 ► RONALD M. KLATZ

Telephone No ► 773-528-6100 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 8/15, 20 11, to file the exempt organization return for the organization named above The extension is for the organization's return for

► [X] calendar year 20 10 or

► [ ] tax year beginning ________, 20 ___, and ending ________, 20 ___

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**	$ 355.
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**	$ 3,647.
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

Mesirow Financial
www.mesirowfinancial.com

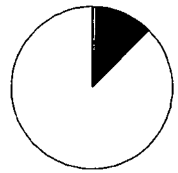
Account Number
3530-4268
Statement Period
Dec 1 - December 31, 2010
Last Statement Period
November 2010

5322 1 1 001
AMERICAN LONGEVITY RESEARCH
INSTITUTE INC
1510 W MONTANA ST
CHICAGO IL 60614-2008

Investment Executive: 70L8
COHEN/SCHER TEAM
MESIROW FINANCIAL, INC
353 N CLARK ST
CHICAGO, IL 60654-4700
(312) 595-6033

Account Access
https //eview mesirowfinancial com/privateclient

PORTFOLIO ALLOCATION



Investment Category	Account Value Percentage	Account Value
Cash and Cash Equivalents	0.35%	$6,126 37
Preferred Stocks	12 16%	$214,163.20
Mutual Funds	87.49%	$1,541,189.84
Total	**100.00%**	**$1,761,479.41**

PORTFOLIO SUMMARY

	Current Month Value	Last Statement Value
Cash and Cash Equivalents	$6,126 37	$17,382.37
Equities		
Preferred Stocks	214,163 20	193,017 20
Options		
Taxable Fixed Income		3,794 66
Tax-Exempt Fixed Income		
Mutual Funds	1,541,189.84	1,493,828.67
Other		
Total Portfolio Value	**$1,761,479.41**	**$1,708,022.90**

CASH ACTIVITY SUMMARY

	Current Month	Year To Date
Opening Cash and Fund Balance	$17,382.37	
Income/Distributions	22,077.03	44,950 79
Net Securities Bought/Sold	(12,059 85)	(28,974 50)
Net Redemptions/Exchanges	3,721.39	3,721.39
Funds Deposited	0.00	2,842.93
Funds Withdrawn	0.00	(36.02)
Management Fees	0.00	(2,807 37)
12b1 Credits	5 43	471.45
Miscellaneous	(25,000.00)	(14,042 30)
Closing Cash and Fund Balance	**$6,126.37**	

INCOME SUMMARY

	Current Month	Year To Date
Reportable Dividends	$14,988.15	$37,467.22
Reportable Interest	17 06	411.75
Long Term Capital Gains	7,071 82	7,071.82
Total	**$22,077.03**	**$44,950.79**

REALIZED GAIN/(LOSS) SUMMARY

	Current Period	Year To Date
Realized Gains	$570 91	$35,387.90
Realized Losses	$0 00	($7,844.97)

PORTFOLIO POSITIONS

PREFERRED STOCKS

Description	Symbol/ Cusip	Quantity	Unit Cost	Total/Adj Cost	Market Price	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Current Yield	Acct Type
BARCLAYS BANK PLC IPATH DOW JONES UBS COMMODITY INDEX TOTAL RETURN	DJP/ 06738C778	4,360	41 2698	179,936 76	49.12	214,163.20	34,226 44			C
Total						**$214,163.20**	**$34,226.44**			

