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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

2011

For calendar year 2011, or tax year beginning 01-01-2011 , and ending 12-31-2011

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
S & J LURJE MEMORIAL FOUNDATION

A Employer identification number
13-6176033

Number and street (or P O box number if mail is not delivered to street address) Room/suite
C/O RICHARD NADELMAN 880 THIRD AVE

B Telephone number (see page 10 of the instructions)

City or town, state, and ZIP code
NEW YORK, NY 10022

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 12,941,937

J Accounting method ☑ Cash ☐ Accrual
☐ Other (specify) _
(Part I, column (d) must be on cash basis.)

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	426,047	426,047	426,047	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-846,284			
	b	Gross sales price for all assets on line 6a 15,285,370				
	7	Capital gain net income (from Part IV, line 2)				
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	500	500	500	
	12	**Total.** Add lines 1 through 11	-419,737	426,547	426,547	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	48,000			
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	12,011	12,011	12,011	
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	22,079	19,093	19,093	
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	96,856	96,856	96,856	
	24	**Total operating and administrative expenses.** Add lines 13 through 23	178,946	127,960	127,960	0
	25	Contributions, gifts, grants paid	710,000			710,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	888,946	127,960	127,960	710,000
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-1,308,683			
	b	**Net investment income** (if negative, enter -0-)		298,587		
	c	**Adjusted net income** (if negative, enter -0-)			298,587	

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

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	8,576	4,011	4,011
	2	Savings and temporary cash investments	94,044	169,777	169,777
	3	Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	11,391		611
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	14,266,492	11,188,065	11,069,593
	c	Investments—corporate bonds (attach schedule)		1,710,553	1,697,945
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	14,380,503	13,072,406	12,941,937
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)		586	
	23	**Total liabilities** (add lines 17 through 22)		586	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here** ▶ ☑ **and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted	14,380,503	13,071,820	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ **and complete lines 27 through 31.**			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see page 17 of the instructions)	14,380,503	13,071,820	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	14,380,503	13,072,406	

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	14,380,503
2	Enter amount from Part I, line 27a	2	-1,308,683
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	13,071,820
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	13,071,820

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	See Additional Data Table			
b				
c				
d				
e				

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

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	-846,284
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8	3	-53,442

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 page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010	672,611	14,659,503	0 04588
2009	697,593	13,339,411	0 05230
2008	1,368,288	16,697,754	0 08194
2007	500,000	19,740,252	0 02533
2006		12,366,154	

2	**Total** of line 1, column (d)	2	0 20545
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 04109
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	14,364,110
5	Multiply line 4 by line 3	5	590,221
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,986
7	Add lines 5 and 6	7	593,207
8	Enter qualifying distributions from Part XII, line 4	8	710,000

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ **(attach copy of letter if necessary–see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	2,986
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	
3	Add lines 1 and 2			3	2,986
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	2,986
6	Credits/Payments				
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a	2,400		
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	2,400
8	Enter any **penalty** for underpayment of estimated tax Check here ☑ if Form 2220 is attached			8	22
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	608
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	
11	Enter the amount of line 10 to be **Credited to 2012 estimated tax** ▶	**Refunded** ▶		11	

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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ _____ **(2)** On foundation managers ▶ $ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ NY			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

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 page 20 of the instructions).	**11**		**No**
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	**12**		**No**
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	**13**	**Yes**	

Website address ▶ N/A

14 The books are in care of ▶ RICHARD NADELMAN Telephone no ▶ (212) 752-3380

Located at ▶ 880 THIRD AVENUE NEW YORK NY ZIP+4 ▶ 10022

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**

			Yes	No
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	**16**	**Yes**	

See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶ SZ

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		**Yes**	**No**
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ **Yes** ☑ **No**			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ **Yes** ☑ **No**			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ **Yes** ☑ **No**			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ **Yes** ☑ **No**			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ **Yes** ☑ **No**			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ **Yes** ☑ **No**			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	**1b**		**No**
	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**		**No**
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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? ☐ **Yes** ☑ **No**			
	If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see page 20 of the instructions)	**2b**		**No**
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ **Yes** ☑ **No**			
b	If "Yes," did it have excess business holdings in 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, Form 4720, to determine if the foundation had excess business holdings in 2011.)*	**3b**		**No**
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	**4a**		**No**
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?	**4b**		**No**

