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

OMB No 1545-0052

**2010**Department of the Treasury  
Internal Revenue Service

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

For calendar year 2010, or tax year beginning JUL 1, 2010, and ending JUN 30, 2011

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return  
☐ Amended return ☐ Address change ☐ Name change

Name of foundation <b>BELLA &amp; SEYMOUR GOLDBERG FOUNDATION, INC. C/O RICHARD SHLANSKY-GOLDBERG</b>		A Employer identification number <b>13-6938293</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>325 MEADOW LANE</b>	Room/suite	B Telephone number <b>516-374-7000</b>
City or town, state, and ZIP code <b>MERION STATION, PA 19066-1330</b>		C If exemption application is pending, check here <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 1,435,543.</b> (Part I, column (d) must be on cash basis.)	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part II Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		13,038.	13,038.		STATEMENT 1
4 Dividends and interest from securities		15,421.	15,421.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		24,029.			
b Gross sales price for all assets on line 6a <b>431,331.</b>					
7 Capital gain net income (from Part IV, line 2)			24,029.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		52,488.	52,488.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 3		1,836.	1,836.		0.
c Other professional fees					
17 Interest					
18 Taxes STMT 4		992.	492.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 5		19,241.	18,991.		250.
24 Total operating and administrative expenses. Add lines 13 through 23		22,069.	21,319.		250.
25 Contributions, gifts, grants paid		52,267.			52,267.
26 Total expenses and disbursements. Add lines 24 and 25		74,336.	21,319.		52,517.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<21,848.>			
b Net investment income (if negative, enter -0-)			31,169.		
c Adjusted net income (if negative, enter -0-)				N/A	

**BELLA & SEYMOUR GOLDBERG FOUNDATION, INC.**

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<b>Part II Balance Sheets</b> <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	44,925.	3,672.	3,672.
	2 Savings and temporary cash investments	1,252,727.	94,390.	94,390.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
<b>Liabilities</b>	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other <span style="float:right">STMT 6</span>	0.	1,177,742.	1,337,481.
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 <b>Total assets</b> (to be completed by all filers)	1,297,652.	1,275,804.	1,435,543.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
<b>Net Assets or Fund Balances</b>	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 <b>Total liabilities</b> (add lines 17 through 22)	0.	0.	
<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/>	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	1,297,652.	1,275,804.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 <b>Total net assets or fund balances</b>	1,297,652.	1,275,804.	
31 <b>Total liabilities and net assets/fund balances</b>	1,297,652.	1,275,804.		

**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)	1,297,652.
2 Enter amount from Part I, line 27a	<21,848.>
3 Other increases not included in line 2 (itemize) ▶	0.
4 Add lines 1, 2, and 3	1,275,804.
5 Decreases not included in line 2 (itemize) ▶	0.
6 <b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30	1,275,804.

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**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a</b>			
<b>b</b> SEE ATTACHED STATEMENTS			
<b>c</b>			
<b>d</b>			
<b>e</b>			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b> 431,331.		407,302.	24,029.

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			24,029.

<b>2</b> Capital gain net income or (net capital loss)	2	24,029.
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	93,705.	1,330,021.	.070454
2008	48,325.	1,358,767.	.035565
2007	44,775.	871,538.	.051375
2006	62,054.	432,647.	.143429
2005	47,233.	207,693.	.227417

<b>2</b> Total of line 1, column (d)	2	.528240
<b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.105648
<b>4</b> Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	1,284,932.
<b>5</b> Multiply line 4 by line 3	5	135,750.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	6	312.
<b>7</b> Add lines 5 and 6	7	136,062.
<b>8</b> Enter qualifying distributions from Part XII, line 4 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.	8	52,517.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	623.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	623.
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	623.
6 Credits/Payments:			
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a	30.	
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	30.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	11.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	604.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

**Part VII-A Statements Regarding Activities**

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		<b>Yes</b>	<b>No</b>
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			<b>X</b>
c Did the foundation file Form 1120-POL for this year?			<b>X</b>
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		<b>X</b>
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		<b>X</b>
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		<b>X</b>
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		<b>X</b>
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	<b>X</b>	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV.	7	<b>X</b>	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> <u>NY</u>			
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	<b>X</b>	
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		<b>X</b>
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		<b>X</b>