MUTUAL FUNDS

Description	Symbol/ Cusip	Quantity		Unit Cost	Total Cost	Market Price	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Current Yield	Acct Type
IVA FIDUCIARY TRUST IVA WORLDWIDE FD CLASS I	IVWIX 45070A206	27,709 976	P	15 0416	416,802 60	16 72	463,310 63	46,508 19			C
		1,783 422	R	15 6643	27,936 01	16 72	29,818 98	1,882 79			C
		29,493 398			444,738 61		493,129 61	48,390 98			
					Cost of Current Holdings Excluding Reinvestments:				**$416,802.60**		
					Market Value of Total Holdings:				**$493,129.61**		
LOOMIS SAYLES FDS I BOND FD INSTL CL	LSBDX 543495840	6,433 637	P	14 0000	90,070 91	14.27	91,807.94	1,737 08			C
		291 128	R	13 9326	4,056 18	14.27	4,154 45	98 17			C
		6,724.765			94,127 09		95,962.39	1,835 25			
					Cost of Current Holdings Excluding Reinvestments:				**$90,070.91**		
					Market Value of Total Holdings:				**$95,962.39**		
OPPENHEIMER INTL BOND FUND CLASS Y	OIBYX 68380T509	24,311 100	P	6 6700	162,155 03	6 56	159,480 57	(2,674 22)			C
		2,567 286	R	6 4400	16,533.29	6 56	16,841.64	308 03			C
		26,878 386			178,688 32		176,322.21	(2,366 19)			
					Cost of Current Holdings Excluding Reinvestments:				**$162,155.03**		
					Market Value of Total Holdings:				**$176,322.21**		
PIMCO FUNDS DEVELOPING LOCAL MARKET FUND INSTL CL	PLMIX 72201F409	15,549 077	P	10 2900	160,000.00	10 60	164,820.06	4,820 21			C
		184 257	R	10 2376	1,886.35	10 60	1,953.28	66 74			C
		15,733.334			161,886 35		166,773.34	4,886 95			
					Cost of Current Holdings Excluding Reinvestments:				**$160,000.00**		
					Market Value of Total Holdings:				**$166,773.34**		

Mesirow Financial™
www.mesirowfinancial.com

AMERICAN LONGEVITY RESEARCH
INSTITUTE INC
1510 W MONTANA ST
CHICAGO IL 60614-2008

Account Number
3530-4268
Statement Period
Dec 1 - December 31, 2010

PORTFOLIO POSITIONS (CONTINUED)

MUTUAL FUNDS (continued)

Description	Symbol/ Cusip	Quantity		Unit Cost	Total Cost	Market Price	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Current Yield	Acct Type
PIMCO FUNDS UNCONSTRAINED BOND FUND	PFIUX 72201M487	8,992 806	P	11 1200	100,000 00	11 10	99,820.06	(179 86)			C
INSTL CL		145 678	R	11 1772	1,628.27	11 10	1,617 11	(11 30)			C
		9,138 484			101,628 27		101,437 17	(191.16)			
					Cost of Current Holdings Excluding Reinvestments:				**$100,000.00**		
					Market Value of Total Holdings:				**$101,437.17**		
TEMPLETON GLOBAL BOND FD CL A	TPINX 880208103	11,938 853	P	12 7757	152,526 63	13 59	162,248 96	9,722.37			C
		1,025 517	R	13 2203	13,557.69	13 59	13,936 82	379.00			C
		12,964 370			166,084 32		176,185 78	10,101.37			
					Cost of Current Holdings Excluding Reinvestments:				**$152,526.63**		
					Market Value of Total Holdings:				**$176,185.78**		
THORNBURG INVT TR INTL VALUE FD CL I	TGVIX 885215566	11,520 737	P	26 0400	300,000.00	28 64	329,953 79	29,953.90			C
		49 771	R	27 1262	1,350 10	28 64	1,425 55	75 34			C
		11,570 508			301,350 10		331,379 34	30,029 24			
					Cost of Current Holdings Excluding Reinvestments:				**$300,000.00**		
					Market Value of Total Holdings:				**$331,379.34**		
Total							**$1,541,189.84**	**$92,686.44**			

P = PURCHASE   R = REINVESTMENT

C = CASH ACCOUNT   M = MARGIN ACCOUNT   * = NOT AVAILABLE

MONEY FUND SUMMARY

FEDERATED PRIME OBLIGATIONS FUND

Date	Description	Amount	Date	Description	Amount	Date	Description	Amount	Date	Description	Amount
12/17	PURCHASE	$5 43	12/23	SALE	($17,387.80)	12/28	PURCHASE	$6,126.36	12/31	REINVEST DIVIDEND	$0.01