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	**5b**		**No**
	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? ☐ Yes ☑ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		**No**
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		**No**

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
DANIEL RAPOPORT 219 EAST 81 STREET NEW YORK, NY 10028	Vice President 5 00	16,000		
RICHARD NADELMAN 880 THIRD AVENUE NEW YORK, NY 10022	SEC'TY - TREAS 5 00	16,000		
MORRIS LIPTON 100 CROSSWAYS PARK WEST 206 WOODBURY, NY 11797	President 5 00	16,000		

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

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

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

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".

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

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

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

Part IX-B **Summary of Program-Related Investments** (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions **3**	
Total. Add lines 1 through 3. . . . . ▶	

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	14,539,998
b	Average of monthly cash balances		1b	42,855
c	Fair market value of all other assets (see page 24 of the instructions)		1c	0
d	**Total** (add lines 1a, b, and c)		1d	14,582,853
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	
3	Subtract line 2 from line 1d		3	14,582,853
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)		4	218,743
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	14,364,110
6	**Minimum investment return.** Enter 5% of line 5		6	718,206

Part XI **Distributable Amount** (see page 25 of the 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	718,206
2a	Tax on investment income for 2011 from Part VI, line 5	2a 2,986		
b	Income tax for 2011 (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	2,986
3	Distributable amount before adjustments Subtract line 2c from line 1		3	715,220
4	Recoveries of amounts treated as qualifying distributions		4	
5	Add lines 3 and 4		5	715,220
6	Deduction from distributable amount (see page 25 of the instructions)		6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1		7	715,220

Part XII **Qualifying Distributions** (see page 25 of the 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	710,000
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	710,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	2,986
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	707,014

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

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				715,220
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only.			709,885	
b Total for prior years 20___ , 20___ , 20___				
3 Excess distributions carryover, if any, to 2011				
a From 2006.				
b From 2007.				
c From 2008.				
d From 2009.				
e From 2010.				
f **Total** of lines 3a through e.				
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ $ 710,000				
a Applied to 2010, but not more than line 2a			709,885	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d Applied to 2011 distributable amount.				115
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2011 *(If an amount appears in column (d), the same amount must be shown in column (a).)*				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
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.				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .				
e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				715,105
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 **Excess distributions carryover to 2012.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2007. . . .				
b Excess from 2008. . . .				
c Excess from 2009. . . .				
d Excess from 2010. . . .				
e Excess from 2011. . . .				

Part XIV **Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9)

1a 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. . . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2011	**(b)** 2010	**(c)** 2009	**(d)** 2008	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
c "Support" alternative test—enter **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV **Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year—see page 27 of the instructions.)**

1 Information Regarding Foundation Managers:

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

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

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ▶ ☑ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . . ▶ **3a**				710,000
b *Approved for future payment*				
Total . . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	426,047	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	-846,284	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a MISCELLANEOUS INCOME					500
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				-420,237	500
13 **Total.** Add line 12, columns (b), (d), and (e)					13 -419,737

(See worksheet in line 13 instructions on page 28 to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)
4	INCOME FROM DIVIDENDS AND INTEREST IS USED TO MAKE CONTRIBUTIONS TO VARIOUS CHARITABLE ORGANIZATIONS

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		No
	(2) Other assets	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
	(3) Rental of facilities, equipment, or other assets	1b(3)		No
	(4) Reimbursement arrangements	1b(4)		No
	(5) Loans or loan guarantees	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

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

****** | 2012-08-09 | ******

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's Signature ▶ ROBERT LIPTON CPA	Date	Check if self-employed ▶ ☐	PTIN
Firm's name ▶ IVES SULTAN & SPIKE CPA		Firm's EIN ▶	
Firm's address ▶ 100 Crossways Park West Woodbury, NY 11797		Phone no (516)496-9500	

May the IRS discuss this return with the preparer shown above? See instructions ▶ ☑ Yes ☐ No

