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Form **990-PF** Department of the Treasury Internal Revenue Service

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

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

OMB No 1545-0052

For	alen	dar year 2011 or tax year beginning			, and ending		
		foundation				A Employer identification	on number
		HARLE AND STEPHEN	OSMA	N CHARITABLE	•		
		NDATION		.		06-141390	7
		nd street (or P O box number if mail is not delive	red to street	t address)	Room/suite	B Telephone number	•
		WEST HILL ROAD				(203)253-	0512
-		own, state, and ZIP code				C If exemption application is	pending, check here
		MFORD, CT 06902					
G (heck	all that apply: Initial return			ormer public charity	D 1. Foreign organization	ns, check here
		Final return		Amended return		Foreign organizations n	neeting the 85% test,
	Nh = = 1.	Address change		Name change		1	
H	_	type of organization: X Section 50 ction 4947(a)(1) nonexempt charitable true	· · · · · · · · · · · · · · · · · · ·	xempt private foundation Other taxable private founda	ation	E If private foundation st	
1 5				ing method: X Cash	Accrual	under section 507(b)(
		Part II, col. (c), line 16)		ther (specify)	L Accidal	F If the foundation is in a under section 507(b)(
	·\$			ımn (d) must be on cash t	basis.)	under section 507 (b)(T/(D), CHECK Here
	irt I	Analysis of Revenue and Expenses		(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
		(The total of amounts in columns (b), (c), and (c necessarily equal the amounts in column (a))) may not	expenses per books	income	income	for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc., received		129,000.		N/A	
	2	Check fithe foundation is not required to atta	ch Sch B				`
	3	Interest on savings and temporary cash investments					
	4	Dividends and interest from securities		3,190.	3,190.		STATEMENT 2
	5a	Gross rents					
	b	Net rental income or (loss)					
ø	6a	Net gain or (loss) from sale of assets not on line		3,910.	*		STATEMENT 1
Revenue	b	Gross sales price for all assets on line 6a	<u> 181. </u>	TEACH VED	1		
Š	7	Capital gain net income (from Part IV, line 2)	!	RECEIVED	6,872.	, <u> </u>	
т.	8	Net short-term capital gain	100		<u> </u>		
	9	Income modifications Gross sales less returns	3078	NOV 0 5 2012			ļ
	Ι.	and allowances	10	0			<u> </u>
		Less Cost of goods sold	-	GDEN, UT	•		
		Gross profit or (loss) Other income		JODEN, O1			
V	11 12	Total Add lines 1 through 11		136,100.	10,062.	<u> </u>	
202	13	Compensation of officers, directors, trustees, et	•	0.	10,002.		0.
37	14	Other employee salaries and wages	-				·
2		Pension plans, employee benefits					
≥es	l	Legal fees					
Ęğ		Accounting fees STM'	г 3	2,030.	2,030.		0.
[™]	С	Other professional fees					
	17	Interest		43.	43.		0.
Operating and Administrative Expen	18	Taxes STM'	Г 4	179.	160.		0.
	19	Depreciation and depletion					
Œ	20	Occupancy					
¥v	21	Travel, conferences, and meetings					
anc	22	Printing and publications					
ing	23	Other expenses STM'	г 5	285.	285.		0.
rat	24	Total operating and administrative		0 505	0.510		
odc		expenses. Add lines 13 through 23		2,537.	2,518.		0.
_	25	Contributions, gifts, grants paid		31,225.		ļ	31,225.
	26	Total expenses and disbursements.		33,762.	2 510		31,225.
	97	Add lines 24 and 25 Subtract line 26 from line 12:		33,104.	2,518.		31,443.
			oontr.	102,338.			
		Excess of revenue over expenses and disburser Net investment income (if negative, enter -0		102,550.	7,544.		
		Adjusted net income (if negative, enter -0-)			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	N/A	
	<u> </u>	, (interest of the party of the to-)		· · · · · · · · · · · · · · · · · · ·			