BALANCE: **$6,126.37**   **30 DAY CURRENT YIELD:** **0.01%**

Mesirow Financial™
www.mesirowfinancial.com

AMERICAN LONGEVITY RESEARCH
INSTITUTE INC
1510 W MONTANA ST
CHICAGO IL 60614-2008

Account Number
3530-4268
Statement Period
Dec 1 - December 31, 2010

DAILY ACCOUNT ACTIVITY

Date	Acct Type	Transaction	Quantity	Description	Price	Amount	Balance
							$0.00
12/01	C	CASH DIVIDEND		OPPENHEIMER INTL BOND FUND CLASS Y 113010 26,512 35300		$623 93	623 93
12/01	C	REINVEST DIVIDEND	96.434	OPPENHEIMER INTL BOND FUND CLASS Y REINVEST AT 6 470		(623 93)	0 00
12/01	C	CASH DIVIDEND		PIMCO FUNDS UNCONSTRAINED BOND FUND INSTL CL 113010 9,118 80700		215 81	215 81
12/01	C	REINVEST DIVIDEND	19 252	PIMCO FUNDS UNCONSTRAINED BOND FUND INSTL CL REINVEST AT 11 210		(215 81)	0 00
12/02	C	CASH DIVIDEND		PIMCO FUNDS DEVELOPING LOCAL MARKET FUND INSTL CL 113010 15,733 33400		316 91	316 91
12/02	C	REINVEST DIVIDEND	30.619	PIMCO FUNDS DEVELOPING LOCAL MARKET FUND INSTL CL REINVEST AT 10 350		(316 91)	0 00
12/09	C	LT CAPITAL GAIN		PIMCO FUNDS UNCONSTRAINED BOND FUND INSTL CL 120810 9,138 48400		29 00	29 00
12/09	C	ST CAPITAL GAIN		PIMCO FUNDS UNCONSTRAINED BOND FUND INSTL CL 120810 9,135 86900		189 22	218 22
12/09	C	REINV ST CAP GAIN	17 062	PIMCO FUNDS UNCONSTRAINED BOND FUND INSTL CL REINVEST AT 11 090		(189.22)	29 00
12/09	C	REINV LT CAP GAIN	2 615	PIMCO FUNDS UNCONSTRAINED BOND FUND INSTL CL REINVEST AT 11.090		(29 00)	0 00
12/10	C	CASH DIVIDEND		LOOMIS SAYLES FDS I BOND FD INSTL CL 120910 7,433 98500		699 30	699 30
12/10	C	REINVEST DIVIDEND	49 596	LOOMIS SAYLES FDS I BOND FD INSTL CL REINVEST AT 14 100		(699 30)	0 00

DAILY ACCOUNT ACTIVITY (CONTINUED)

Date	Acct Type	Transaction	Quantity	Description	Price	Amount	Balance
12/16	C	CASH DIVIDEND		TEMPLETON GLOBAL BOND FD CL A 121510 12,964 37000		2,326 68	2,326 68
12/16	C	REINVEST DIVIDEND	173 374	TEMPLETON GLOBAL BOND FD CL A REINVEST AT 13.420		(2,326 68)	0 00
12/16	C	12B1 CREDIT		12B-1 REBATE AMERICAN FU		5 43	5 43
12/17	C	ST CAPITAL GAIN		IVA FIDUCIARY TRUST IVA WORLDWIDE FD CLASS I 121510 29,493 39800		6,593 47	6,598 90
12/17	C	LT CAPITAL GAIN		IVA FIDUCIARY TRUST IVA WORLDWIDE FD CLASS I 121510 29,493 39800		5,386 86	11,985 76
12/17	C	CASH DIVIDEND		IVA FIDUCIARY TRUST IVA WORLDWIDE FD CLASS I 121510 29,493 39800		2,945 04	14,930 80
12/17	C	REINV ST CAP GAIN	397 916	IVA FIDUCIARY TRUST IVA WORLDWIDE FD CLASS I REINVEST AT 16 570		(6,593 47)	8,337 33
12/17	C	REINV LT CAP GAIN	325 097	IVA FIDUCIARY TRUST IVA WORLDWIDE FD CLASS I REINVEST AT 16 570		(5,386 86)	2,950 47
12/17	C	REINVEST DIVIDEND	177 733	IVA FIDUCIARY TRUST IVA WORLDWIDE FD CLASS I REINVEST AT 16 570		(2,945 04)	5 43
12/17	C	PURCHASE		FEDERATED PRIME OBLIGATIONS FUND SERVICE SHARE CLASS	1 0000	(5 43)	0 00
12/22	C	SALE	(709 220)	LOOMIS SAYLES FDS I BOND FD INSTL CL	14 1000	10,000 00	10,000 00
12/23	C	CASH DIVIDEND		FEDERATED PRIME OBLIGATIONS FUND SERVICE SHARE CLASS		0 11	10,000 11
12/23	C	SALE		FEDERATED PRIME OBLIGATIONS FUND SERVICE SHARE CLASS	1.0000	17,387 80	27,387 91
12/23	C	JOURNAL ENTRY		35304268 T 73146879		(25,000 00)	2,387 91
12/27	C	INTEREST		CITIGROUP MTG SECS INC REMIC SER 2004-5 CL 1A7 MONTHLY 24 DAY DELAY CPN 5 500% DUE 08/25/34 DTD 08/01/04 FC 09/25/04 122510 50,000		17 06	2,404 97