Additional Data

Software ID: 11000144
Software Version: 2011v1.2
EIN: 13-6176033
Name: S & J LURJE MEMORIAL FOUNDATION

Form 990PF - Special Condition Description:

Special Condition Description

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
MISCELLANEOUS	P	2000-01-01	2011-12-31
25000 GE CAP UK FUNDING	P	2009-09-17	2011-09-19
33000 ICO 4 5% SPAIN	P	2009-04-14	2011-09-16
65000 BAYER	P	2009-09-17	2011-09-16
180000 LAND NORDHEIN WESTFALEN	P	2010-08-30	2011-09-16
30000 CANADA	P	2010-05-07	2011-09-16
100 TE CONNECTIVITY	P	2011-10-26	2011-12-05
100 ST JUDE MEDICAL	P	2011-10-26	2011-12-09
225 SPECTRA ENERGY	P	2011-10-26	2011-12-12
75 SEMPRA ENERGY	P	2011-10-26	2011-12-09
90 NOVELLUS SYSTEM	P	2011-10-26	2011-12-15
100 AMERICAN EXPRESS	P	2011-10-26	2011-12-05
70 COLGATE PALMOLIVE	P	2011-10-26	2011-11-09
80 NORFOLK SOUTH	P	2011-10-26	2011-11-08
40 EI DU PONT DE NEMOURS	P	2009-12-15	2011-11-08
16842 JPM SHORT	P	2011-09-12	2011-11-07
50 DENDREON	P	2011-10-26	2011-11-03
100 DENDREON	P	2011-10-26	2011-11-03
40 MONSANTO	P	2011-10-26	2011-11-02
80 BROADCOM	P	2011-10-26	2011-11-01
60 NOVELLUS SYSTEM	P	2011-10-26	2011-11-01
90 CVS	P	2011-10-26	2011-10-31
125 PUBLIC	P	2011-10-26	2011-10-28
90 VERIZON COMMUNICATION	P	2011-10-26	2011-10-28
840 INDITEX	P	2008-11-05	2011-10-28
5525 ISHARES MSCI	P	2011-10-06	2011-11-28
75 KELLOGS	P	2011-10-26	2011-11-28
2675 WELLS FARGO	P	2011-03-01	2011-10-26
2050 UNITED TECHNOLOGIES	P	2009-04-30	2011-10-26
230 TRAVELERS COMPANY	P	2011-03-01	2011-10-21

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
1170 TRAVELERS COMPANY	P	2008-04-30	2011-10-21
1875 QUALCOMM INC	P	2011-05-17	2011-10-26
1600 PROCTER & GAMBLE	P	2011-03-01	2011-10-26
2330 MORGAN STANLEY	P	2009-12-15	2011-10-26
1190 MCKESSON	P	2008-04-30	2011-10-21
2350 MCDONALDS	P	2008-04-30	2011-10-21
440 MARRIOT INT'L	P	2011-03-01	2011-10-21
2660 MARRIOT INT'L	P	2009-12-15	2011-10-21
1725 JOHNSON & JOHNSON	P	2011-12-15	2011-10-26
1815 HEWLETT PACKARD	P	2008-08-04	2011-10-26
50 GOOGLE	P	2011-03-01	2011-10-26
150 GOOGLE	P	2008-04-30	2011-10-26
5100 GENERAL ELECTRIC	P	2009-12-15	2011-10-26
1625 EXXON MOBIL	P	2009-12-15	2011-10-26
1775 EI DU PONT DE NEMOURS	P	2009-12-15	2011-10-26
2625 CONOCOPHILLPS	P	2009-12-15	2011-10-26
230 COCA COLA	P	2011-03-01	2011-10-26
1570 COCA COLA	P	2008-08-04	2011-10-26
1050 HOLCIM	P	2010-09-22	2011-09-28
3600 UBS AG	P	2010-09-22	2011-09-28
610 KUEHNE	P	2010-09-22	2011-09-28
260 SYGENTA	P	2010-09-22	2011-09-28
145 ST GALLER	P	2010-09-22	2011-09-28
200000 SWEDISH GOV	P	2010-05-07	2011-09-16
8200 ERICKSON	P	2010-09-27	2011-09-28
10000 OVERSEA CHINA	P	2010-09-23	2011-09-28
4000 UNITED OVERSEA	P	2010-09-23	2011-09-28
2500 XSTRATA	P	2009-12-15	2011-09-28
4115 DIAGEO	P	2010-12-10	2011-09-28
1365 RECKITT	P	2010-12-10	2011-09-28