THE HARLE AND STEPHEN OSMAN CHARITABLE FOUNDATION

Fo	<u>rm 9</u>	90-PF (2011) FOUNDATION		06-1	1413907 Page
F	Part	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	
_		_ <u> </u>	(a) Book Value	(b) Book Value	(c) Fair Market Value
			52,155.	62,874.	62,874.
		Savings and temporary cash investments		-	
	3	Accounts receivable >			
	١.	Less: allowance for doubtful accounts			
	4	Pledges receivable			
	_	Less. allowance for doubtful accounts Grants receivable			
	5	F			·····
	6	Receivables due from officers, directors, trustees, and other			
	,	disqualified persons Other notes and loans receivable			
	1				
	8	Less: allowance for doubtful accounts Inventories for sale or use			
Assets	1 _	Prepaid expenses and deferred charges			
As	104	Investments - U.S. and state government obligations			
		n Investments - corporate stock STMT 6	160,901.	222 020	221 111
		Investments - corporate stock SIMI 6	100,901.	233,839.	221,111.
		Investments - land, buildings, and equipment, basis			
	' '	Less accumulated depreciation		İ	
	12	· · · · · · · · · · · · · · · · · · ·			
	13	Investments - other	 		
					- <u></u>
	'7	Less accumulated depreciation			
	15	Other assets (describe			
	")			
	16	Total assets (to be completed by all filers)	213,056.	296,713.	283,985.
		Accounts payable and accrued expenses			
	18	Grants payable			
Ş	19	Deferred revenue			v
abilities	20	Loans from officers, directors, trustees, and other disqualified persons	342,488.	323,807.	
ā		Mortgages and other notes payable			
_	22	Other liabilities (describe)			
_	23	Total liabilities (add lines 17 through 22)	342,488.	323,807.	
		Foundations that follow SFAS 117, check here			
co.		and complete lines 24 through 26 and lines 30 and 31.			
č	24	Unrestricted			
ag.	25	Temporarily restricted			
Ä	26	Permanently restricted			
Ĕ		Foundations that do not follow SFAS 117, check here			
<u>ნ</u>		and complete lines 27 through 31.			
ţ	27	Capital stock, trust principal, or current funds	-129,432.	-129,432.	
SSe	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Net Assets or Fund Balances	29	Retained earnings, accumulated income, endowment, or other funds	0.	102,338.	
ž	30	Total net assets or fund balances	-129,432.	-27,094.	
	21	Total liabilities and ast assets found below.	212 056	206 712	
-		Total liabilities and net assets/fund balances	213,056.	296,713.	
<u> </u>	art	Analysis of Changes in Net Assets or Fund Ba	iances		
		net assets or fund balances at beginning of year - Part II, column (a), line 30)		
		st agree with end-of-year figure reported on prior year's return)		1	-129,432.
		r amount from Part I, line 27a		2	102,338.
		r increases not included in line 2 (itemize)		3	0.
		lines 1, 2, and 3		4	-27,094.
		eases not included in line 2 (itemize)		5	27.004
n .	1 (172)	HIPL RECORD OF BLICK DRINGS OF AND AT MOST FLOOR A MINUS LICA K.). Doct II walls	mn (b) line 20	1 4 1	· / · / / / / / / / / / / / / / / / / /

Form 990-PF (2011) FOUNDATION

06-1413907 Page 3

P	Part IV Capital Gains	and Lo	sses for Tax on In	vestmen	t 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 a - Purc - Don	cquired chase ation		acquired lay, yr.)	(d) Date sold (mo., day, yr.)		
1a	AMERICAN INTL	GROUI	P CASH IN LI	EU					01/2	6/11	01/26/11
_ <u>b</u>	287 SHS PHH CO	RP						D	02/0	1/05	02/11/11
						<u> </u>					
_ <u>d</u>						-					
<u>e</u>		(6) [Conreciation allowed	(=) Co.	at as ather bear	Ц			(1) ((1	<u>. </u>
	(e) Gross sales price	(1)	Depreciation allowed (or allowable)		st or other basis expense of sale					ain or (loss s (f) minus i	
a	10.						-		. , ,	···	10.
_ <u>b</u>	- 4-4				30	9.		··			6,862.
_c											
<u>d</u>	·										
_e											
_	Complete only for assets showin									Col. (h) gain not less thai	
	(ı) F.M.V. as of 12/31/69	((j) Adjusted basis as of 12/31/69		cess of col. (i) col. (j), if any				Losses	(from col. (h))
			40 01 120 1700		001. ()), ii aity						1.0
_ <u>a</u>											10. 6,862.
-c				·····			-				0,002.
d											
_ <u>e</u>											
			∫ If gain, also enter	ın Part I, line	7	٦					
2	Capital gain net income or (net ca	pital loss)	If (loss), enter -0-	ın Part I, line	7	[2				<u>6,872.</u>
3	Net short-term capital gain or (los			d (6):							
	If gain, also enter in Part I, line 8,	column (d	c).			 	_			37 / 3	
P	If (loss), enter -0- in Part I, line 8	nder S	ection 4940(e) for	Reduced	l Tay on Not	Inv	3 Octo	nent Inc	ome	N/A	
	r optional use by domestic private										
				340(a) lax 01	i net mvestinent m	COM)				
lf s	ection 4940(d)(2) applies, leave th	is part bla	ank.								
Wa	s the foundation liable for the sect	ion 4942	tax on the distributable amo	ount of any ye	ear in the base per	lod?					Yes X No
	Yes," the foundation does not quali										
1_	Enter the appropriate amount in e	ach colur	nn for each year; see instru	ctions before	making any entrie	es.					(4)
	(a) Base period years	.	(b) Adjusted qualifying disti	ributions	Net value of no	nchai		uca accate		Distrib	(d)
	Calendar year (or tax year beginnin	ig in)			Net value of flor	riciiai				(col. (b) div	ided by col. (c))
	2010 2009			2,526. 5,400.				7,611 2,513			.777395 .274556
_	2008			6,620.				$\frac{2,313}{2,294}$.357988
	2007			1,121.				$\frac{2,234}{5,780}$.670292
	2006			0,310.				5,274			.304404
2	Total of line 1, column (d)								2		2.384635
3	Average distribution ratio for the 5	year bas	e period - divide the total of	n line 2 by 5,	or by the number	of ye	ars				
	the foundation has been in existen	ice if less	than 5 years						3		.476927
4	Enter the net value of noncharitable	e-use ass	sets for 2011 from Part X, li	ne 5					4		209,570.
_											00 050
5	Multiply line 4 by line 3								5		99,950.
_	Fater 19/ of not investment incom	a /10/ a4l	Doet Live 07h)								75
0	Enter 1% of net investment incom	e (176 UII	ranti, iiile 270)						6		<u>75.</u>
7	Add lines 5 and 6								7		100,025.
•									, 100,023.		
8	Enter qualifying distributions from	Part XII,	line 4						8		31,225.
	If line 8 is equal to or greater than See the Part VI instructions.			1b, and comp	lete that part using	g a 19	% tax ı	rate.			