Mesirow Financial™
www.mesirowfinancial.com

AMERICAN LONGEVITY RESEARCH
INSTITUTE INC
1510 W MONTANA ST
CHICAGO IL 60614-2008

Account Number
3530-4268
Statement Period
Dec 1 - December 31, 2010

DAILY ACCOUNT ACTIVITY (CONTINUED)

Date	Acct Type	Transaction	Quantity	Description	Price	Amount	Balance
12/27	C	REDEMPTION	(50,000)	CITIGROUP MTG SECS INC REMIC SER 2004-5 CL 1A7 MONTHLY 24 DAY DELAY CPN 5.500% DUE 08/25/34 DTD 08/01/04 FC 09/25/04		3,721 39	6,126.36
12/28	C	PURCHASE		FEDERATED PRIME OBLIGATIONS FUND SERVICE SHARE CLASS	1.0000	(6,126 36)	0 00
12/29	C	CASH DIVIDEND		THORNBURG INVT TR INTL VALUE FD CL I 122710 11,570.50800		347 10	347.10
12/29	C	REINVEST DIVIDEND	12.205	THORNBURG INVT TR INTL VALUE FD CL I REINVEST AT 28.440		(347 10)	0 00
12/31	C	LT CAPITAL GAIN		OPPENHEIMER INTL BOND FUND CLASS Y 123010 26,878 38600		1,655 96	1,655 96
12/31	C	CASH DIVIDEND		OPPENHEIMER INTL BOND FUND CLASS Y 123010 26,878 38600		730 57	2,386 53
12/31	C	REINV LT CAP GAIN	253.982	OPPENHEIMER INTL BOND FUND CLASS Y REINVEST AT 6 520		(1,655 96)	730 57
12/31	C	REINVEST DIVIDEND	112.051	OPPENHEIMER INTL BOND FUND CLASS Y REINVEST AT 6 520		(730 57)	0 00
12/31	C	CASH DIVIDEND		FEDERATED PRIME OBLIGATIONS FUND SERVICE SHARE CLASS 123110 6,126		0 01	0 01
12/31	C	REINVEST DIVIDEND		FEDERATED PRIME OBLIGATIONS FUND SERVICE SHARE CLASS		(0 01)	0.00
							$0.00

Mesirow Financial™
www.mesirowfinancial.com

AMERICAN LONGEVITY RESEARCH
INSTITUTE INC
1510 W MONTANA ST
CHICAGO IL 60614-2008

Account Number
3530-4268
Statement Period
Dec 1 - December 31, 2010

REALIZED GAIN/(LOSSES)

Description	Date Acquired	Date Sold	Quantity	Purchase Price	Sale Price	Cost Basis	Proceeds	Realized Gain/Loss	Short/ Long Term
CITIGROUP MTG SECS INC REMIC SER 2004-5 CL 1A7 MONTHLY 24 DAY DELAY CPN 5 500% DUE 08/25/34 DTD 08/01/04 FC 09/25/04	08/13/04	12/27/10	50,000	$99 00	$100 00	$49,500.00	$3,721 39	$500 00	LT
LOOMIS SAYLES FDS I ^ BOND FD INSTL CL	04/30/10	12/22/10	709.220	$14.00	$14.10	$9,929.09	$10,000 00	$70 91	ST
Total						**$59,429.09**	**$13,721.39**	**$570.91**	

If you haven't done so already, enroll now for electronic delivery of trade confirmations and statements and eliminate the paper versions. You can receive immediate notification that your document is ready. It's safe and secure at no additional cost to you. Just register for online account access through Mesirow Financial's e-view at https.//eview.mesirowfinancial.com/privateclient and go to the **My e-view** tab and click the **My Profile** link to enroll.

