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## Form **990-PF**

## **Return of Private Foundation**

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

OMB No 1545-0052

	Revenue Service Note. The foundation may	be able to use a copy of this i	return to satisfy state repo	rting requirements.	2010
For cal	endar year 2010, or tax year beginning	_	, and ending		,
G Che	eck all that apply: Initial return	Initial return of a for	rmer public charity	Final return	/
	Amended return	Address chang	je 🔲	Name change	$\nu$
Name	of foundation		_	A Employer identification	number
1					
	MARTHA & PHILIP SAGON	FAMILY FOUNI	DATION	52-6659386	
Numbe	er and street (or PO box number if mail is not delivered to street	address)	Room/suite	B Telephone number	
	5630 WISCONSIN AVENUE	41703		301-961-900	00
City o	r town, state, and ZIP code			C If exemption application is pe	nding, check here
	CHEVY CHASE, MD 2081	.5		D 1. Foreign organizations,	check here
H Che	eck type of organization: X Section 501(c)(3) ex	kempt private foundation		Foreign organizations mee check here and attach con	ting the 85% test,
		Other taxable private foundate	tion	E If private foundation state	
I Fair	market value of all assets at end of year   J   Accounts	ing method: X Cash	Accrual	under section 507(b)(1)(	
(fron	m Part II, col. (c), line 16)	ther (specify)		F If the foundation is in a 6	O-month termination
\$	1,743,956. (Part I, colu	ımn (d) must be on cash b	asıs.)	under section 507(b)(1)(	
Part	Analysis of Revenue and Expenses	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
	(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)	expenses per books	income	income	for charitable purposes (cash basis only)
$\top$	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check X if the foundation is not required to attach Sch. B				
	Interest on savings and temporary cash investments	10,061.	10,061.		STATEMENT 1
	4 Dividends and interest from securities	58,103.	57,768.	1	STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
ام	6a Net gain or (loss) from sale of assets not on line 10	177,758.			
Revenue	b Gross sales price for all assets on line 6a 350,550.				
6	7 Capital gain net income (from Part IV, line 2)		177,758.		
ا ۳	8 Net short-term capital gain				
	9 Income modifications				
1	Gross sales less returns and allowances	•			
	b Less Cost of goods sold				
	c Gross profit or (loss)		· · · · · · · · · · · · · · · · · · ·		
1	1 Other income				
1	2 Total Add Ines 1 through 11	245,922.	<u>245,587.</u>		
1:	3 I 1 1	0.	0.		0.
1	Ather employee sataries and wages				
ဖွ 1	Elension stans, employee benefits				
مانة	di Tarahi (a.a. I 🚃 I				
<u>B</u>	MACCOUNTING fees W STMT 3	2,300.	1,150.		1,150.
≓, Ä	ther professional fees				
CU SI, tive Exp	7 defeest S				
1 a G	8 Taxes				
inistra 1	1 666 1				
두 통 2	0' Occupancy				
July 1 0 Coll, and Administrative Expense 5 5 11 11 1	· · · · · · · · · · · · · · · · · · ·				
	- · · ·				4 4
		9,089.	4,545.		4,544.
z is   2	4 Total operating and administrative	14 222			
₹ق	expenses. Add lines 13 through 23	11,389.	5,695.		5,694.
	, , , , , ,	71,420.	* 1		71,420.
2	•	00 000	F 605		BB 444
+	Add lines 24 and 25	82,809.	5,695.		77,114.
2	7 Subtract line 26 from line 12:	100 110			
	a Excess of revenue over expenses and disbursements	163,113.	220 000		*
	b Net investment income (if negative, enter -0-)		239,892.	77/2	
L	C Adjusted net income (if negative, enter -0-)	<u> </u>		N/A	