THE HARLE AND STEPHEN OSMAN CHARITABLE Form 990-PF (2011) FOUNDATION 06-1413907 Page Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions Part VI 1a Exempt operating foundations described in section 4940(d)(2), check here \(\bigs \) and enter "N/A" on line 1. Date of ruling or determination letter: (attach copy of letter if necessary-see instructions) 151. b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🔻 📘 and enter 1% of Part I, line 27b 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-) Add lines 1 and 2 3 0. Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-5 151. 6 Credits/Payments: a 2011 estimated tax payments and 2010 overpayment credited to 2011 6a 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 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here _____ if Form 2220 is attached 8 151 9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed 9 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 2012 estimated tax Refunded I 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 Yes No X any political campaign? 1a X b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b 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 Х c Did the foundation file Form 1120-POL for this year? 1c d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. > \$ 0 • (2) On foundation managers. ► \$ 0. e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$ 0. X 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 If "Yes," attach a detailed description of the activities. 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 3 X 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a b If "Yes," has it filed a tax return on Form 990-T for this year? N/A 4b X 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 If "Yes," attach the statement required by General Instruction T. 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 6 Х 7 Did the foundation have at least \$5,000 in assets at any time during the year? 7 If "Yes," complete Part II, col (c), and Part XV 8a Enter the states to which the foundation reports or with which it is registered (see instructions)

Form **990-PF** (2011)

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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)

year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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

of each state as required by General Instruction G? If "No," attach explanation

	THE HARLE AND STEPHEN OSMAN CHARITABLE	•	•	•
	990-PF (2011) FOUNDATION 06-14	<u> 113907</u>		Page 5
	art 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 make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
	If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	L
	Website address ► N/A			
14	The books are in care of ► STEPHEN OSMAN Telephone no. ► 203-		<u>512</u>	
		<u>06905</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	<u>N</u>	/A	
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank,	,	Yes	l
	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign			
-	country >			
Pa	rt VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	0		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?	1 1		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			31
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	o		
	(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)?	o		
	(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.)	o		
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 instructions)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here	_ _		
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			
	before the first day of the tax year beginning in 2011?	1c		<u>X</u>
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)):			
а	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning			
	before 2011? Yes X N	o		
	If "Yes," list the years \blacktriangleright ,,,			
þ	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.)	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.		1	
)			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
	during the year?	o		
b	If "Yes," did it have excess business holdings in 2011 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,		ļ	
	Form 4720, to determine if the foundation had excess business holdings in 2011)	3b		
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		<u>X</u>
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 2011?