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
2200 SCOTTISH & SOUTH	P	2009-08-13	2011-09-28
500 FANUC	P	2010-09-28	2011-10-24
1100 SHIMANO	P	2010-10-05	2011-09-28
1900 HONDA	P	2010-09-28	2011-09-28
2100 DAIKIN	P	2010-11-26	2011-09-28
2900 KOMATSU	P	2010-09-28	2011-09-28
6000 HITACHI	P	2010-09-28	2011-09-28
1930 ERSTE GROUP	P	2011-09-09	2011-09-28
1780 SAMPO	P	2011-05-19	2011-09-28
3600 TELEFONICA	P	2010-09-27	2011-09-28
1935 SAIPEM	P	2010-12-10	2011-09-28
2660 GDF SUEZ	P	2010-09-27	2011-09-28
2400 WOOLWORTH	P	2010-09-23	2011-09-28
280 ZURICH FINANCIAL SVCS	P	2010-09-22	2011-09-27
16000 VODAFONE GRP	P	2008-08-05	2011-09-27
1860 TOTAL	P	2010-09-27	2011-09-27
190 THE SWATCH GROUP AG	P	2010-09-22	2011-09-27
170 SWISSCOM	P	2010-09-22	2011-09-27
7900 SMITH & NEPHEW	P	2010-12-10	2011-09-27
1800 SAP	P	2010-09-27	2011-09-28
17600 SANDS CHINA LTD	P	2011-05-19	2011-09-27
1812 ROYAL DUTCH SHELL	P	2011-03-28	2011-09-27
4230 PRUDENTIAL	P	2009-12-15	2011-09-27
2285 NEXT	P	2010-12-10	2011-09-27
470 MUNCHENER RUCKVERSICHERUNGS	P	2009-12-15	2011-09-27
480 LVMH	P	2008-12-15	2011-09-27
5800 KONINKLIJKE KPN NV	P	2010-09-22	2011-09-27
7520 HSBC HOLDINGS	P	2009-12-15	2011-09-27
2000 HEIDELBERG CEMENT	P	2010-09-27	2011-09-27
1260 FRESENIUS MEDCA	P	2008-04-30	2011-09-28

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
1220 DANONE	P	2010-09-27	2011-09-27
3490 CRODA INT'L	P	2009-12-15	2011-09-22
1300 COMMON WEALTH BANK OF AUSTRIA	P	2010-09-23	2011-09-22
5000 CHEUNG KONG (HOLDINGS	P	2010-09-24	2011-09-22
1400 CANON INC	P	2010-09-28	2011-09-22
12000 BP PLC	P	2009-12-15	2011-09-22
900 BNP PARIBAS	P	2009-06-05	2011-09-22
1800 BHP BILLITON LTD	P	2010-09-23	2011-09-22
8900 BARCLAYS	P	2009-12-15	2011-09-22
4180 BANCO SANTANDER SA	P	2009-12-15	2011-09-22
6480 BAE SYSTEMS	P	2009-12-15	2011-09-22
5250 ATLAS COPCO AB	P	2011-05-19	2011-09-22
3000 ANZ AUSTRALIA & NEW ZELAND	P	2010-09-23	2011-09-22
1540 ANHEUSER BUSH IN BEV SA	P	2010-12-10	2011-09-22
1680 ALSTOM	P	2010-09-27	2011-09-22
1330 ADECCO SA	P	2010-09-22	2011-09-22
3210 ABB LTD	P	2010-09-22	2011-09-22
10000 HEWLETT PACKARD	P	2011-04-26	2011-09-16
50000 HEWLETT PACKARD	P	2011-04-19	2011-09-16
6000 GENERAL ELECTRIC	P	2011-04-19	2011-09-16
12900 MSCI SWITZERLAND INDEX	P	2009-12-15	2011-09-14
13300 MSCI EMU INDEX	P	2010-03-08	2011-09-13
4150 VANGUARD INDEX EFT	P	2011-02-03	2011-09-14
2620 ISHARES S&P LATIN AMERICA	P	2010-09-17	2011-09-13
12000 MSCI UK IDX FD	P	2008-04-30	2011-09-20
11100 SPDR INDEX	P	2010-09-17	2011-09-20
100000 SIEMENS FINANCIERING	P	2010-10-05	2011-09-19
80000 PROVINCE OF MANITOBA	P	2011-03-22	2011-09-16
7500 MFS EMERGING MARKET EQT	P	2010-09-17	2011-09-13
13600 MFS SERIES INT NEW DISC	P	2011-02-04	2011-09-13