N/A

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <b>N/A</b>	13	X	
14	The books are in care of <b>RICHARD SHLANSKY-GOLDBERG</b> Telephone no: <b>215-301-8400</b> Located at <b>325 MEADOW LANE, MERION STATION, PA</b> ZIP+4 <b>19066-1330</b>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country	16	Yes	No
				X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	
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?		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	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

Organizations relying on a current notice regarding disaster assistance check here

☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

X

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

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

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
PATTI SHLANSKY-GOLDBERG 325 MEADOW LANE MERION, PA 19096	DIRECTOR 1.00	0.	0.	0.
BELLA MINTZ GOLDBERG 11515 ST. MICHAELS AVENUE DALLAS, TX 75230	DIRECTOR 1.00	0.	0.	0.
RICHARD SHLANSKY-GOLDBERG 325 MEADOW LANE MERION, PA 19096	DIRECTOR 1.00	0.	0.	0.

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

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

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

0

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

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

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

	Expenses
1 N/A	
2	
3	
4	

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

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

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0.

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**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	1,229,163.
b	Average of monthly cash balances	1b	75,336.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,304,499.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,304,499.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	19,567.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,284,932.
6	Minimum investment return. Enter 5% of line 5	6	64,247.

**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	64,247.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	623.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	623.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	63,624.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	63,624.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	63,624.

**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	52,517.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	52,517.
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	52,517.

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

Form 990-PF (2010)

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

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				63,624.
2 Undistributed income, if any, as of the end of 2010			0.	
a Enter amount for 2009 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005	40,852.			
b From 2006	40,643.			
c From 2007	1,533.			
d From 2008				
e From 2009	27,674.			
f Total of lines 3a through e	110,702.			
4 Qualifying distributions for 2010 from Part XII, line 4. ▶ \$	52,517.			
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				52,517.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	11,107.			11,107.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	99,595.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	29,745.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	69,850.			
10 Analysis of line 9:				
a Excess from 2006	40,643.			
b Excess from 2007	1,533.			
c Excess from 2008				
d Excess from 2009	27,674.			
e Excess from 2010				

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)

**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 \_\_\_\_\_

[illegible]

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

## 1 Information Regarding Foundation Managers:

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

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 ☒ 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	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
Name and address (home or business)				
<b>a Paid during the year</b>				
SEE STATEMENT 7				
<b>Total</b>			<b>3a</b>	<b>52,267.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			<b>3b</b>	<b>0.</b>

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

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		Related or exempt function income
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments			14	13,038.		
4 Dividends and interest from securities			14	15,421.		
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	24,029.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a MISCELLANEOUS			01			
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)		0.		52,488.		0.
13 Total. Add line 12, columns (b), (d), and (e)						52,488.

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

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

[illegible]

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

- 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  
(2) Other assets

- b - Other transactions: -**

- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitations

- c Sharing of facilities, equipment, mailing lists, other assets, or paid employees**

- 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.

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

- 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 \_\_\_\_\_

~~DIRECTOR~~

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's signature

Date \_\_\_\_\_

Check ☐ self-employed

PTIN
------

**JAMES TOTO**

Firm's name ► **WEISERMAZARS LLP**

Firm's EIN ▶

Firm's address ► 399 THORNALL STREET  
EDISON, NJ 08837-2246

Phone no. 732 549-2800

Form **990-PF** (2010)

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	141 SHS ADOBE SYSTEMS	P	10/06/10	04/27/11
b	16 SHS AETNA INC	P	10/06/10	06/22/11
c	15 SHS AIR PROD & CHREM INC	P	10/06/10	03/01/11
d	6 SHS ALCON INC	P	10/06/10	04/12/11
e	72 SHS ALLEGHENY TECH INC	P	10/06/10	06/24/11
f	26 SHS ALLERGEN INC	P	10/06/10	05/24/11
g	42 SHS ALLIANZ SE ADS	P	10/06/10	03/09/11
h	9 SHS AMAZON INC COM	P	10/06/10	05/18/11
i	140 SHS AMERICAN TOWER CP CL A	P	10/06/10	04/06/11
j	67 SHS AMGEN INC	P	10/06/10	04/18/11
k	26 SHS BAKER HUGHES INC	P	10/06/10	03/01/11
l	28 SHS BIOGEN INC	P	10/06/10	04/21/11
m	30 SHS BOEING CO	P	10/06/10	06/23/11
n	40 SHS BORG WARNER	P	10/06/10	05/25/11
o	104 SHS CAMERON INTL CORP	P	10/06/10	06/01/11