Form SECH (2011) FOUNDATION TOTAL PIER DIStatements Regarding Activities for Which Form 4720 May Be Required Continued? Sa During the year did the fundation pay or neur any amount to: (1) Carry on prospagate, or otherwee attempt to influence begintion (section 4945(p)? (2) Influence the outcare of any specific public election (see section 4955); or to carry on, derectly or indirectly, any voter registration done? (3) Provide a grant to an organization deletion of the sense of the section of the sense of the section of the sense of the section of the sense of the sen	THE HARLE AND STEPHEN OS	MAN CHARITABI	ĿΕ	06 14120	0.74 1 - 1
Sa During the year dot the foundation pay or incur any arrount to: (1) Carry on propagating, or indivine alternative indivines a temptor to implicate the outcome of any speache public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? (2) Influence the outcome of any speache public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? (3) Provide a prant to an involved in for than a charitable, etc., organization described in section 596(41); 20, or (3), or section 494(0)(2)? (3) Provide to any purpose other than reliquos, charitable, scientific, literary, or educational purposes, or for the prevention of custly to furdine or animals. b I lary answer or Yes' to 56(1):(5), did any of the transactions fail to quality under the exceptions described in Regulations section 53(4):456 or in a current notice repaining disaster assistance class instructions? Organizations relying on a current notice repaining disaster assistance class instructions? Organizations relying on a current notice regarding disaster assistance class instructions? Organizations relying on a current notice regarding disaster assistance class instructions? Organizations relying on a current notice regarding disaster assistance class instructions? Organization relying on a current notice regarding disaster assistance class instructions? Organization relying on a current notice regarding disaster assistance class instructions? If Yes I No. 1 No. 1 Yes I No. 1 No. 2 Yes I No. 1 Yes I No. 1 No. 2 Yes I No. 1 No. 3 Yes I No. 1 Yes I No. 1 No. 4 Yes I No. 1 No. 5 Yes I No. 1 No. 6 Yes I No. 1 No. 7 Yes I No. 1 No. 7 Yes I No. 1 No. 7 Yes I No. 1 N	Form 990-PF (2011) FOUNDATION Part VII-B Statements Regarding Activities for Which	Form 4720 May Be I	Peguired (seets	<u>U6-14139</u>	U / Page 6
(1) Carry on propagatas, or Otherwase attempts to influence legislation (section 4945(s))? (2) Influence the outcome of any specific public electron (see section 4955); or to carry on, directly or indirectly, any voter registration dries? (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an individual for travel, study, or other similar purposes? (5) Provide for any purpose other than calcariable, etc., organization described in section \$05(4)(1,12), or (5), or section 4940(6)(2)? (6) Provide for any purpose other than estiguous, chariable, scientific, literary, or educational purposes, or for the prevention of cutulty to children or animals? (7) If any answers or *Yes to \$14(1)(4) daily of the transactions teal to qualify under the exceptions described in Regulations section \$3.494.6 or in a current notice regarding dissets assistance there is the providence of the condition of the sanswers of *Yes to \$4(1), does the foundation claim exceptions from the tax because it maintained expenditude responsibility for the grant? (a) Yes, "affach the statement required by Regulations section \$3.4945.5(a) (b) the foundation, during the year, receive any funds, directly or indirectly, on pay primitims on a personal benefit contract? (b) If the foundation, during the year, receive any funds, directly or indirectly, on pay primitims on a personal benefit contract? (c) Winds of the foundation during the year, receive any funds, directly or indirectly, on pay symmitims on a personal benefit contract? (c) Winds of the foundation during the year, yea		TOTTI 4720 Way be I	nequireu (contin	iuea)	
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, drasetly or indirectly, any voter registation drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a chariable, etc., organization described in section 508(01/12, 07, 07), or section 494(0)(2)? (5) Provide for any purpose other than a chariable, etc., organization described in section 508(01/12, 07, 07), or section 494(0)(2)? (6) Provide for any purpose other than a chariable, etc., organization described in section 508(01/12, 07, 07), or section 494(0)(2)? (7) Provide for any purpose other than a chariable, etc., organization described in section 6) If largy answer is "Yes to \$15(1)(5), did any of the transactions fail to qualify under the exceptions described in Regulations section \$3.495 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance sheets here. c If the answer is "Yes" to \$10, use stories \$14(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility in the grant? If "Yes," atrach the statement required by Regulations section \$5.4945-5(g)\$ 8 but the foundation, during the year, pay premiums, directly or indirectly, to a prohibition of the state because it maintained expenditure responsibility for the grant? If "Yes" 10 60, the Form 8870 If "Yes IN No But the foundation or any pay remiums, directly or indirectly, to a prohibition of the state section? If "Yes IN No But the foundation releves any premiums, directly or indirectly, to a prohibition of the state section? If "Yes IN No But the foundation releves any pay remiums, directly or indirectly, to a prohibition of the state section. But the foundation releves any pay remiums, directly or indirectly, to a prohibition of the state section. (a) Name and address of each employees for the variable section of the state sec		n 4045(n)\0		[V],	
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If Yes,* did the foundation receive any proceeds or have any net income attributable to the transaction? N/A 76 Part VIII	·		<u>г</u> 1		
Part VIII			Y ₁	_	
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TRUSTEE TRU		(b) Title, and average		(d) Contributions to employee benefit plans	(e) Expense
TRUSTEE TRU	(a) Name and address		(If not paid, enter -0-)	and deferred compensation	account, other allowances
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	Total number of other employees paid over \$50,000	L	·		<u> </u>
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THE HARLE AND STEPHEN OSMAN CHARITABLE

