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Department of the Treasury
Internal Revenue ServiceReturn of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

OMB No 1545-0052

2010

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 DEC 1, 2010, and ending NOV 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 BERNARD & SARAH GEWIRZ FOUNDATION		A Employer identification number 52-1381689
Number and street (or P.O. box number if mail is not delivered to street address) 1666 K STREET, NW	Room/suite 430	B Telephone number 202-296-7311
City or town, state, and ZIP code WASHINGTON, DC 20006		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) \$ 4,156,545. (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 I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	80,000.		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	6,665.	6,665.		Statement 1
	4 Dividends and interest from securities	4,066.	4,066.		Statement 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-112.			
	b Gross sales price for all assets on line 6a	400,000.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	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	463,920.	463,920.		Statement 3	
12 Total Add lines 1 through 11	554,539.	474,651.			
Operating and Administrative Expenses	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				
	c Other professional fees				
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses Stmt 4	1,389.	0.		0.
	24 Total operating and administrative expenses. Add lines 13 through 23	1,389.	0.		0.
	25 Contributions, gifts, grants paid	570,489.			570,489.
26 Total expenses and disbursements. Add lines 24 and 25	571,878.	0.		570,489.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-17,339.				
b Net investment income (if negative, enter -0-)		474,651.			
c Adjusted net income (if negative, enter -0-)			N/A		

2010-07-10

LHA For Paperwork Reduction Act Notice, see the instructions.

Form 990-PF (2010)

Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	30,349.	41,778.	41,778.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶	41,256.	0.	0.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations Stmt 5	400,876.	404,767.	404,767.
	b Investments - corporate stock			
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other Stmt 6	3,166,321.	3,174,918.	3,710,000.
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	3,638,802.	3,621,463.	4,156,545.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	0.	0.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	3,638,802.	3,621,463.		
30 Total net assets or fund balances	3,638,802.	3,621,463.		
31 Total liabilities and net assets/fund balances	3,638,802.	3,621,463.		

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	3,638,802.
2 Enter amount from Part I, line 27a	2	-17,339.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	3,621,463.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	3,621,463.

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 FROM PARTNERSHIPS	P		
b FEDERAL HOME LOAN	P	08/10/10	08/26/11
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a		110.	-110.
b 400,000.		400,002.	-2.
c			
d			
e			

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			-110.
b			-2.
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	-112.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	532,856.	4,085,587.	.130423
2008	519,938.	4,200,808.	.123771
2007	472,271.	3,928,684.	.120211
2006	521,085.	4,420,289.	.117885
2005	478,784.	4,280,209.	.111860
2 Total of line 1, column (d)			.604150
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			.120830
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5			4,196,501.
5 Multiply line 4 by line 3			507,063.
6 Enter 1% of net investment income (1% of Part I, line 27b)			4,747.
7 Add lines 5 and 6			511,810.
8 Enter qualifying distributions from Part XII, line 4			570,489.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	4,747.
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	4,747.
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	4,747.
6 Credits/Payments:			
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a	4,791.	
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	4,791.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	44.	
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax <input checked="" type="checkbox"/> 44. Refunded <input checked="" type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b 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		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" 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 checked="" 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.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/>		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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 ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>SARAH GEWIRZ</u> Telephone no. ► <u>202-296-7311</u> Located at ► <u>1666 K STREET, NW SUITE 430, WASHINGTON, DC</u> ZIP+4 ► <u>20006</u>			
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 <input type="checkbox"/> N/A <input checked="" type="checkbox"/>	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ►		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) <input type="checkbox"/> N/A <input checked="" type="checkbox"/>	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <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.) <input type="checkbox"/> N/A <input checked="" type="checkbox"/>	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b	X

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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?

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

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 7		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 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	0.
b	Average of monthly cash balances	1b	145,640.
c	Fair market value of all other assets	1c	4,114,767.
d	Total (add lines 1a, b, and c)	1d	4,260,407.
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	4,260,407.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	63,906.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,196,501.
6	Minimum investment return. Enter 5% of line 5	6	209,825.

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	209,825.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	4,747.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	4,747.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	205,078.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	205,078.
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	205,078.

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	570,489.
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	570,489.
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	4,747.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	565,742.

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.

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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				205,078.
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	275,274.			
b From 2006	312,573.			
c From 2007	290,327.			
d From 2008	309,898.			
e From 2009	334,195.			
f Total of lines 3a through e	1,522,267.			
4 Qualifying distributions for 2010 from Part XII, line 4: ► \$	570,489.			
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				205,078.
e Remaining amount distributed out of corpus	365,411.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1,887,678.			
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	275,274.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	1,612,404.			
10 Analysis of line 9:				
a Excess from 2006	312,573.			
b Excess from 2007	290,327.			
c Excess from 2008	309,898.			
d Excess from 2009	334,195.			
e Excess from 2010	365,411.			