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
11500 A TEMPLETON GLOBAL INV EMERG	P	2010-09-17	2011-09-13
900 A TEMPLETON GLOBAL INV	P	2011-02-24	2011-09-13
8400 A TEMPLETON GLOBAL INV	P	2010-09-17	2011-09-13
5500 A fEDERATED EQUITY FUNDS	P	2011-03-02	2011-09-13
58000 A fEDERATED EQUITY FUNDS	P	2008-04-30	2011-09-13
29900 MFS CORE EQUITY	P	2009-12-15	2011-09-13
1100 A PIONEER FUND	P	2011-03-02	2011-09-13
7200 A PIONEER FUND	P	2008-04-30	2011-09-13
660 CIE DE SAINT GOBAIN	P	2010-09-27	2011-05-19
1080 CIE DE SAINT GOBAIN	P	2009-12-15	2011-05-19
35000 EUROPAISCHE	P	2008-04-30	2011-02-03
10000 EUROPAEISCHE	P	2009-10-13	2011-03-10
5015 INTESA SANPAOLO SPA	P	2009-12-15	2011-01-27
140000 CONOCOPHILLPS	P	2009-09-17	2011-02-03
45000 CONOCOPHILLPS	P	2011-01-04	2011-02-03
10000 FRANCE TELECOM	P	2009-04-14	2011-03-10
48800 BLACKROCK FUNDS	P	2010-12-14	2011-07-07
35650 A FEDERATED WORLD INVEST	P	2010-04-20	2011-07-07
27400 A AIM INVST SEC	P	2008-04-30	2011-07-07
22800 A MFS SERIES TRUST X	P	2010-04-20	2011-07-07
4000 VONCERT VONTOBEL	P	2010-07-08	2011-07-05
415000 DEFENDER VONTI	P	2010-12-16	2011-07-05
110000 E ON INTERNATIONAL	P	2011-03-10	2011-07-05
106000 ING BANK	P	2011-03-22	2011-07-05
640 DEUTSCHE BORSE	P	2011-01-27	2011-06-28
850 BASF SE	P	2009-08-13	2011-06-25
12000 ESPRIT HOLDINGS	P	2011-09-24	2011-05-19
1050 CARREFOUR SA	P	2009-12-15	2011-05-19
360 CIE DE SAINT GOBAIN	P	2010-07-14	2011-05-19
3740 CISCO SYSTEMS	P	2008-04-30	2011-05-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
9400 IPATH EXCHANGE TRADED NOTES	P	2011-03-10	2011-05-02
4690 IPATH EXCHANGE TRADED NOTES	P	2011-02-03	2011-05-02
110000 BP CAPITAL MARKETS	P	2011-03-10	2011-04-19
800 ISHARES INC	P	2008-04-30	2011-04-04
925 VONCERT INT HI DIV	P	2010-07-08	2011-03-22
42000 DEFENDER VONTI	P	2010-12-16	2011-03-22
25000 EUROPAISCHE	P	2009-09-17	2011-03-10
30000 LAND BERLIN	P	2008-11-17	2011-03-10
25000 CANADA	P	2010-05-07	2011-03-10
5000 FRANCE TELECOM	P	2010-07-27	2011-03-10
200000 SCHWEDEN	P	2010-05-07	2011-03-10
170000 LAND NORDHEIN WESTFALEN	P	2010-08-03	2011-03-10
3080 ISHARES TRUST S&P 500	P	2008-08-04	2011-03-01
80000 CONOCOPHILLPS	P	2010-10-05	2011-02-03
2300 SPDR S&P 500 ETF	P	2009-12-15	2011-02-03
24000 SIEMENS FINANCIERING	P	2009-10-09	2011-02-03
150000 EUROPAEISCHE	P	2008-06-11	2011-02-03
240000 AUSTRIA EMTN	P	2008-04-30	2011-02-03
11200 INTESA SANPAOLO SPA	P	2008-04-30	2011-01-27
BANCO SANTANDER SALE OF RIGHTS	P	2011-01-17	2011-01-25