1

For	m 99	0-PF (2010) MARTHA & PHILIP SAGON F		ION 52-	6659386 Page 2
P	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	<del></del>
_	-	Balance Sneets column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	Į.	Cash- non-interest-bearing	3.		<del></del>
	Į.	Savings and temporary cash investments	21,820.	49,800.	49,800.
	3				
		Less: allowance for doubtful accounts ▶			. <u>-</u>
	4	Pledges receivable -	*		
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable .			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons			
	7				
		Less: allowance for doubtful accounts			<del></del>
ets	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges	-		
•		Investments - U.S. and state government obligations	4 444 -44		
	l	Investments - corporate stock STMT 5	1,213,564.		
	C	Investments - corporate bonds STMT 6	146,250.	104,250.	161,726.
	11	Investments - land, buildings, and equipment basis			
		Less accumulated depreciation			
	ı	Investments - mortgage loans .			····
	13	Investments - other			
	14	Land, buildings, and equipment basis	and the Arthur and Affiliation of the Landson and American Stag Stade		
		Less accumulated depreciation			<del></del>
	15	Other assets (describe			
			4 004 605		4 - 44 - 4
		Total assets (to be completed by all filers)	1,381,637.	1,544,750.	1,743,956.
	17	,			
	18	Grants payable			
ies	19	Deferred revenue			
ij	20	Loans from officers, directors, trustees, and other disqualified persons			
Liabilities	21	Mortgages and other notes payable		-	;
	22	Other liabilities (describe			t
	_	T. 19 1997 (141) 479 1 1 000			r
	23		0.	0.	1
		Foundations that follow SFAS 117, check here			1
S		and complete lines 24 through 26 and lines 30 and 31.			1
2	24	Unrestricted			1
ala	25	Temporarily restricted			
<b>Assets or Fund Balances</b>	26	Permanently restricted  Foundations that do not follow SFAS 117, check here			1
Ë		•			
<u></u>	0.7	and complete lines 27 through 31.	ا م	0	
ets	27	Capital stock, trust principal, or current funds	0.	0.	1
\ss	28	Paid-in or capital surplus, or land, bldg., and equipment fund	1,381,637.	1,544,750.	
Net A	29	Retained earnings, accumulated income, endowment, or other funds	1,381,637.		
ž	30	Total net assets or fund balances	1,301,03/.	1,544,750.	
		Total linkilities and not association of bull	1 201 627	1 544 750	• 1
_	31	Total liabilities and net assets/fund balances	1,381,637.	1,544,750.	· · · · · · · · · · · · · · · · · · ·
-[-P	art <sup>.</sup>	III- Analysis of Changes in Net Assets or Fund B	alances		
1	Tota	net assets or fund balances at beginning of year - Part II, column (a), line	30		
٠		st agree with end-of-year figure reported on prior year's return)		1	1,381,637.
2		r amount from Part I, line 27a		2	163,113.
		r increases not included in line 2 (itemize)		3	0.
		lines 1, 2, and 3		4	1,544,750.
		eases not included in line 2 (itemize)		5	0.
		net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b), line 30	6	1,544,750.
_					Form <b>990-PF</b> (2010)