FOUNDATION	06-14	11390/ Page 7
Part VIII Information About Officers, Directors, Trustees, Fou Paid Employees, and Contractors (continued)	ndation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, e	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 sumber of organizations and other beneficiaries served, conferences convened, research papers	statistical information such as the produced, etc.	Expenses
1N/A		
0		
2		
3		
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year	ar on lines 1 and 2.	Amount
1N/A		
		*
2		
All other program-related investments. See instructions		

>

Total. Add lines 1 through 3

Page 8

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign for	undations, se	e instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	188,975.
b	Average of monthly cash balances	1b	23,786.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	212,761.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0	.	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	212,761.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,191.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	209,570.
6	Minimum investment return Enter 5% of line 5	6	10,479.
P	part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations a foreign organizations check here and do not complete this part.)	and certain	
1	Minimum investment return from Part X, line 6	1	10,479.
2a			
b	Income tax for 2011. (This does not include the tax from Part VI.)	1	
C	Add lines 2a and 2b	2c	151.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	10,328.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	10,328.
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	10,328.
_	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	The state of the s	1a	31,225.
b		1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	31,225.
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	31,225.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation	qualifies for th	
	4940(e) reduction of tax in those years.	-	

Form **990-PF** (2011)

Form 990-PF (2011) FOUNDATION

06-1413907 Page 9

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI,	00.720	7 00.0 77.0 10 10		
line 7				10,328.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			0.	
b Total for prior years:		•		
		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006 42,074.				
b From 2007 103,930.				
c From 2008 31,536.				
d From 2009 21,619.				
e From 2010 114,683.				
f Total of lines 3a through e	313,842.			
4 Qualifying distributions for 2011 from				
Part XII, line 4: ►\$ 31,225.				
a Applied to 2010, but not more than line 2a			0.	
b Applied to undistributed income of prior		0		
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	0.			
(Election required - see instructions) d Applied to 2011 distributable amount	0.			10,328.
e Remaining amount distributed out of corpus	20,897.			10,520.
5 Excess distributions carryover applied to 2011	20,057.			0.
(If an amount appears in column (d), the same amount must be shown in column (a))				<u> </u>
6 Enter the net total of each column as indicated below				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	334,739.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years'		<u>-</u>		
undistributed income for which a notice of				
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 2010. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2011. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2012				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by	0			
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2006	42 074			
not applied on line 5 or line 7	42,074.			
9 Excess distributions carryover to 2012 Subtract lines 7 and 8 from line 6a	292,665.			
	434,003.	· · · · · · · · · · · · · · · · · · ·		
10 Analysis of line 9: a Excess from 2007 103, 930.				
b Excess from 2008 31,536.				
c Excess from 2009 21,619.				
d Excess from 2010 114,683.				
e Excess from 2011 20,897.				
20,000,000				- 000 PF

THE HARLE AND STEPHEN OSMAN CHARITABLE Form 990-PF (2011) <u>06-141</u>3907 Page 10 FOUNDATION Part XIV | Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling 4942(j)(5) b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or Tax year Prior 3 years 2 a Enter the lesser of the adjusted net (e) Total (a) 2011 (d) 2008 (b) 2010 (c) 2009 income from Part I or the minimum investment return from Part X for each year listed **b** 85% of line 2a c Qualifying distributions from Part XII. line 4 for each year listed d Amounts included in line 2c not used directly for active conduct of exempt activities e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i) b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(III) (3) Largest amount of support from an exempt organization (4) Gross investment income Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.) 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).) SEE STATEMENT 7 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 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:

Form 990-PF (2011) FOUNDATION

Part XV Supplementary Information (continued) 06-1413907 Page 11

3 Grant	s and Contributions Paid During the Y	ear or Approved for Future	Payment		
	Recipient	If recipient is an individual,	Foundation	Purpose of grant or	
Na	me and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	status of recipient	Purpose of grant or contribution	Amount
a Paid	during the year				
SEE ATTAG	CHED SCHEDULE	NONE	PUBLIC		
				GENERAL	31,225.
					:
 					
Total			<u> </u>	▶ 3a	31,225,
	oved for future payment				
	NONE				
	2.02.2				
			ļ		
Total				▶ 3b	0.