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
		3,669	-3,669
40,883		42,965	-2,082
50,913		60,360	-9,447
95,647		100,691	-5,044
32,454		30,179	2,275
30,619		32,329	-1,710
3,208		3,435	-227
3,507		4,095	-588
6,586		6,414	172
3,945		4,084	-139
3,705		2,951	754
4,893		5,002	-109
6,145		6,361	-216
5,866		5,635	231
1,962		1,792	170
185,258		185,599	-341
340		520	-180
659		1,040	-381
2,882		2,952	-70
2,771		2,351	420
2,015		1,967	48
3,297		2,079	1,218
4,248		4,302	-54
3,376		2,666	710
79,893		30,640	49,253
267,800		266,831	969
3,646		4,071	-425
69,410		81,440	-12,030
156,885		150,300	6,585
		13,685	-13,685

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
110,022		88,346	21,676
98,490		105,287	-6,797
103,860		106,153	-2,293
39,338		105,168	-65,830
87,964		62,808	25,156
214,238		140,836	73,402
		17,053	-17,053
94,647		91,008	3,639
110,621		115,021	-4,400
45,664		85,844	-40,180
		30,405	-30,405
117,935		85,590	32,345
83,797		153,177	-69,380
130,304		146,200	-15,896
81,053		79,507	1,546
189,061		191,000	-1,939
		14,996	-14,996
121,047		91,049	29,998
55,972		67,295	-11,323
44,152		63,889	-19,737
72,212		70,009	2,203
71,168		64,679	6,489
64,021		65,693	-1,672
32,084		27,471	4,613
86,825		94,912	-8,087
63,674		66,290	-2,616
53,564		55,403	-1,839
34,299		42,880	-8,581
81,322		73,944	7,378
70,119		73,947	-3,828

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
44,060		41,427	2,633
81,179		64,668	16,511
57,141		60,926	-3,785
57,485		68,438	-10,953
61,593		75,436	-13,843
64,076		66,672	-2,596
67,264		69,703	-2,439
53,051		92,401	-39,350
45,779		55,267	-9,488
68,804		94,969	-26,165
73,332		86,145	-12,813
80,737		133,870	-53,133
58,601		66,358	-7,757
56,540		65,099	-8,559
40,924		43,775	-2,851
80,492		133,250	-52,758
73,988		67,947	6,041
69,143		66,160	2,983
72,579		84,029	-11,450
92,680		85,740	6,940
45,686		47,979	-2,293
56,503		71,474	-14,971
38,069		41,887	-3,818
91,678		54,651	37,027
57,367		70,390	-13,023
69,556		52,608	16,948
73,179		94,885	-21,706
59,326		101,388	-42,062
74,561		113,654	-39,093
87,278		66,695	20,583

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
75,662		72,302	3,360
93,549		35,490	58,059
55,757		64,795	-9,038
57,802		72,639	-14,837
61,400		64,750	-3,350
72,593		108,250	-35,657
28,531		58,557	-30,026
64,861		67,132	-2,271
20,023		41,102	-21,079
31,299		68,447	-37,148
27,999		49,722	-21,723
100,379		136,410	-36,031
56,783		67,992	-11,209
77,938		88,152	-10,214
56,879		58,626	-1,747
51,999		67,728	-15,729
55,812		66,308	-10,496
		10,019	-10,019
59,499		50,070	9,429
61,740		61,824	-84
283,021		302,079	-19,058
359,891		598,382	-238,491
275,018		306,768	-31,750
113,787		126,154	-12,367
188,519		275,504	-86,985
255,295		281,253	-25,958
115,400		110,367	5,033
82,123		82,093	30
216,600		225,900	-9,300
271,048		299,744	-28,696

