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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

Treated as a Private Foundation

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

2011

and ending For calendar year 2011 or tax year beginning Name of foundation A Employer identification number 26-1603215 ALBERS-SCHONBERG FOUNDATION, INC. Room/suite B Telephone number Number and street (or P O box number if mail is not delivered to street address) 609-921-6223 43 SCRIBNER COURT City or town, state, and ZIP code C If exemption application is pending, check here PRINCETON, NJ 08540 Initial return of a former public charity D 1. Foreign organizations, check here G Check all that apply: Initial return Amended return Final return Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation H Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here Accrual I Fair market value of all assets at end of year | J | Accounting method: F If the foundation is in a 60-month termination Other (specify) under section 507(b)(1)(B), check here (from Part II, col (c), line 16) 977,767. (Part I, column (d) must be on cash basis.) ▶\$ Part I Analysis of Revenue and Expenses (d) Disbursements (b) Net investment (c) Adjusted net (a) Revenue and (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) for charitable purposes (cash basis only) expenses per books income income N/A Contributions, gifts, grants, etc., received Check X If the foundation is not required to attach Sch. B Interest on savings and temporary cash investments , 3 ¥ 19,600. 19,600 STATEMENT Dividends and interest from securities 8 5a Gross rents SCANINED MAY b Net rental income or (loss) RECEIVED 54,555 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 308,639. 54,555 7 Capital gain net income (from Part IV, line 2) Š 8 Net short-term capital gain Income modifications OGDEN. 10a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) STATEMENT 0 41 11 Other income 74 74,155 196 Total Add lines 1 through 11 0. 0 13 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees 0. STMT 3 2,750 1.375 **b** Accounting fees c Other professional fees 17 Interest 0. 130 3,133 STMT 4 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 0. 14,775 STMT 5 14,859 23 Other expenses Operating 24 Total operating and administrative 20,742 16,280 expenses. Add lines 13 through 23 113,000. 113,000 25 Contributions, gifts, grants paid 26 Total expenses and disbursements 113,000. 133,742 16,280 Add lines 24 and 25 27 Subtract line 26 from line 12: <59,546. a Excess of revenue over expenses and disbursements 57,875 b Net investment income (if negative, enter -0-) N/A C Adjusted net income (if negative, enter -0-) Form 990-PF (2011) LHA For Paperwork Reduction Act Notice, see instructions.

	ALBERS – SCHONBERG FOUNDAT	PION, INC. Beginning of year	26-1 End of y	603215 Page /ear
Part I	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
1 0	Cash - non-interest-bearing	4,999.	43,736.	43,736
	Savings and temporary cash investments		-	
1 -	Accounts receivable ►			
1	Less: allowance for doubtful accounts			
	Pledges receivable			
	Less; allowance for doubtful accounts			
	Grants receivable			
-				
1	Receivables due from officers, directors, trustees, and other			
1	disqualified persons			
1 1	Other notes and loans receivable			
!	Less: allowance for doubtful accounts			
8	Inventories for sale or use			
	Prepaid expenses and deferred charges			
10a	Investments - U.S. and state government obligations			
b	Investments - corporate stock STMT 6	722,473.	624,190.	934,031
C	Investments - corporate bonds			.,,
11	Investments - land, buildings, and equipment basis			
	Less accumulated depreciation			
12	Investments - mortgage loans			
	Investments - other			
	Land, buildings, and equipment: basis ▶			
1	Less accumulated depreciation			
	Other assets (describe ▶			
'3	Other assets (describe >			
16	Total assets (to be completed by all filers)	727,472.	667,926.	977,767
1	Accounts payable and accrued expenses		-	
1	Grants payable			
1	Deferred revenue			
Ι.	· · · · · · · · · · · · · · · · · · ·			
	Loans from officers, directors, trustees, and other disqualified persons Mortgages and other notes payable			
1	· · ·			
22	Other liabilities (describe)			
22	Total liabilities (add lines 17 through 22)	0.	0.	
	Foundations that follow SFAS 117, check here			
	and complete lines 24 through 26 and lines 30 and 31.			
	Unrestricted			
	Temporarily restricted			
1	Permanently restricted			
	Foundations that do not follow SFAS 117, check here			
	and complete lines 27 through 31.			
	Capital stock, trust principal, or current funds	0.	0.	
28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
29	Retained earnings, accumulated income, endowment, or other funds	727,472.	667,926.	
30	Total net assets or fund balances	727,472.	667,926.	
		707 470	667 026	
31	Total liabilities and net assets/fund balances	727,472.	667,926.	·
art I	Analysis of Changes in Net Assets or Fund Ba	alances		
Total	net assets or fund balances at beginning of year - Part II, column (a), line 3	30		
(mus	t agree with end-of-year figure reported on prior year's return)		1	727,472
•	amount from Part I, line 27a		2	<59,546
	increases not included in line 2 (itemize)		3	(
	ines 1, 2, and 3		4	667,926
	eases not included in line 2 (itemize)		5	(
	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	lumn (b), line 30	6	667,926
				Form 990-PF (20