Unpriced securities are not included in the Market Value column of your account balance information Valuations of security positions are obtained from an independent source. While our source is considered reliable, prices are approximations and may not reflect prevailing market quotes. THIS IS ESPECIALLY TRUE FOR BOND PRICES The valuations on your statements are provided only as a general guideline to portfolio value. Estimated Annual Income and Yield information for certain Unit Trusts with monthly income distributions may not correctly reflect the actual rate of return Market values for Certificates of Deposit (CDs) are provided on account statements These estimated prices are based on a computer pricing model and may or may not reflect the actual secondary market price of the security Fixed-Income security prices reflect prices available from our security pricing services or other sources believed to be reliable Such prices may be several days different from your statement date.

Size and valuations of positions in funds of funds or other non-exchange traded securities shown on your account statements are received from sponsors or third parties generally believed to be reliable, but Mesirow Financial, Inc does not conduct due diligence on the information so provided Accordingly, MFI cannot warranty the accuracy of this information or guarantee that you will be able to sell your positions at or close to the listed valuations. Furthermore, the size and valuations included on your account statement may not be current as of your statement dated depending on when Mesirow Financial has received updated information from such sources.

PLEASE DO NOT USE THIS STATEMENT TO PREPARE YOUR 2010 TAX RETURN. TAX REPORTING INFORMATION WILL BE MAILED TO YOU ON FEBRUARY 15, 2011. INFORMATION ABOUT OUR ROUTING PRACTICES CAN BE FOUND ON OUR WEBSITE UNDER SEC DISCLOSURES.

Realized Gains & Losses

Quick Links

Account Number. 35304268 (AMERICAN LONGEVITY RESEARCH)

Today's Date = 08/10/2011

From 01/01/2010 To 12/31/2010 Or Choose Duration Search Schedule D

Collapse/Expand All Open/Close View View Unrealized Gains

Security Type	Security	Purchase Date	Sale Date	Quantity	Unit Cost	Cost Basis	Sale Price	Proceeds	Gain/Loss	Gain/Los Percen
EQUITIES						$384,101.32		$389,262.51	$5,161.19	1.34%
	GLD 78463V107 SPDR GOLD TRUST GOLD ETF			3000	114 0299	$342,089 80	115 4785	$346,435 64	$4,345 84	1 27%
	TIP 464287176 ISHRS BRCLYS TIPS BD ETF			396	106 0897	$42,011 52	108 1487	$42,826 87	$815 35	1 94%
FIXED INCOME						$3,221.39		$3,721.39	$500.00	15.52%
	F 172973YX1 172973YX1 CMSI 04-51A7 5 5 082534			50000	6 4428	$3,221 39	7.4428	$3,721 39	$500 00	15 52%
MUTUAL FUNDS						$905,845.40		$927,727.14	$21,881.74	2.42%
	BFWFX 140541822 CAPITAL WORLD BD FD F 2			8034 102	20 1054	$161,529 19	20 66	$165,984 55	$4,455 36	2 76%
	ESIYX 94985D624 WF ADV INTL BOND FD CL A			14384 516	11 224	$161,451 83	11 7	$168,298 84	$6,847 01	4 24%
	LSBDX 543495840 LMS SYLS BOND FD INSTL			709 22	14	$9,929 09	14 1	$10,000 00	$70 91	0 71%
	OIBYX 68380T509 OPPENHEIMER INTL BD FD Y			35658 915	6 67	$237,844 97	6 45	$230,000 00	($7,844 97)	-3 30%

▶		PRRIX 693391104 PIMCO MGMT RL RTN INSTL	9050 197	11 1501	$100,910 78	11 43	$103,443.75	$2,532 97	2 51%
▶		TPINX 880208103 TEMPLETON GLBL BD FD A	18395 879	12 73	$234,179 54	13 59	$250,000 00	$15,820 46	6 76%
	TOTAL				**$1,293,168.11**		**$1,320,711.04**	**$27,542.93**	**15.52%**
	SHORT TERM TOTAL				**$1,289,946.72**		**$1,316,989.65**	**$27,042.93**	
	LONG TERM TOTAL				**$3,221.39**		**$3,721.39**	**$500.00**	

Quote data provided by Sungard Data Systems, Inc
NYSE and AMEX quotes are delayed by at least 20 minutes All other quotes are delayed by at least 15 minutes