Form 990-PF (2011) FOUNDATION

06-1413907 Page 12

Part XVI-A	Analysis of Income-Producing Activities
Lait VAI-W	Analysis of income-Floudchig Activitie

Enter gross amounts unless otherwise indicated.	Unrelated	business income		y section 512, 513, or 514	(e)
-	(a) Business	(b) Amount	(C) Exclu- sion	(d)	Related or exempt
1 Program service revenue:	code	Amount	code	Amount	function income
a	-		_		
b		·			
C	_				
d	_		_		
e	_				
<u> </u>	_				
g Fees and contracts from government agencies					
2 Membership dues and assessments	<u> </u>	 			
3 Interest on savings and temporary cash					
investments 4 Dividends and interest from securities		··	14	2 100	
5 Net rental income or (loss) from real estate:			14	3,190.	
a Debt-financed property					
b Not debt-financed property		 			
• • •					
6 Net rental income or (loss) from personal					
property	<u> </u>				
7 Other investment income					
8 Gain or (loss) from sales of assets other				2 242	
than inventory			18	3,910.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory		·			
11 Other revenue:					
a	_				
b	_				
C	_				
d	_				
e	_				
12 Subtotal. Add columns (b), (d), and (e)		().	7,100.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	7,100.
(See worksheet in line 13 instructions to verify calculations.)				
Part XVI-B Relationship of Activities	s to the Accor	nplishment of	Exempt Pi	umoses	
Line No. Explain below how each activity for which in	icome is reported in	column (e) of Part XV	I-A contributed	importantly to the accomp	lishment of

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

THE HARLE AND STEPHEN OSMAN CHARITABLE

orm 990-PF (2011)	FOUNDATION

06-1413907

Page 13 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of Yes No 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 X 1a(1) (2) Other assets X 1a(2) **b** Other transactions: (1) Sales of assets to a noncharitable exempt organization 16(1) (2) Purchases of assets from a noncharitable exempt organization 1b(2) X (3) Rental of facilities, equipment, or other assets X 1b(3) (4) Reimbursement arrangements 1b(4) (5) Loans or loan guarantees 1b(5) Х (6) Performance of services or membership or fundraising solicitations 1b(6) c Sharing of facilities, equipment, mailing lists, other assets, or paid employees 1c 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. (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements N/A 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described X No in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes If "Yes," complete the following schedule. (a) Name of organization (b) Type of organization (c) Description of relationship camined this return, including accompanying schedules and statements, and to the best of my knowledge return with the preparer shown below (see instr.)? Sign Here X Yes Signature of officer or trustee Title Date Print/Type preparer's name Check Preparer's signature self-employed 11/1/12 Paid LINDA P. MODUGNO P00041019 **Preparer** Firm's name ► KAHAN, STEIGER & COMPANY, Firm's EIN $\triangleright 06-1443759$ P.C. Use Only

Form **990-PF** (2011)

203-327-5717

Phone no.

Firm's address ▶ 1100 SUMMER STREET

STAMFORD, CT 06905-0227

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Name of the organization

Schedule of Contributors

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

THE HARLE AND STEPHEN OSMAN CHARITABLE

OMB No 1545-0047

2011

Employer identification number

FOUNDATION 06-1413907 Organization type (check one) Filers of: Section: Form 990 or 990-EZ 501(c)() (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization Form 990-PF X 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions General Rule For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor Complete Parts I and II. Special Rules For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$

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

certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization

THE HARLE AND STEPHEN OSMAN CHARITABLE

Employer identification number

06-1413907

FOUNDATION

Part I	Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.					
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution			
1	STEPHEN OSMAN 57 WEST HILL ROAD STAMFORD, CT 06902	\$ 129,000.	Person X Payroll			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution			
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution			
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution			
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution			
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution			
		\$\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)			

(d)

Date received

(d)

•			
	B (Form 990, 990-EZ, or 990-PF) (2011)		Page
Name of org			Employer identification number
	ARLE AND STEPHEN OSMAN CHARITABLE		
FOUND	ATION		06-1413907
Part II	Noncash Property (see instructions) Use duplicate copies of Par	t II if additional space is neede	d
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate (see instructions	l Date received
		 \$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate (see instructions	i liato receivad
		\$	
(a)			

Part I	(See man dedons)	
	\$	

(b)

Description of noncash property given

(b)

(c)

FMV (or estimate)

(c) FMV (or estimate)

from Part I	Description of noncash property given	FMV (or estimate) (see instructions)	Date received
		\$	

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

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

No.

from

(a)

No.

anne on ongam THE HAD	zation LE AND STEPHEN OSMAN (~ひょり てがょりこ で		Employer identification number
OUNDAT		CHARTIADLE		06-1413907
Part III	Exclusively religious, charitable, etc., indiv year Complete columns (a) through (e) and the the total of exclusively religious, charitable, etc Use duplicate copies of Part III if additional	e following line entry. For organizat ., contributions of \$1,000 or less fo	ions completing Part III, e	zations that total more than \$1,000 for the
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) [Description of how gift is held
-		(a) T		
	To act with a control of	(e) Transfer of g		
-	Transferee's name, address, ar	Id ZIP + 4	Helationship o	f transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) [Description of how gift is held
-				
		(e) Transfer of g	ft	
	Transferee's name, address, ar	d ZIP + 4	Relationship o	f transferor to transferee
-			<u> </u>	
a) No.				
from Part I	(b) Purpose of gift	(c) Use of gift	(d) C	Description of how gift is held
_				
		(e) Transfer of gi	m	
	Transferee's name, address, an	d ZIP + 4	Relationship of	f transferor to transferee
			· · · · · · · · · · · · · · · · · · ·	
a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) C	Description of how gift is held
		(a) Tf(
	Transferee's name, address, an	(e) Transfer of gi		f transferor to transferee
_				