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
117,070		127,305	-10,235
		14,355	-14,355
132,618		126,420	6,198
		29,645	-29,645
299,720		327,700	-27,980
494,845		433,472	61,373
305,689		46,277	259,412
		322,128	-322,128
42,625		29,415	13,210
69,751		58,926	10,825
36,365		34,568	1,797
16,869		16,752	117
16,741		21,881	-5,140
152,498		151,606	892
49,017		49,178	-161
13,870		12,840	1,030
379,664		372,344	7,320
338,319		316,572	21,747
186,868		175,360	11,508
337,668		334,020	3,648
472,899		383,102	89,797
595,353		543,844	51,509
112,688		113,303	-615
108,669		109,337	-668
46,784		52,492	-5,708
78,864		44,227	34,637
48,038		65,342	-17,304
45,890		51,673	-5,783
23,250		18,748	4,502
61,818		96,118	-34,300

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
282,683		234,945	47,738
214,350		225,353	-11,003
111,155		111,148	7
31,434		35,993	-4,559
103,418		88,094	15,324
59,010		55,234	3,776
42,173		43,595	-1,422
41,376		36,151	5,225
26,019		26,941	-922
6,935		6,764	171
30,625		27,471	3,154
29,186		28,502	684
211,004		188,896	22,108
87,142		89,160	-2,018
298,087		267,599	30,488
26,966		26,489	477
155,850		144,795	11,055
251,198		238,788	12,410
37,387		84,071	-46,684
757			757

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(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	
			-3,669
			-2,082
			-9,447
			-5,044
			2,275
			-1,710
			-227
			-588
			172
			-139
			754
			-109
			-216
			231
			170
			-341
			-180
			-381
			-70
			420
			48
			1,218
			-54
			710
			49,253
			969
			-425
			-12,030
			6,585
			-13,685

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(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	
			21,676
			-6,797
			-2,293
			-65,830
			25,156
			73,402
			-17,053
			3,639
			-4,400
			-40,180
			-30,405
			32,345
			-69,380
			-15,896
			1,546
			-1,939
			-14,996
			29,998
			-11,323
			-19,737
			2,203
			6,489
			-1,672
			4,613
			-8,087
			-2,616
			-1,839
			-8,581
			7,378
			-3,828

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(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	
			2,633
			16,511
			-3,785
			-10,953
			-13,843
			-2,596
			-2,439
			-39,350
			-9,488
			-26,165
			-12,813
			-53,133
			-7,757
			-8,559
			-2,851
			-52,758
			6,041
			2,983
			-11,450
			6,940
			-2,293
			-14,971
			-3,818
			37,027
			-13,023
			16,948
			-21,706
			-42,062
			-39,093
			20,583

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(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	
			3,360
			58,059
			-9,038
			-14,837
			-3,350
			-35,657
			-30,026
			-2,271
			-21,079
			-37,148
			-21,723
			-36,031
			-11,209
			-10,214
			-1,747
			-15,729
			-10,496
			-10,019
			9,429
			-84
			-19,058
			-238,491
			-31,750
			-12,367
			-86,985
			-25,958
			5,033
			30
			-9,300
			-28,696

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(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	
			-10,235
			-14,355
			6,198
			-29,645
			-27,980
			61,373
			259,412
			-322,128
			13,210
			10,825
			1,797
			117
			-5,140
			892
			-161
			1,030
			7,320
			21,747
			11,508
			3,648
			89,797
			51,509
			-615
			-668
			-5,708
			34,637
			-17,304
			-5,783
			4,502
			-34,300

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(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	
			47,738
			-11,003
			7
			-4,559
			15,324
			3,776
			-1,422
			5,225
			-922
			171
			3,154
			684
			22,108
			-2,018
			30,488
			477
			11,055
			12,410
			-46,684
			757