(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 4,675.		3,837.	838.
b 638.		487.	151.
c 1,352.		1,264.	88.
d 1,023.		1,004.	19.
e 4,760.		3,422.	1,338.
f 2,154.		1,732.	422.
g 606.		495.	111.
h 1,675.		1,408.	267.
i 7,144.		7,119.	25.
j 3,643.		3,714.	<71.>
k 1,733.		1,145.	588.
l 2,304.		1,589.	715.
m 2,118.		2,060.	58.
n 2,776.		2,077.	699.
o 4,984.		4,534.	450.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			838.
b			151.
c			88.
d			19.
e			1,338.
f			422.
g			111.
h			267.
i			25.
j			<71.>
k			588.
l			715.
m			58.
n			699.
o			450.

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). If (loss), enter "-0-" in Part I, line 8	}	3

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	42 SHS CANADIAN NATURAL RESOURCES LTD	P	10/06/10	05/12/11
b	41 SHS CATERPILLAR INC	P	10/06/10	06/13/11
c	85 SHS CELGENE CORP	P	11/01/10	02/08/11
d	59 SHE CHECKPOINT SOFTWARE TECH LTD	P	10/06/10	06/22/11
e	96 SHS CHEVRON CORP	P	10/06/10	05/09/11
f	174 SHS CISCO SYS INC	P	10/06/10	02/11/11
g	38 SHS CITRIX SYSTEMS INC	P	10/06/10	06/17/11
h	131 SHS COCA COLA INC	P	10/06/10	05/09/11
i	22 SHS COGNIZANT TECH SOLUTIONS	P	03/22/11	06/14/11
j	41 SHS COLGATE PALMOLIVE CO	P	10/06/10	03/18/11
k	8 SHS CON-WAY INC	P	02/03/11	06/22/11
l	231 SHS CORNING	P	10/06/10	05/20/11
m	66 SHS CTRIP.COM INTL LTD	P	11/22/10	02/15/11
n	34 SHS CUMMINS INC	P	10/06/10	05/20/11
o	78 SHS DANAHER CORP	P	10/06/10	01/26/11

(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 1,771.		1,572.	199.
b 4,312.		3,242.	1,070.
c 4,326.		4,995.	<669.>
d 3,181.		2,182.	999.
e 10,009.		8,047.	1,962.
f 3,269.		3,865.	<596.>
g 2,982.		2,391.	591.
h 8,599.		7,789.	810.
i 1,555.		1,688.	<133.>
j 3,182.		3,037.	145.
k 304.		268.	36.
l 4,576.		4,180.	396.
m 2,717.		3,127.	<410.>
n 5,007.		4,281.	726.
o 3,705.		3,186.	519.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			199.
b			1,070.
c			<669.>
d			999.
e			1,962.
f			<596.>
g			591.
h			810.
i			<133.>
j			145.
k			36.
l			396.
m			<410.>
n			726.
o			519.

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). If (loss), enter "-0-" in Part I, line 8	}	3