FORM 990-PF GAIN OR (1	LOSS) FF	ROM SALE	OF A	SSETS		STA	TEMENT	1
(A) DESCRIPTION OF PROPERTY				ANNER QUIRED	DA ACQU	TE IRED	DATE	SOLD
AMERICAN INTL GROUP CASH IN LIE	U		PUR	CHASED	01/2	6/11	01/2	6/11
(B) (C)	O.D.	(D)	OF	(E)			(F)	
GROSS COST (SALES PRICE OTHER BA		EXPENSE SALE	OF.	DEPRE	c.	GAIN	OR LO	SS
10.	0.		0.		0.			10.
(A) DESCRIPTION OF PROPERTY				ANNER QUIRED	DA ACQU	TE IRED	DATE	SOLD
287 SHS PHH CORP			DO	NATED	02/0	1/05	02/1	1/11
(B) (C) GROSS VALUE SALES PRICE TIME OF		(D) EXPENSE SALE	OF	(E)	c.		(F) OR LO	ss
7,171.	3,271.		0.		0.		3,	900.
CAPITAL GAINS DIVIDENDS FROM PAI	RT IV	-					,	0.
TOTAL TO FORM 990-PF, PART I, L	INE 6A				-		3,	910.
FORM 990-PF DIVIDENDS A	AND INTE	EREST FRO	M SE	CURITIE	S	STA	TEMENT	2
SOURCE	GROS	SS AMOUNT		APITAL (LUMN (AMOUNT	
FIDELITY #157-227617					0.		2	190.
		3,190	•		0.		٥,	100.

FORM 990-PF	ACCOUNTING FEES			STATEMENT 3		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME				
	2,030.	2,030.		0.		
TO FORM 990-PF, PG 1, LN 16B	2,030.	2,030.		0.		
FORM 990-PF	TAX	ES		STATEMENT 4		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME				
2010 EXCISE TAXES FOREIGN TAXES	19. 160.	0. 160.		0.		
TO FORM 990-PF, PG 1, LN 18 =	179.	160.		0.		
FORM 990-PF	OTHER E	XPENSES		STATEMENT 5		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM			
MISCELLANEOUS	285.	285.		0.		
TO FORM 990-PF, PG 1, LN 23	285.	285.		0.		
FORM 990-PF	CORPORAT	E STOCK		STATEMENT 6		
DESCRIPTION		вос	OK VALUE	FAIR MARKET VALUE		
5 WHITE MTNS INSURANCE 7 AMERICAN INTL GROUP 150 BERKSHIRE HATHAWAY 70 GATX CORP 160 NIKE CLASS B 4 WASHINGTON POST 287 PHH CORP			1,742. 6,052. 7,040. 1,078. 4,168. 2,901.	2,267. 127. 11,445. 3,056. 15,419. 1,507.		

THE HARLE AND STEPHEN OSMAN CHARITABLE F		06-1413907
555 COMCAST CORP	15,597.	13,159.
232 GANNETT CO.	13,550.	3,102.
150 HARLEY DAVIDSON	9,578.	5,830.
324 THOR INDUSTRIES	13,571.	8,887.
150 USG CORP	7,244.	1,524.
159 SHRS GUGGENHM CHINA SM CAP	5,020.	3,069.
62 SHRS ISHARES BRAZIL INDEX	5,066.	3,558.
67 SHRS ISHARES CHILE INVESTABLE	5,003.	3,867.
366 SHRS ISHARES TAIWAN INDEX	4,996.	4,286.
90 SHRS ISHARES SOUTH KOREA INDEX	5,014.	4,703.
71 SHRS ISHARES SOUTH AFRICA	5,092.	4,336.
354 SHRS ISHARES MALAYSIA FREE INDEX	5,088.	4,744.
300 SHRS KINDER MORGAN	18,286.	25,485.
162 SHRS MKT VECT BRAZIL SM CAP	10,136.	5,903.
56 SHRS MARKET VECTOR INDONESIA	5,025.	4,783.
180 SHRS WISDOMTREE	5,008.	2,808.
100 SHRS APPLE	35,775.	40,500.
APPLE INC CALLS	25,907.	28,305.
400 SHRS BRISTOL MYERS	10,176.	14,096.
100 SHRS GUGGENHM CANADIAN EGY	2,320.	1,685.
100 SHRS ISHARES CANADA INDEX	3,406.	2,660.
TOTAL TO FORM 990-PF, PART II, LINE 10B	233,839.	221,111.