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED SCHEDULE	NONE	CHARITABLE ORGANIZATI	CHARITABLE	570,489.
Total			▶ 3a	570,489.
b Approved for future payment None				
Total			▶ 3b	0.

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | Yes | No |
|----------|--|--------------|----------|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[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 _____

OFFICER

Title

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ if
self-employed

PTIN	
------	--

John T. Barkanic,
CPA

MES, L.L.C.

3/12/12

40000876

**Paid
Preparer
Use Only**

Firm's name ► **BARKANIC & AMES, L.L.C.**

Firm's EIN ▶

Firm's address ► 15825 SHADY GROVE ROAD, SUITE 130
ROCKVILLE, MD 20850

Phone no. 301-330-6664

Form **990-PF** (2010)

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	Amount
HOSKINSON NOTE	2,475.
PARTNERSHIPS	4,190.
Total to Form 990-PF, Part I, line 3, Column A	6,665.

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
PARTNERSHIPS	64.	0.	64.
PERSHING LLC	4,002.	0.	4,002.
Total to Fm 990-PF, Part I, ln 4	4,066.	0.	4,066.

Form 990-PF Other Income Statement 3

Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
PARTNERSHIP INCOME	463,920.	463,920.	
Total to Form 990-PF, Part I, line 11	463,920.	463,920.	

Form 990-PF Other Expenses Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
BANK SERVICE CHARGES	111.	0.		0.
PARTNERSHIP EXPENSE	65.	0.		0.
PROFESSIONAL FEES	1,213.	0.		0.
To Form 990-PF, Pg 1, ln 23	1,389.	0.		0.

Form 990-PF	U.S. and State/City Government Obligations	Statement	5
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Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value
M&T SECURITIES	X		404,767.	404,767.
Total U.S. Government Obligations			404,767.	404,767.
Total State and Municipal Government Obligations				
Total to Form 990-PF, Part II, line 10a			404,767.	404,767.

Form 990-PF	Other Investments	Statement	6
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Description	Valuation Method	Book Value	Fair Market Value
1620 K STREET	COST	1,961,965.	2,000,000.
DORCHESTER HOUSE	COST	267,088.	700,000.
DORCHESTER JV	COST	110,424.	10,000.
HOME PROPERTIES	COST	655,485.	800,000.
KALORAMA WEST LLC	COST	179,956.	200,000.
Total to Form 990-PF, Part II, line 13		3,174,918.	3,710,000.

Form 990-PF	Part VIII - List of Officers, Directors Trustees and Foundation Managers	Statement 7
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Name and Address	Title and Avrg Hrs/Wk	Compen- sation	Employee Ben Plan Contrib	Expense Account
BERNARD S. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	PRESIDENT 8.00	0.	0.	0.
SARAH M. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIR/SECY 8.00	0.	0.	0.
MICHAEL K. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIR/VP 1.00	0.	0.	0.
JONATHAN K. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIRECTOR 1.00	0.	0.	0.
STEVEN B. GEWIRZ 1666 K STREET, NW, SUITE 430 WASHINGTON, DC 20006	DIRECTOR 1.00	0.	0.	0.
Totals included on 990-PF, Page 6, Part VIII		0.	0.	0.

Form 990-PF	Grant Application Submission Information	Statement	8
	Part XV, Lines 2a through 2d		

Name and Address of Person to Whom Applications Should be Submitted

BERNARD S. GEWIRZ
1666 K ST., NW, #430
WASHINGTON, DC 20006

Telephone Number

202-296-7311

Form and Content of Applications

NO SPECIFIC FORM REQUIRED. APPLICATIONS SHOULD INCLUDE NAME, ADDRESS AND INFORMATION REGARDING CHARITABLE PURPOSE AND STATUS AS EXEMPT ORGANIZATION.