Form 990-PF (2010)			PHILIP SAC			DΑ	TIO	N	52	<u>2-665</u>	9386	Page 3
(a	)List and descr	ibe the kind(s	s) of property sold (e. ommon stock, 200 sh	g., real estate,		, b	How ac - Purc - Dona	nase ; `	c) Date a (mo., da	cquired ny, yr.)	(d) Da (mo., d	te sold ay, yr.)
1a		<u> </u>		•		- <u>-</u> -	Done	111011			-	
	TACHED	STATE	MENT								•	
C												
d												
<u>e</u>						Ц,						
(e) Gross sale	es price		eciation allowed r allowable)		t or other basis xpense of sale					in or (loss) (f) minus (		
<u>a</u>												
b				<u> </u>								<del></del> .
C								· · · · · · · · · · · · · · · · · · ·				
<u>d</u>	-0 550				170 70		_				100	750
	50,550.				172,79	2.						<u>,758.</u>
Complete only to	r assets snowin		mn (h) and owned by	T						ol. (h) gain i ot less than		
(i) F.M.V. as of	12/31/69		djusted basis of 12/31/69		cess of col. (1) col. (j), if any					(from col. (I		
<u>a</u>				<del> </del>	<u>-</u>							
b												
C			<del></del>									
<u>d</u>											100	750
е				<u> </u>		_					<u> </u>	<u>,758.</u>
2 Capital gain net in	come or (net ca	pital loss)	If gain, also enter -			}	2				177	,758.
lf gaın, also enter	ın Part I, line 8,		in sections 1222(5) a	and (6):		}				•-		
If (loss), enter -0-	in Part I, line 8	ndor Coo	tion 4940(e) fo	r Dodugod	Toy on Not	100	3	ant Inco		N/A		
			· · · · · · · · · · · · · · · · · · ·		·····	_		ient inco	ille			
(For optional use by o	iomestic private	toundations	subject to the section	1 4940(a) tax on	net investment in	com	e.)					
If section 4940(d)(2)	applies, leave th	ns part blank.										
Nilaa ilka ilawadalka h	abla fa- 4ba aaa4	4040 to	aa tha distrikutahla a		the been no							X No
			on the distributable a		•	iiou r					res	LAJ NU
			ion 4940(e). Do not c for each year; see inst			29						
	(a)	acii columii		iractions before	making any churc			<del> </del>	T	•	(d)	
Base pe	riód years		<b>(b)</b> Adjusted qualifying di	stributions	Net value of no	(c) oncha	) ritable-	use assets	١,	Distrib col. (b) divi	(d) ution ratio	(c))
Calendar year (or t		ig in)		72,631.	7101 74100 07710			1,213.		cor (b) div		52968
	009						_					45247
	008			78,097.				6,002.				45562
	007			05,720.				0,365. 4,541.		<del></del>		
	006			07,972.				$\frac{4,341}{3,174}$				47891 52642
	005		<u>+</u> .	12,823.			<u>, 14</u>	3,1/4.	+	<u> </u>		<u>52643</u>
2 Total of line 1, col									2	<u>-</u>	.2	44311
-			eriod - divide the total	on line 2 by 5,	or by the number	of ye	ears				•	
the foundation has	s been in exister	nce if less tha	n 5 years						3		.0	<u>48862</u>
4 Enter the net value	e of noncharitab	le-use assets	for 2010 from Part X	, line 5					4	· · · · · · · · · · · · · · · · · · ·	1,558	<u>,861.</u>
5 Multiply line 4 by	line 3						_		5		76	,169.
6 Enter 1% of net in	vestment incom	ne (1% of Par	t I, line 27b)						6		2	,399.
7 Add lines 5 and 6									7		78	,568.
8 Enter qualifying di	stributions from	n Part XII, line	4						8		77	,114.
	or greater than		the box in Part VI, lin	e 1b, and comp	lete that part usin	ıg a 1	% tax	rate.				

	990-PF (2010) MARTHA & PHILIP SAGON FAMILY 1 rt VI Excise Tax Based on Investment Income (Section 494	FOUNDATION 0(a), 4940(b), 4940(e),		-6659386 - see instru		Page 4 ns)
	Exempt operating foundations described in section 4940(d)(2), check here  and e  Date of ruling or determination letter:	nter "N/A" on line 1. essary-see instructions)				
	Domestic foundations that meet the section 4940(e) requirements in Part V, check here	and enter 1%	1	<u> </u>	4,7	<u>98.</u>
	of Part I, line 27b			ļ		
	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4%			-	-	^
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. O	iners enter -U-)	2	<del> </del>	4,7	0.
	Add lines 1 and 2	Whara antas O \	3_		4,/	0.
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. C	uners enter -u-)	4	<del> </del>	4 7	98.
	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	<del></del>	4,/	<del>90.</del>
	Credits/Payments:	6a   3,4!	- 0			
	2010 estimated tax payments and 2009 overpayment credited to 2010		79.			
	Exempt foreign organizations - tax withheld at source	6b   6c				1
	Tax paid with application for extension of time to file (Form 8868)	6d	$\dashv$			
	Backup withholding erroneously withheld  Total credits and payments. Add lines 6a through 6d	00.1	<del> </del> -,		3,4	5 Q
	· · · · · · · · · · · · · · · · · · ·	ahad	8		<u>, 4</u>	<u> </u>
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is atta Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	ched	9	-	1,3	30
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10		<u> </u>	39.
	Enter the amount of line 10 to be: Credited to 2011 estimated tax	Refunde	·	<del>                                     </del>		
	irt VII-A Statements Regarding Activities			<u>.l</u>		
	During the tax year, did the foundation attempt to influence any national, state, or local legis	elation or did it participate or inte	n/ene in		Yes	No
	any political campaign?	station of the it participate of inte	I VOITO III	1a		X
	Did it spend more than \$100 during the year (either directly or indirectly) for political purpo	eas /saa instructions for dafiniti	nn)2	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and	,	-	,,,		-
	distributed by the foundation in connection with the activities.	a copies of arry materials put	nisried of			
	Did the foundation file Form 1120-POL for this year?			1c	-	x
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the	yvoar.		10		
	(1) On the foundation.  \$		0.			!
	Enter the reimbursement (if any) paid by the foundation during the year for political expend					
	managers. > \$	itare tax imposed on touridation				
	Has the foundation engaged in any activities that have not previously been reported to the I	R\$2		2	·	X
	If "Yes," attach a detailed description of the activities.	no.				
	Has the foundation made any changes, not previously reported to the IRS, in its governing	instrument, articles of incorpora	tion or			l '
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the change		, 01	3		<b>X</b>
	Did the foundation have unrelated business gross income of \$1,000 or more during the year			4a	х	<b></b>
	If "Yes," has it filed a tax return on Form 990-T for this year?	,, .		4b	X	<del></del>
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	)		5		X
	If "Yes," attach the statement required by General Instruction T.			<u> </u>		<del></del>
	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied e	ither:				:
	By language in the governing instrument, or					
	By state legislation that effectively amends the governing instrument so that no mandator	v directions that conflict with th	e state law			١.
	remain in the governing instrument?	,		6	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year?			7	X	
	If "Yes," complete Part II, col. (c), and Part XV.					
	Enter the states to which the foundation reports or with which it is registered (see instruction	ons) ►				,
	MD					:
Ь	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the A	attorney General (or designate)	<del></del>			
	of each state as required by General Instruction G? If "No," attach explanation	-, -: -:(-:		8b	X	
	Is the foundation claiming status as a private operating foundation within the meaning of se	ection 4942(j)(3) or 4942(j)(5) fo	r calendar			
	year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," of			9		X
	Did any persons become substantial contributors during the tax year? If "Yes," attach a scheduler			10		X
				Form <b>990</b>	-PF(	2010)