See the Part VI instructions.

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.

Form 990-PF (2011)

113,000.

8 Enter qualifying distributions from Part XII, line 4

Tal Exempt operating foundations described in section 4940(d)(2), check here ▶ and enter WA* on line 1. Date of ruling or determination letter: "Latch easy of letter if necessary-see instructions)		n 990-PF art VI	(2011) ALBERS-SCHONBERG FOUNDATION, II Excise Tax Based on Investment Income (Section 4940)	NC.	<u>.</u>	940(b)	4940	e). or 4	26-	1603	215 nstru	ction	age 4
Date of Juliago or determination letter:)	1				
b Domestic foundations that meet the section 494(b) (equirements in Part V, check here													
cof Part I, Ime 27b c All other domestic bondations enter 2% of line 27b, Exempt foreign organizations enter 4% of Part I, Ime 12, eol. (b). 2 Tax under section 511 (domestic section 4947(a)(1) frusts and taxable foundations only. Others enter -0-) 3 3 5.79. 3 John (Income) lax (domestic section 4947(a)(1) frusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Exempt foreign organizations - sav withheld at source 6 Exempt foreign organizations - sav withheld at Source 6 Tax paid with application for extension of time to the (Form 8869) 8 Enter any penalty for underpayment of estimated tax. Check here in form 220 is attached 9 Tax due. If the total or lines 5 and 5 is more than the total or lines 5 and 5, enter the amount overpaid 10 Overpayment. If line? I've more than the total or lines 5 and 8, enter the amount overpaid 10 Overpayment. If line? I've more litan the total or lines 5 and 8, enter the amount overpaid 10 Overpayment. If line? I've more litan the total or lines 5 and 8, enter the amount overpaid 10 Overpayment. If line? I've more litan the total or lines 5 and 8, enter the amount overpaid 10 Overpayment. If line? I've more litan the total or lines 5 and 8, enter the amount overpaid 10 Overpayment. If line? I've more litan the total or lines 5 and 8, enter the amount overpaid 10 Overpayment. If line? I've more litan the total colleges and the standard and the litan organization and litange the litange and litange and litange and litange and litange and litange and li	b		tic foundations that meet the section 4940(e) requirements in Part V, check here	\mathbf{x}	an	nd enter	1%		1			5	79.
c. All other domestic boundations enter 2% of the 27h, 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-) 3 Add lines 1 sind 2 4 Subtilité A (monne) bit (domestic section 4947(a)(1) trusts and taxable foundations only, Others enter -0-) 5 Tax based on investment is accome. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment is come. Subtract line 4 from line 3. If zero or less, enter -0- 5 Credish7ayments. 2 2011 estimated tax payments and 2010 overpayment credited to 2011 5 Exempt foreign organizations - tax withheld at Source 1 Ex paid with application for extension of time to file (Form 8868) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 5a line organization of the 56 lines organization of extension of time to file (Form 8868) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 5a line organization of the state of the 56 lines organization of extension of the state of the 56 lines organization of extension of time to file (Form 8868) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 5a line organization of the state organization o													
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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 9 Tax due, if the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Total Check from 10 to be: Credited to 2012 estimated tax ▶ 371. Refunded ▶ 10 371. 12 Find the amount of line 10 to be: Credited to 2012 estimated tax ▶ 371. Refunded ▶ 11 Total Check from 10 to be: Credited to 2012 estimated tax ▶ 371. Refunded ▶ 11 Total Check from 10 to be: Credited to 2012 estimated tax ▶ 371. Refunded ▶ 11 Total Check from 10 to be: Credited to 2012 estimated tax ▶ 371. Refunded ▶ 11 Total Check from 10 to be: Credited to 2012 estimated tax ▶ 371. Refunded ▶ 11 Total Check from 10 to be: Credited to 2012 estimated tax ▶ 371. Refunded ▶ 11 Total Check from 10 to the 2012 estimated tax ▶ 371. Refunded ▶ 11 Total Check from 10 total Check from 11 total C			•	6d	1]				
8 Enter any penalty for underpayment of estimated tax. Check here			·						7			9	50.
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Part VII-A Statements Regarding Activities						37	1. Refu	nded 🕨					