Any Submission Deadlines

NONE

Restrictions and Limitations on Awards

NONE

6.15 PM

03/07/12

Accrual Basis

Bernard & Sarah Gewirz Foundation

Transaction Detail By Account

December 2010 through November 2011

Type	Date	Num	Name	Debit	Credit	Balance
Donation						
Check	12/08/2010	5691	Preservation Society of Newport County	5,038 00		5,038 00
Check	12/08/2010	5692	Hebrew Home of Greater Washington	2,000 00		7,038 00
Check	12/08/2010	5693	American Jewish Community	1,000 00		8,038 00
Check	12/08/2010	5694	George Washington Institute	1,000 00		9,038 00
Check	12/15/2010	5696	Rhode Island Arts Foundation at Newport	600 00		9,638 00
Check	12/15/2010	5697	Newport Performing Arts Center	500 00		10,138 00
Check	12/15/2010	5698	Redwood Library	100 00		10,238 00
Check	12/15/2010	5699	Freinds of the Jewish Chapel	100 00		10,338 00
Check	12/23/2010	5700	Jewish Social Service Agency	200 00		10,538 00
Check	12/23/2010	5701	The Friendship Circle	100 00		10,638 00
Check	01/26/2011	5702	Childrens Hospital Foundation	1,000 00		11,638 00
Check	01/26/2011	5703	Palm Beach Council of the Firefighters	50 00		11,688 00
Check	01/27/2011	5704	Washington DC SCC	2,500 00		14,188 00
Check	02/03/2011	5705	Focus	1,000 00		15,188 00
Check	02/04/2011	5706	National Cathedral School	10,000 00		25,188 00
Check	02/11/2011	5707	Hallel	1,000 00		26,188 00
Check	02/11/2011	5708	U S Holocaust Memorial Museum	500 00		26,688 00
Check	02/11/2011	5709	Susan B Komen Cancer Foundation	2,500 00		29,188 00
Check	02/14/2011	5710	Island Moving Co	1,000 00		30,188 00
Check	02/18/2011	5711	New York - Yrenby	500 00		30,688 00
Check	03/02/2011	5712	John F Kennedy Center for the Arts	50,000 00		80,688 00
Check	03/02/2011	5713	Landon School Annual Fund	10,000 00		90,688 00
Check	03/02/2011	5714	Levine School of Music	1,000 00		91,688 00
Check	03/05/2011	5715	Preservation Society of Newport County	5,000 00		96,688 00
Check	03/10/2011	5716	Newport Hospital Foundation	5,000 00		101,688 00
Check	03/17/2011	5717	U S Holocaust Memorial Museum	1,000 00		102,688 00
Check	03/24/2011	5718	Salve Regina University	2,000 00		104,688 00
Check	03/28/2011	5719	Palm Beach Fellowship	100 00		104,788 00
Check	03/28/2011	5720	MacArthur Beautification Group	100 00		104,888 00
Check	03/28/2011	5721	United States Navy Memorial Foundation	100 00		104,988 00
Check	04/01/2011	5722	Redwood Library	10,000 00		114,988 00
Check	04/01/2011	5723	George Washington University	25,000 00		139,988 00
Check	04/01/2011	5724	Agavidurch Lang Irvet	1,000 00		140,988 00
Check	04/12/2011	5727	Newport Music Festival	600 00		141,588 00
Check	04/13/2011	5725	Preservation Society of Newport County	4,500 00		146,088 00
Check	04/13/2011	5726	Landon School Annual Fund	300 00		146,388 00
Check	04/14/2011	5729	Refugee's International	1,250 00		147,638 00
Check	04/14/2011	5728	Childrens Hospital Foundation	1,000 00		148,638 00
Check	04/14/2011	5730	Georgetown Univ Partners in Research	1,000 00		149,638 00
Check	04/19/2011	5731	Newport Antiques Show	5,000 00		154,638 00
Check	05/02/2011	5732	Cure Autism Now	1,000 00		155,638 00
Check	05/05/2011	5733	Preservation Society of Newport County	1,000 00		156,638 00
Check	05/08/2011	5734	Friends of Ballard Park	500 00		157,138 00
Check	05/08/2011	5735	Palm Beach Civic Assoc	500 00		157,638 00
Check	05/12/2011	5736	The Heritage Foundation	200 00		157,838 00
Check	05/19/2011	5737	Newport Historical Society	1,000 00		158,838 00
Check	05/20/2011	5738	Aquidneck Island Land Trust	1,000 00		159,838 00
Check	05/26/2011	5739	PANCAM	1,000 00		160,838 00
Check	06/08/2011	5740	Save a Child Heart Foundation	250 00		161,088 00
Check	06/08/2011	5741	Jewish Historical Society	1,000 00		162,088 00
Check	06/08/2011	5742	Operation Understanding	100 00		162,188 00
Check	06/08/2011	5743	The Potter League for Animals	300 00		162,488 00
Check	06/10/2011	5744	Redwood Library	5,000 00		167,488 00
Check	06/10/2011	5745	Adas Israel Congregation	10,000 00		177,488 00
Check	06/12/2011	5746	Sibley Hospital	5,000 00		182,488 00
Check	06/21/2011	5747	Garden of Remembrance Memorial Park	12,700 00		195,188 00
Check	06/21/2011	5748	Newport Film	1,000 00		196,188 00
Check	06/22/2011	5749	Preservation Society of Newport County	5,000 00		201,188 00
Check	06/22/2011	5750	Sixth & J Historic Synagogue	1,000 00		202,188 00
Check	07/06/2011	5751	Hope Friends for Cancer Research	500 00		202,688 00
Check	07/06/2011	5752	Preservation Society of Newport County	8,000 00		210,688 00
Check	07/14/2011	5753	Bnai Brith Foundation	118 00		210,806 00
Check	07/15/2011	5754	Congregation Emanuel	500 00		211,306 00
Check	07/19/2011	5755	Newport Art Museum	25,000 00		236,306 00
Check	07/19/2011	5756	Preservation Society of Newport County	2,000 00		238,306 00
Check	07/23/2011	5758	Star Kids Schlorship Foundation	300 00		238,606 00
Check	07/23/2011	5759	Kennedy Center	11,000 00		249,606 00
Check	07/23/2011	5760	Newport Hospital Foundation	2,500 00		252,106 00
Check	07/29/2011	5761	Save the Bay	500 00		252,606 00
Check	08/03/2011	5762	Palm Beach Country Club Foundation	1,000 00		253,606 00
Check	08/08/2011	5763	Blethewold	1,500 00		255,106 00