**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	88 SHS DENBURY RESOURCES INC NEW	P	10/06/10	04/28/11
b	38 SHS DEVON ENERGY CORP NEW	P	03/09/11	06/24/11
c	6 SHS DRESSER-RAND GROUP INC	P	11/03/10	03/14/11
d	16 SHS DUN & BRADSTREET CP NEW	P	10/06/10	03/02/11
e	53 SHS EMC CORP MASS	P	10/06/10	06/13/11
f	67 SHS EMERSON ELECTRIC CO	P	10/06/10	05/13/11
g	8 SHS EOG RESOURCE INC	P	10/14/10	05/24/11
h	32 SHS FIRST SOLAR INC	P	03/31/11	06/24/11
i	40 SHS FLOWSERVE CORP	P	03/04/11	06/14/11
j	546.93 SHS FNMA POOL AD3808 41/2 4-1-40	P	10/14/10	06/25/11
k	192.64 SHS FNMA POOL MA0583 4 12-01-40	P	12/13/10	06/25/11
l	762.54 SHS FNMA POOL 725027 5 11-01-33	P	10/14/10	06/25/11
m	1157.91 SHS FNMA POOL 888129 51/2 02-01-37	P	10/14/10	06/25/11
n	1791.13 SHS FNMA POOL 889579 6 5-01-38	P	10/21/10	06/25/11
o	603.51 SHS FNMA POOL 931195 41/2 05-01-24	P	10/14/10	06/25/11

(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 1,908.		1,509.	399.
b 2,915.		3,435.	<520.>
c 303.		216.	87.
d 1,296.		1,203.	93.
e 1,398.		1,048.	350.
f 3,634.		3,596.	38.
g 854.		792.	62.
h 3,779.		5,029.	<1,250.>
i 4,416.		5,123.	<707.>
j 547.		577.	<30.>
k 193.		192.	1.
l 763.		820.	<57.>
m 1,158.		1,249.	<91.>
n 543.		593.	<50.>
o 604.		643.	<39.>

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			399.
b			<520.>
c			87.
d			93.
e			350.
f			38.
g			62.
h			<1,250.>
i			<707.>
j			<30.>
k			1.
l			<57.>
m			<91.>
n			<50.>
o			<39.>

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 }

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

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	891.58 SHS FNMA POOL 995265 51/2 1-01-24	P	10/14/10	06/25/11
b	94 SHS FREEPORT MCMORAN CP & GLD	P	10/06/10	06/23/11
c	19 SHS F5 NETWORK INC	P	10/06/10	03/22/11
d	47 SHS GAZPROM O A O SPON ADR	P	10/06/10	01/31/11
e	25 SHS GENUINE PARTS CO	P	10/06/10	06/23/11
f	22 SHS GENZYME CORP	P	10/06/10	04/05/11
g	143 SHS HCP INC	P	10/06/10	05/09/11
h	108 SHS HEWLETT PACKARD	P	02/08/11	06/22/11
i	71 SHS HOLOGIC INC	P	10/06/10	03/14/11
j	110 SHS HOSPITALITY PPTYS TR COM SBI	P	10/06/10	06/09/11
k	7 SHS INTL FLAVORS & FRAGRANCES	P	10/06/10	01/07/11
l	80 SHS JP MORGAN CHASE & CO.	P	10/06/10	06/23/11
m	33 SHS KROGER CO	P	10/06/10	03/15/11
n	43 SHS LABORATORY CP AMER HLDGS NEW	P	10/06/10	05/06/11
o	57 SHS LOGITECH INTL SA	P	10/06/10	06/14/11

(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 892.		964.	<72.>
b 4,616.		4,424.	192.
c 1,823.		1,933.	<110.>
d 1,242.		1,032.	210.
e 1,295.		1,119.	176.
f 1,679.		1,578.	101.
g 5,359.		5,159.	200.
h 3,799.		5,202.	<1,403.>
i 1,434.		1,136.	298.
j 2,458.		2,450.	8.
k 391.		347.	44.
l 3,191.		3,196.	<5.>
m 783.		703.	80.
n 3,934.		3,408.	526.
o 685.		992.	<307.>

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<72.>
b			192.
c			<110.>
d			210.
e			176.
f			101.
g			200.
h			<1,403.>
i			298.
j			8.
k			44.
l			<5.>
m			80.
n			526.
o			<307.>