Form 990PF Part XV Line 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*				
AMER COMMITTEE FOR THE WEIZMAN INST633 THIRD AVENUE NEW YORK, NY 10017	NONE	DIRECT	ALTRUISTIC	50,000
KEREN OR INC350 7th AVENUE SUITE 701 NEW YORK, NY 10001	NONE	DIRECT	ALTRUISTIC	25,000
ORT AMERICA INC75 MAIDEN LANE 10TH FLOOR NEW YORK, NY 10038	NONE	DIRECT	ALTRUISTIC	30,000
AMERICAN FRIENDS OF ILAN130 CHURCH STREET 342 NEW YORK, NY 10007	NONE	DIRECT	ALTRUISTIC	100,000
AMERICAN FRIENDS OF YAD EZRA 3470 WILSHIRE BLVD SUITE 1020 LOS ANGELES, CA 90010	NONE	DIRECT	ALTRUISTIC	50,000
AMERICAN FRIENDS OF THE JAFFA INSTI171-06 76TH AVENUE FLUSHING, NY 11366	NONE	DIRECT	ALTRUISTIC	100,000
SCHNEIDER CHILDREN MEDICAL CENTER I295 MADISON AVENUE SUITE 1705 NEW YORK, NY 10017	NONE	DIRECT	ALTRUISTIC	125,000
COUNSELING CENTER FOR WOMEN 317 MADISON AVENUE SUITE 607 NEW YORK, NY 10017	NONE	DIRECT	ALTRUISTIC	30,000
AMERICAN FRIENDS OF MAGEN DAVID ADO888 SEVENTH AVENUE NEW YORK, NY 10106	NONE	DIRECT	ALTRUISTIC	100,000
FRIENDS OF YEMEN ORDE12230 WILKINS AVENUE ROCKVILLE, MD 20852	NONE	DIRECT	ALTRUISTIC	100,000
Total . . . . . ▶ **3a**				710,000

TY 2011 Accounting Fees Schedule

Name: S & J LURJE MEMORIAL FOUNDATION

EIN: 13-6176033

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
IVES & SULTAN	12,011	12,011	12,011	0

TY 2011 Investments Corporate Bonds Schedule

Name: S & J LURJE MEMORIAL FOUNDATION

EIN: 13-6176033

Software ID: 11000144

Software Version: 2011v1.2

Name of Bond	End of Year Book Value	End of Year Fair Market Value
US FIXED INCOME	1,710,553	1,697,945

TY 2011 Investments Corporate Stock Schedule

Name: S & J LURJE MEMORIAL FOUNDATION

EIN: 13-6176033

Software ID: 11000144

Software Version: 2011v1.2

Name of Stock	End of Year Book Value	End of Year Fair Market Value
FOREIGN EXCHANGE	707,348	664,788
COMPLEMENTARY STRUCTURES	190,000	176,663
HARD ASSETS	843,669	764,172
REAL ESTATE & INFRASTRUCTURE	271,861	283,053
HEDGE FUND	2,000,000	2,014,918
EMERGING MARKET EQUITY	1,084,465	922,462
ASIA EX JAPAN EQUITY	605,757	579,409
EAFE EQUITY	1,305,218	1,306,361
US MID CAP EQUITY	970,481	1,027,236
US LARGE CAP EQUITY	3,209,266	3,330,531
UBS		

TY 2011 Other Expenses Schedule

Name: S & J LURJE MEMORIAL FOUNDATION

EIN: 13-6176033

Software ID: 11000144

Software Version: 2011v1.2

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSES	3,000	3,000	3,000	
INVESTMENT ADVISORY FEES	80,434	80,434	80,434	
BANK CHARGES	13,422	13,422	13,422	

TY 2011 Other Income Schedule

Name: S & J LURJE MEMORIAL FOUNDATION

EIN: 13-6176033

Software ID: 11000144

Software Version: 2011v1.2

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS INCOME	500	500	500

TY 2011 Taxes Schedule

Name: S & J LURJE MEMORIAL FOUNDATION

EIN: 13-6176033

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX EXPENSE	19,093	19,093	19,093	
FEDERAL INCOME TAX EXPENSE	2,986			