	990-PF (2010) MARTHA & PHILIP SAGON FAMILY FOUNDATION 52-6659	386	1	Page 5
Pa	rt VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
	section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before			
	August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	_x	
	Website address ► N/A			
	The books are in care of ▶ MR. HAROLD ZIRKIN  Telephone no. ▶ 301-96	1-9	000	
	Located at ► 5630 WISCONSIN AVENUE #1703, CHEVY CHASE, MD ZIP+4 ►20	<u> 1815</u>		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		<b>&gt;</b>	
	and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	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	<u> </u>		
<u>Pa</u>	rt 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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(5) Transfer any income or assets to a disqualified person (or make any of either available			
	for the benefit or use of a disqualified person)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"			
	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.)			
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		l.	_
	before the first day of the tax year beginning in 2010?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			
	defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning			
	before 2010?			
	If "Yes," list the years			
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		
Ç	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
	<b>&gt;</b>			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	'		
	during the year?			
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,			_
		1 '	í I	
	Form_4720, to_determine if_the_foundation_had_excess_business_holdings_in_2010). N/A	3b	<u>اــــا</u>	
4a		3b 4a		Х
	Form 4720, to determine if the foundation had excess business holdings in 2010).  N/A	_		X

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orm 990-PF (2010) MARTHA & PHILIP SAGON FA			52-66593	86 Page 6
5a During the year did the foundation pay or incur any amount to:	Offit 4720 Way De F	required (conun	uea)	<del></del>
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	4945(e))2	□ v <sub>e</sub>	s X No	
(2) Influence the outcome of any specific public election (see section 4955); or				
any voter registration drive?			s X No	
(3) Provide a grant to an individual for travel, study, or other similar purposes'	7		s X No	
(4) Provide a grant to an organization other than a charitable, etc., organization				
509(a)(1), (2), or (3), or section 4940(d)(2)?		☐ Ye	s X No	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f			
the prevention of cruelty to children or animals?	***	Ye	s X No	1 1
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	ler the exceptions described i	n Regulations		_   .
section 53.4945 or in a current notice regarding disaster assistance (see instru	ctions)?		N/A L	5b
Organizations relying on a current notice regarding disaster assistance check h				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr				1
expenditure responsibility for the grant?	N	[/ <b>A</b> _ ∐ Υ∈	s L No	1
If "Yes," attach the statement required by Regulations section 53.4945	5-5 <i>(d).</i>			1
6a Did the foundation, during the year, receive any funds, directly or indirectly, to p	pay premiums on			1
a personal benefit contract?		Ye	es 🛣 No 📙	
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?		-	6b X
If "Yes" to 6b, file Form 8870.		۳.	[ <del>1</del> ]	
7a At any time during the tax year, was the foundation a party to a prohibited tax s		Ye	es X No	7b
b If 'Yes,' did the foundation receive any proceeds or have any net income attribution and the foundation About Officers, Directors, Trusto		nagare Highly		70
Part VIII Paid Employees, and Contractors	ees, roundation wa	nayers, riigini	,	
List all officers, directors, trustees, foundation managers and their	compensation.			
	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) Expense
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation	account, other allowances
HAROLD ZIRKIN	TRUSTEE, TREA	1	,,	
5630 WISCONSIN AVENUE, #1703	,			
CHEVY CHASE, MD 20815	5.00	0.	0.	0.
			-	
	,			
<del> </del>				
	1 de de come de 16 de come			
2 Compensation of five highest-paid employees (other than those inc	(b) Title, and average	enter "NONE."	(d) Contributions to	(e) Expense
(a) Name and address of each employee paid more than \$50,000	` hours per week `	(c) Compensation	(d) Contributions to employee benefit plans and deferred	account, other
NONE	devoted to position		compensation	allowances
NONE				
	<u> </u>			
· · · · · · · · · · · · · · · · · · ·				
	,			
				_
				-
Total number of other employees paid over \$50,000	·			0
			Form	990-PF (2010)