Bernard & Sarah Gewirz Foundation
Transaction Detail By Account
December 2010 through November 2011

Type	Date	Num	Name	Debit	Credit	Balance
Check	08/08/2011	5764	Touro Synagogue Foundation	10,000 00		265,106 00
Check	08/14/2011	5765	Redwood Library	1,000 00		266,106 00
Check	08/18/2011	5766	Redwood Library	150 00		266,256 00
Check	09/07/2011	5767	Boys and Girls Club of Greater Washingt	500 00		266,756 00
Check	09/17/2011	5768	Friends of John Hopkins Medicine	1,000 00		267,756 00
Check	09/17/2011	5769	St Andrews School	1,000 00		268,756 00
Check	09/17/2011	5770	Sibley Memorial Hosp Foundation	1,000 00		269,756 00
Check	10/02/2011	5771	Hebrew Home of Greater Washington	2,000 00		271,756 00
Check	10/02/2011	5772	Adas Israel Congregation	54 00		271,810 00
Check	10/10/2011	5773	Preservation Society of Newport County	5,984 75		277,794 75
Check	10/10/2011	5774	Garden of Remembrance Memorial Park	22,000 00		299,794 75
Check	10/10/2011	5775	Kravis Center for the Performing Arts	1,000 00		300,794 75
Check	10/17/2011	5777	Friendship Circle	500 00		301,294 75
Check	10/17/2011	5778	Interfaith Conference	200 00		301,494 75
Check	10/17/2011	5779	American Heart Association	500 00		301,994 75
Check	10/17/2011	5780	Mercersburg Academy	500 00		302,494 75
Check	10/24/2011	5781	Landon School Annual Fund	1,500 00		303,994 75
Check	11/08/2011	5782	Jewish Endowment Fund	25,000 00		328,994 75
Check	11/08/2011	5783	Georgetown Medical Center	135,000 00		463,994 75
Check	11/08/2011	5784	United Way of Palm Beach	25,000 00		488,994 75
Check	11/08/2011	5785	National Cathedral School	10,000 00		498,994 75
Check	11/08/2011	5786	St Alban's School	2,500 00		501,494 75
Check	11/08/2011	5787	United Way of Rhode Island	17,500 00		518,994 75
Check	11/08/2011	5788	Preservation Society of Newport County	20,000 00		538,994 75
Check	11/08/2011	5789	The Washington Ballet	5,000 00		543,994 75
Check	11/14/2011	5790	George Washington University	25,000 00		568,994 75
Check	11/14/2011	5791	National Gallery of Art	3,000 00		571,994 75
Check	11/14/2011	5793	Bair Yaakov School	100 00		572,094 75
Check	11/14/2011	5794	National Cathedral School	1,000 00		573,094 75
Check	11/14/2011	5795	John Hopkins Hospital	1,000 00		574,094 75
Genera	11/30/2011	2010-			3,605 94	570,488 81
Total Donation				574,094 75	3,605 94	570,488 81
TOTAL				574,094.75	3,605.94	570,488.81