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 }

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

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	46 SHS LVMH MOET HENNESSEY LOUIS VUITT	P	10/06/10	01/28/11
b	10 SHS MARSH & MCLENNAN COS INC	P	10/06/10	01/07/11
c	151 SHS MC DONALDS CORP	P	10/06/10	01/12/11
d	30 SHS MOTOROLA SOLUTIONS INC	P	10/06/10	06/22/11
e	79 SHS NATIONWIDE HLTH PROPERTIES	P	10/06/10	03/03/11
f	86 SHS NETAPP INC COM	P	10/06/10	04/06/11
g	16 SHS NETFLIX INC	P	10/06/10	06/16/11
h	82 SHS NORDSTROM INC	P	10/06/10	06/27/11
i	.536 SHS NOVARTIS AG ADR	P	04/12/11	04/12/11
j	10 SHS NOVA NOVARTIS A/S ADR	P	10/06/10	02/03/11
k	258 SHS NVIDIA CORP	P	01/07/11	03/11/11
l	62 SHS ORACLE CORP	P	10/06/10	05/23/11
m	19 SHS PARKER HANNIFIN CORP	P	10/06/10	05/20/11
n	44 SHS PHARMACEUTICAL PROD DEV INC	P	10/06/10	02/25/11
o	58 SHS PITNEY BOWES	P	10/06/10	05/09/11

(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 1,440.		1,403.	37.
b 270.		238.	32.
c 11,242.		11,425.	<183.>
d 1,336.		1,048.	288.
e 3,213.		3,156.	57.
f 3,996.		4,216.	<220.>
g 6,073.		3,940.	2,133.
h 3,747.		3,067.	680.
i 30.		30.	0.
j 1,112.		995.	117.
k 5,266.		4,891.	375.
l 2,064.		1,712.	352.
m 1,652.		1,341.	311.
n 1,224.		1,103.	121.
o 1,448.		1,262.	186.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			37.
b			32.
c			<183.>
d			288.
e			57.
f			<220.>
g			2,133.
h			680.
i			0.
j			117.
k			375.
l			352.
m			311.
n			121.
o			186.

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 }

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

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	37 SHS POTASH CP OF SASKATCHEWAN INC	P	11/14/10	05/12/11
b	8 SHS PRECISION CASTPARTS CORP	P	10/06/10	03/21/11
c	14 SHS PRICEDLINE.COM	P	10/06/10	02/24/11
d	11 SHS QUEST DIAGNOSTICS	P	10/06/10	06/22/11
e	19 SHS RANGE RESOURCES CORP	P	10/06/10	05/18/11
f	11 SHS ROCKWELL AUTOMATION INC	P	02/10/11	06/15/11
g	39 SHS ROCKWELL COLLINS INC	P	10/06/11	03/23/11
h	16 SHS SALESFORCE.COM INC	P	10/06/10	05/24/11
i	83 SHS SANDISK CORP	P	02/15/11	06/24/11
j	22 SHS SANOFI CVR RTS 123120	P	04/15/11	05/04/11
k	78 SHS SCANA CORP NEW	P	10/06/10	06/10/11
l	12 SHS SCHLUMBERGER LTD	P	10/06/10	05/11/11
m	61 SHS SEALED AIR CP NEW	P	10/06/10	05/20/11
n	123 SHS SENIOR HSG PPTY TR SBI	P	10/06/10	06/10/11
o	3 SHS SIGMA ALDRICH CORP DEL	P	10/06/10	06/22/11

(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 1,945.		1,725.	220.
b 1,148.		1,049.	99.
c 6,285.		4,668.	1,617.
d 668.		556.	112.
e 994.		723.	271.
f 869.		950.	<81.>
g 2,475.		2,308.	167.
h 2,287.		1,648.	639.
i 3,328.		4,054.	<726.>
j 55.		51.	4.
k 3,047.		3,161.	<114.>
l 987.		760.	227.
m 1,613.		1,387.	226.
n 2,813.		2,958.	<145.>
o 207.		185.	22.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			220.
b			99.
c			1,617.
d			112.
e			271.
f			<81.>
g			167.
h			639.
i			<726.>
j			4.
k			<114.>
l			227.
m			226.
n			<145.>
o			22.