FORM 990-PF PART XV - LINE 1A STATEMENT 7
LIST OF FOUNDATION MANAGERS

NAME OF MANAGER

STEPHEN OSMAN HARLE OSMAN

THE HARLEY & STEPHEN OSMAN CHARITABLE FOUNDATION YEARLY CONTRIBUTION 2011

Avon Film Center	1/9/2011	10,000.00
Avon Film Center	5/21/2011	\$ 2,500.00
Avon Theater	10/28/2011	\$ 2,000.00
Bartlet Arboretum	7/20/2011	\$ 300.00
Center of Childrens Advocacy	1/19/2011	\$ 100.00
Food Allergy Jaffe Institute	11/16/2011	\$ 2,500.00
Friend of Greenwich Point	1/10/2011	\$ 50.00
Greenwich Academy Annual F	12/26/2011	\$ 250.00
Home for de Age Riverside	4/20/2011	\$ 50.00
JHS	5/18/2011	\$ 250.00
JCC (Art and Film Festival)	9/24/2011	\$ 350 00
Jonas Nursing Excellence found.	4/22/2011	\$ 1,000.00
Kids Fundation	5/3/2011	\$ 200.00
Kids in Crisis	4/6/2011	\$ 50.00
Kids in Crisis	11/11/2011	\$ 2,500.00
Lincon Center for Performing Arts	10/28/2011	\$ 1,000.00
Literacy Volunteers	12/1/2011	\$ 50.00
NationalTrust for Historic Preservation	10/25/2011	\$ 1,000.00
NPR Foundation	8/15/2011	\$ 1,000.00
Patron Newark WDET	12/7/2011	\$ 1,500.00
Planned Parenthood	2/9/2011	\$ 1,000 00
S L E Lupus Foundation	3/11/2011	\$ 500.00
S L E Lupus Foundation	9/21/2011	\$ 1,000.00
SACEC	3/11/2011	\$ 175.00
Stamford Hospital Foundation	10/21/2011	\$ 100.00
Stamford Public Education Award	2/6/2011	\$ 250.00
Temple Beth EL	12/26/2011	\$ 50.00
Walk It Out	7/8/2011	\$ 500.00
Waterside School	5/24/2011	\$ 1,000.00

Total \$ 31,225.00

				•	• •
Form 8868 (Rev 1-2012)					Page 2
 If you are filing for an Additional (Not Automatic) 3-Month Ex 				>	LX.
Note. Only complete Part II if you have already been granted an a			ed Form	8868	
• If you are filing for an Automatic 3-Month Extension, comple			17		
Part II Additional (Not Automatic) 3-Month E	xtensio	<u> </u>	•	 	
Enter filer's identifying number, see instru					
Type or Name of exempt organization or other filer, see instru			Employe	r identification numb	er (EIN) or
print THE HARLE AND STEPHEN OSMAN CHARITABLE					_
				06-141390	
filing your Indirect, street, and room or suite no if a PO box, see instructions				curity number (SSN)
return See Instructions City town or post office state and ZID and a Face forms address and address an					
City, town or post office, state, and zir code. For a foreign address, see instructions					
STAMFORD, CT 06902	·		 -		
Enter the Return code for the return that this application is for (file	e a separa	te application for each return)			0 4
	T	Y			
Application	Return	Application			Return
ls For	Code	Is For			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.					
STEPHEN OSMAN					
 The books are in the care of ► 1100 SUMMER STREET - STAMFORD, CT 06905 					
Telephone No ► 203-253-0512 FAX No ►					
If the organization does not have an office or place of business in the United States, check this box					
• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for the whole group, check this					
box If it is for part of the group, check this box and attach a list with the names and EINs of all members the extension is for					
4 I request an additional 3-month extension of time until NOVEMBER 15, 2012					
5 For calendar year 2011, or other tax year beginning, and ending					
6 If the tax year entered in line 5 is for less than 12 months, check reason: Initial return Final return					
Change in accounting period					
7 State in detail why you need the extension					
INFORMATION FROM OUTSIDE SOURCES NECESSARY TO COMPLETE AN ACCURATE					
RETURN HAS BEEN DELAYED.					
8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any					_
nonrefundable credits. See instructions				\$	0.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated				•	
tax payments made Include any prior year overpayment allowed as a credit and any amount paid					_
previously with Form 8868			8b	\$	0.
c Balance due. Subtract line 8b from line 8a Include your payment with this form, if required, by using					
EFTPS (Electronic Federal Tax Payment System) See instructions				\$	0.
_		st be completed for Part II o	-		
Under penalties of perjury, I declare that I have examined this form, including it is true, correct, and complete, and that I am authorized to prepare this fo	ng accomp	anying schedules and statements, and to	the best o	f my knowledge and be	elief,
•	1111.				
Signature Title			Date	•	

Form 8868 (Rev 1-2012)