	52-66	<u>59386</u>	Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)	y		
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 serv	лсе	(c) Comp	ensation
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			
1 21/22			
2			
3			
4			
<del></del>			
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	<del></del>
1 N/A		741104111	
2			
All other program-related investments. See instructions.			
3			
	<u> </u>		
Total. Add lines 1 through 3	<b></b>	- 600 -	0.
		Form <b>990-P</b>	<b>-</b> (2010)

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations,	see instructions )
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	1,533,000.
Ь	Average of monthly cash balances	1b	49,600.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,582,600.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,582,600.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	23,739.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,558,861.
6	Minimum investment return. Enter 5% of line 5	6	77,943.
P	<b>Distributable Amount</b> (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here in and do not complete this part.)	id certain	
1	Minimum investment return from Part X, line 6	1	77,943.
2a	Tax on investment income for 2010 from Part VI, line 5	_	
b	Income tax for 2010. (This does not include the tax from Part VI.)  2b 729.		
C	Add lines 2a and 2b	2c	5,527.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	72,416.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	72,416.
6	Deduction from distributable amount (see instructions)	6	0.
<u>7_</u>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	72,416.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	, , , , , , , , , , , , , , , , , , , ,	1a	77,114.
Þ	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:		
а	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	77,114.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	77,114.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years.	qualifies for	the section

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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				72,416.
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 10,574.				
<b>b</b> From 2006			,	,
<b>c</b> From 2007				
d From 2008	~			
e From 2009 5, <b>410</b> .			•	
f Total of lines 3a through e	15,984.	- "		,
4 Qualifying distributions for 2010 from				
Part XII, line 4: ► \$ 77,114.				1
a Applied to 2009, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	_			ŀ
(Election required - see instructions)	0.			
d Applied to 2010 distributable amount				72,416.
e Remaining amount distributed out of corpus	4,698.			
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:				
& Corpus Add lines 3f, 4c, and 4e Subtract line 5	20,682.			,
b Prior years' undistributed income. Subtract				
line 4b from line 2b	-	0.		
c Enter the amount of prior years'		<u> </u>		
undistributed income for which a notice of				ſ
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.		<u> </u>	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.	<del></del>		
8 Excess distributions carryover from 2005				
not applied on line 5 or line 7	10,574.			
9 Excess distributions carryover to 2011.	10.100	-		
Subtract lines 7 and 8 from line 6a	10,108.			
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009 5,410. e Excess from 2010 4,698.				'
e Excess from 2010 4,698.			I	Form <b>990-PF</b> (2010)