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 }

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

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	12 SHS SINA.COM	P	01/12/11	06/09/11
b	63 SHS SOUTHWESTERN ENERGY COMPANY	P	10/06/10	02/08/11
c	69 SHS STARBUCKS CORP WASHINGTON	P	10/06/10	05/18/11
d	14 SHS STARWOOD HTLS & RSTS WW INC	P	01/26/11	05/18/11
e	118 SHS SYMANTEC CORP	P	10/06/10	05/13/11
f	96 SHS TAWAIN SMCNDCTR MFG-CO-LTD ADR	P	10/06/10	05/18/11
g	81 SHS TARGET CORPORATION	P	10/06/10	03/04/11
h	26 SHS TECHNE CP	P	10/06/10	05/23/11
i	35 SHS TESCO PLC SPONSORED ADR	P	10/06/10	03/28/11
j	105 SHS TEXAS INSTRUMENTS	P	10/06/10	02/08/11
k	198 SHS TEXTRON INC	P	04/27/11	05/31/11
l	8 SHS TYCO INTERNATIONAL LTD NEW	P	10/06/10	02/01/11
m	11 UGI CORPORATION NEW COM	P	10/06/10	01/10/11
n	29 SHS UNITEDHEALTH GP INC	P	10/06/10	05/19/11
o	5000 SHS US TSY NOTE 51/8 6-30-11	P	10/06/10	06/28/11

(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 1,087.		984.	103.
b 2,438.		2,122.	316.
c 2,395.		1,804.	591.
d 802.		868.	<66.>
e 2,236.		1,747.	489.
f 1,300.		989.	311.
g 4,169.		4,365.	<196.>
h 2,043.		1,626.	417.
i 650.		740.	<90.>
j 3,694.		2,937.	757.
k 4,559.		5,237.	<678.>
l 361.		301.	60.
m 351.		319.	32.
n 1,470.		993.	477.
o 5,000.		5,000.	0.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			103.
b			316.
c			591.
d			<66.>
e			489.
f			311.
g			<196.>
h			417.
i			<90.>
j			757.
k			<678.>
l			60.
m			32.
n			477.
o			0.

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). If (loss), enter "-0-" in Part I, line 8 }	3	

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	30 SHS VALERO ENERGY CP DELA NEW	P	10/06/10	03/01/11
b	57 SHS VCA ANTECH INC	P	11/03/10	05/18/11
c	52 SHS VISA INC CL A	P	10/06/10	01/12/11
d	31 SHS WAL-MART DE MEXICO SA SPON ADR	P	10/06/10	03/30/11
e	21 SHS WATER CORP	P	10/06/10	06/14/11
f	72 SHS WILLIAMS CO INC	P	10/06/10	05/20/11
g	13 SHS WISCONSIN ENERGY CORP	P	10/06/10	05/06/11
h	8 SHS WPP PLC ADR	P	10/06/10	03/10/11
i	34 SHS ZIMMER HLDGS INC	P	10/06/10	05/20/11
j	35 SHS 3M COMPANY	P	10/06/10	01/31/11
k	MSSB 63048	P	10/06/10	12/25/10
l	50000 SHS SLM CORP SER A	P	10/06/10	06/09/11
m	50000 SHS BAC CAP TR XIV	P	10/05/10	03/30/11
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 781.		529.	252.
b 1,435.		1,187.	248.
c 3,767.		3,860.	<93.>
d 909.		804.	105.
e 1,912.		1,485.	427.
f 2,199.		1,379.	820.
g 542.		523.	19.
h 506.		447.	59.
i 2,212.		1,772.	440.
j 3,071.		3,140.	<69.>
k 62,773.		63,092.	<319.>
l 48,869.		46,256.	2,613.
m 37,994.		37,381.	613.
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			252.
b			248.
c			<93.>
d			105.
e			427.
f			820.
g			19.
h			59.
i			440.
j			<69.>
k			<319.>
l			2,613.
m			613.
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	24,029.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

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

SOURCE	AMOUNT
BANK OF AMERICA	1,448.
MORGAN STANLEY SMITH BARNEY 62712	8,640.
MORGAN STANLEY SMITH BARNEY 63048	2,950.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	13,038.

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

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
MORGAN STANLEY SMITH BARNEY 62712	247.	0.	247.
MORGAN STANLEY SMITH BARNEY 63048	15,174.	0.	15,174.
TOTAL TO FM 990-PF, PART I, LN 4	15,421.	0.	15,421.

## FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	1,836.	1,836.		0.
TO FORM 990-PF, PG 1, LN 16B	1,836.	1,836.		0.

## FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL TAX YEAR END 6/30/10	500.	0.		0.
FOREIGN TAX PAID	492.	492.		0.
TO FORM 990-PF, PG 1, LN 18	992.	492.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ANNUAL NY FILING FEE	250.	0.		250.
ACCRUED INTEREST PAID	3,388.	3,388.		0.
INVESTMENT ADVISORY FEES	15,583.	15,583.		0.
BANK FEES	20.	20.		0.
TO FORM 990-PF, PG 1, LN 23	19,241.	18,991.		250.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	6
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS-MORGAN STANLEY SMITH BARNEY	COST	1,177,742.	1,337,481.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,177,742.	1,337,481.



FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 7

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
VARIOUS QUALIFIED ORGANIZATIONS LESS THAN \$5,000 325 MEADOW LANE MERION STA, PA 19066	NONE GENERAL CONTRIBUTION	PUBLIC CHARITY	6,917.
JEWISH FEDERATION OF GREATER PHILADELPHIA ARCH STREET PHILADELPHIA , PA 19103	NONE GENERAL CONTRIBUTION	PUBLIC CHARITY	5,000.
AMERICAN JEWISH COMMITTEE 235 MAIN STREET STE 314 WHITE PLAINS, NY 10591	NONE GENERAL CONTRIBUTION	PUBLIC CHARITY	2,500.
PENN'S WAY SCHOOL OF MED 3451 WALNUT STREET PHILADELPHIA, PA 19104	NONE GENERAL CONTRIBUTION	PUBLIC CHARITY	6,000.
MAINE LINE REFORM TEMPLE 410 MONTGOMERY AVENUE WYNNEWOOD , PA 19096	NONE GENERAL CONTRIBUTION	PUBLIC CHARITY	8,000.
JEWISH FEDERATION OF GREATER TEXAS 7800 NORTHAVEN ROAD DALLAS, TX 75230	NONE GENERAL CONTRIBUTION	PUBLIC CHARITY	9,100.
UNIVERSITY OF ROCHESTER 601 ELMWOOD AVENUE ROCHESTER, NY 14642	NONE GENERAL CONTRIBUTION	PUBLIC CHARITY	6,000.
BALDWIN SCHOOL 701 W. MONTGOMERY AVENUE BRYN MAWR, PA 19010	NONE GENERAL CONTRIBUTION	PUBLIC CHARITY	6,250.

BELLA & SEYMOUR GOLDBERG FOUNDATION, INC.

13-6938293

PARKSIDE SCHOOL

NONE  
GENERAL CONTRIBUTION

PUBLIC  
CHARITY

2,500.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

52,267.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**
- Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

<b>Part II</b>		<b>Additional (Not Automatic) 3-Month Extension of Time.</b> Only file the original (no copies needed).	
Type or print  File by the extended - due date for filing your return. See instructions.	Name of exempt organization <b>BELLA &amp; SEYMOUR GOLDBERG FOUNDATION, INC. C/O RICHARD SHLANSKY-GOLDBERG</b>		Employer identification number <b>13-6938293</b>
	Number, street, and room or suite no. If a P.O. box, see instructions <b>325 MEADOW LANE</b>		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>MERION STATION, PA 19066-1330</b>		

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

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

- The books are in the care of **325 MEADOW LANE - MERION STATION, PA 19066-1330**  
Telephone No **215-301-8400** FAX No.
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.
- 4 I request an additional 3-month extension of time until **MAY 15, 2012**
- 5 For calendar year , or other tax year beginning **JUL 1, 2010**, and ending **JUN 30, 2011**
- 6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return  
☐ Change in accounting period
- 7 State in detail why you need the extension  
**INFORMATION NECESSARY TO PREPARE A COMPLETE AND ACCURATE TAX RETURN IS MISSING. THEREFORE, ADDITIONAL TIME TO FILE IS BEING REQUESTED.**

<b>8a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>8a</b>	\$	0.
<b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	<b>8b</b>	\$	30.
<b>c</b> <b>Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>8c</b>	\$	0.

**Signature and Verification**

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

Signature Title **DIRECTOR**Date 

Form 8868 (Rev. 1-2011)