Part XIV Private Operating F	& PHILIP SA				59386 Page 10
			A, question 9)	N/A	
1 a If the foundation has received a ruling o					
foundation, and the ruling is effective to	•	•	. ▶ └	1,0,0,0,00	0.40(.)(5)
b Check box to indicate whether the found		ig foundation described ii		4942(j)(3) or4	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year (a) 2010	(b) 2009	Prior 3 years (c) 2008	(d) 2007	(e) Tota!
income from Part I or the minimum	(2) 2010	(0) 2009	(6) 2006	(0) 2007	(e) iotai
investment return from Part X for					
each year listed .					<del> </del>
b 85% of line 2a					-
<ul> <li>Qualifying distributions from Part XII,</li> </ul>					
line 4 for each year listed	<del></del>				
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>b</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)					ļ
(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				<u> </u>	
Part XV Supplementary Info			if the foundatior	n had \$5,000 or m	ore in assets
at any time during t	he year-see the i	nstructions.)			<u></u>
1 Information Regarding Foundation	n Managers:				
a List any managers of the foundation wh			ributions received by the	e foundation before the clo	ose of any tax
year (but only if they have contributed r	nore than \$5,000). (See s	ection 507(d)(2).)			
HAROLD ZIRKIN					
b List any managers of the foundation wh	o own 10% or more of th	e stock of a corporation (	or an equally large port	on of the ownership of a p	partnership or
other entity) of which the foundation ha					
NONE					
2 Information Regarding Contribut	ion, Grant, Gift, Loan,	Scholarship, etc., Pr	ograms:		
Check here ▶ ☐ If the foundation of		• • • • • • • • • • • • • • • • • • • •	-	not accept unsolicited req	uests for funds. If
the foundation makes gifts, grants, etc.	=	*	-		
a The name, address, and telephone num	ber of the person to who	n applications should be	addressed:		
MR. HAROLD ZIRKIN, 3	•			<u> </u>	
5630 WISCONSIN AVENU	and the second s		MD 20815		
b The form in which applications should to	e submitted and informa	tion and materials they sh			
<b>LETTER EXPLAINING PU c</b> Any submission deadlines:	VEOSE OL RK	VIA T			
NO DEADLINES					
d Any restrictions or limitations on award			kınds of institutions, or	other factors:	
NO RESTRICTIONS OR L	IMITATIONS	ON AWARDS			

10

Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient show any relationship to Foundation Purpose of grant or Amount any foundation manager status of contribution Name and address (home or business) or substantial contributor recipient a Paid dunng the year NONE CHARITABLE GENERAL 29,420. NATIONAL SYMPHONY ORGANIZATI ORCHESTRA P.O.BOX 101510 ARLINGTON, VA 22210 12,500. THE PHILLIPS COLLECTION NONE CHARITABLE GENERAL ORGANIZATI 1600 21ST STREET, NW WASHINGTON, DC 20009 THE SEED FOUNDATION NONE CHARITABLE GENERAL 5,000. ORGANIZATI 1776 MASSACHUSETTS AVE, NW, SUITE 600 WASHINGTON, DC 20036 TRUST FOR THE NATIONAL NONE CHARITABLE GENERAL 4,500. ORGANIZATI MALL 601 13TH STREET, NW, SUITE 300 WASHINGTON, DC CHARITABLEGENERAL WETA FM NONE 15,000. 2775 SOUTH QUINCY STREET ORGANIZATI ARLINGTON, VA 22206 US INSTITUTE OF PEACE NONE CHARITABLE GENERAL 5,000. 1200 17TH STREET, NW ORGANIZATI WASHINGTON, DC 20036 71,420. ▶ 3a Total b Approved for future payment NONE 0. Total

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

Enter gross amounts unless otherwise indicated.	Unrelated	d business income		ed by section 512, 513, or 514	(e)	
	(a)	(b)	(c) Exclu-	(d)	Related or exempt	
1 Program service revenue:	Buširiess code	Amount	sion code	Amount	function income	
a						
b						
c						
d					-	
e	1 1					
1		-				
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash						
investments			14	10,061.		
4 Dividends and interest from securities			14	58,103.		
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	177,758.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a						
b						
c	ı					
d						
e						
12 Subtotal. Add columns (b), (d), and (e)			).	245,922.		
13 Total. Add line 12, columns (b), (d), and (e)				13	245,922	
(See worksheet in line 13 instructions to verify calculations.	)					

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).								
	N/A								
-									
-									

023621 12-07-10

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No 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) **b** Other transactions: (1) Sales of assets to a noncharitable exempt organization 1b(1) (2) Purchases of assets from a noncharitable exempt organization 1b(2) (3) Rental of facilities, equipment, or other assets 1b(3) X (4) Reimbursement arrangements 1b(4) (5) Loans or loan guarantees 1b(5) X 1b(6) (6) Performance of services or membership or fundraising solicitations Sharing of facilities, equipment, mailing lists, other assets, or paid employees 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. (c) Name of noncharitable exempt organization (b) Amount involved N/A 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described X No Yes in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? b If "Yes," complete the following schedule. (b) Type of organization (c) Description of relationship (a) Name of organization N/A Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, ration of preparer (other that taxpayer or fiduciary) is based on all information of which preparer has any knowledge Sign Here DIRECTOR Signature of officer or trustee Print/Type preparer's name Date Check [ PTIN Preparer's squature self-employed Paid LAURAN I. PENN Preparer Firm's name ► SNYDER COHN Firm's EIN ▶ **Use Only** 11200 ROCKVILLE 301-652-6700 Firm's address ► NORTH BETHESDA, MD 20852 Phone no.

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52-6659386

PAGE

Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase (a) List and describe the kind(s) of property sold, e.g., real estate, (c) Date acquired (d) Date sold 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) (mo., day, yr.) D - Donation 1a .649·1 SHS KINDER MORGAN MANAGEMENT LLC <u>03/14/06|02/25/10</u> P 11/25/8303/04/10 3,004 SHS BANK OF AMERICA 06/13/07|03/10/10 c 1,000 SHS ALLSTATE CORPORATION P d 3,300 P SHS JP MORGAN & CHASE CO 11/25/83|03/10/10 e 527 SHS KINDER MORGAN MANAGEMENT LLC P 03/14/06|03/16/10 .7945 SHS KINDER MORGAN MANAGEMENT LLC P 03/14/06|05/21/10 P 12/08/0407/26/10 240 SHS FRONTIER COMMUNICATIONS CORP P h 1,000 SHS RESEARCH MOTION LIMITED 12/22/08|08/16/10 P 03/14/08|08/24/10 .9808 SHS KINDER MORGAN MANAGEMENT LLC 50,000 SHS GREENBRIER COS CONV P 04/12/07|09/09/10 P 03/14/06|11/18/10 k .7118 SHS KINDER MORGAN MANAGEMENT LLC I CAPITAL GAINS DIVIDENDS m n 0 (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price plus expense of sale (e) plus (f) minus (g) (or allowable) 18. 40 22. a 49,205 1. 49,204. b 31,605. 051 61, <29,446.> C 142,292 8,255 134,037. d 30,858, 16,932. 13,926. е 25. 44. 19. f 2,508. ,782 g <726.> h 50,815 41,946. 8,869. 58. 30. 28. 43,000. 42,000. 1,000. 46. 22. 24. k 805. 805. m n 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (k) Excess of col. (i) (j) Adjusted basis (i) F.M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (j), if any 18. a 49,204. b <29,446.> C d 134,037. 13,926. 19<u>.</u> <726.> g h 8,869. 2<u>8.</u> 000. 24. k 805. 1 m n 0 If gain, also enter in Part I, line 7 Capital gain net income or (net capital loss) If (loss), enter "-0-" in Part I, line 7 2 <u>177,758.</u> 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 N/A

MARTHA & PHILIP SAGON FAMILY FOUNDATION

FORM 990-PF · INTEREST ON SAVI	NGS AND TEM	PORARY CASH I	NVESTMENTS	STATEMENT	1
SOURCE				AMOUNT	
M&T BANK	10,061.				
TOTAL TO FORM 990-PF, PART I,	LINE 3, CO	LUMN A	=	10,06	1. =
FORM 990-PF DIVIDENT	S AND INTER	EST FROM SECU	RITIES	STATEMENT	2
SOURCE	GROSS		PITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT	
M&T BANK	_	58,908.	805.	58,10	<u> </u>
TOTAL TO FM 990-PF, PART I, I	.N 4	58,908.	805.	58,10	3 <b>.</b>
FORM 990-PF	ACCOUNTI	NG FEES		STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOMI	(D) CHARITABI E PURPOSES	
ACCOUNTING FEES	2,300.	1,150.		1,150	0.
TO FORM 990-PF, PG 1, LN 16B	2,300.	1,150.		1,150	0 ·
FORM 990-PF	OTHER EXPENSES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM		
INVESTMENT ADVISORY MANAGEMENT FEES	9,089.	4,545.		4,54	4.
TO FORM 990-PF, PG 1, LN 23	9,089.	4,545.	-	4,54	4.

FORM 990-PF	CORPORATE STOCK		STATEMENT
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK		1,390,700.	1,532,430
TOTAL TO FORM 990-PF, PART	II, LINE 10B	1,390,700.	1,532,430
FORM 990-PF	CORPORATE BONDS		STATEMENT
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS		104,250.	161,726
TOTAL TO FORM 990-PF, PART	II, LINE 10C	104,250.	161,726