any political campaign? b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation with the activities and copies of any materials published or distributed by the foundation with the activities and copies of any materials published or distributed by the foundation with the activities and copies of any materials published or distributed by the foundation with the activities and copies of any materials published or distributed by the foundation with the activities and copies of any materials published or distributed by the foundation with the series of any materials published or distributed by the foundation during the year? 10 the foundation negaged in any activities that have not previously been reported to the IRS? 11 "Yes," attach a detailed description of the activities 12 X 12 X 13 X 4a Did 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 are vertically activities that have unrelated business gross income of \$1,000 or more during the year? 14 Yes," attach the state return on Form 990-T for this year? 15 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 16 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 18 By language in the governing instrument, or 19 By state legislation that effectively amends the governing instrument so that no							- 1			<u></u>			
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b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities © Did the foundation file Form 1120-PDL for this year? In the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► S ○ . (2) On foundation managers. ► \$ ○ . Entire the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ ○ . 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 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 A Did the foundation have unrelated business gross income of \$1,000 or more during the year? If "Yes," attach the statement required by General Instruction T Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: ■ 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, 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, 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? ■ Did the nanswer is "Yes" to line 7, has the foundation furnished a copy of form 990-PF to the Altorney General (or designate) of each state as required by General Instruction G? If "No,						•	•				1a	-	X
## 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 © Did the foundation file Form 1120-POL for this year? © Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ © . (2) On foundation managers. ► \$ 0. © Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0. 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? ##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? ##Yes," attach a conformed copy of the changes 4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? ##Yes," attach the statement required by General Instruction ### 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? Did the foundation have at least \$5,000 in assets at any time during the year? ##Yes," complete Part II, col. (c), and Part XV. ### If the states to which the foundation reports or with which it is registered (see instructions) #### It 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 ##### It 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 t	b		· · ·	es (se	e in	nstructio	ns for de	finition)?			1b		
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NJ 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 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)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses STMT 7 10 X	•		· · · · · · · · · · · · · · · · · · ·								<u> </u>		
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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) of each state as required by General Instruction G? If "No," attach explanation 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)? 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 STMT 7 10 X	-		Secret to million and realisation reports of million it to registered (and motionalist	-, -	_			-]		
of each state as required by General Instruction G? If "No," attach explanation 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)? 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 STMT 7 10 X	h		nswer is "Yes" to line 7, has the foundation furnished a conv of Form 990-PF to the Att	ornev	/ Ge	eneral (c	r designa	ite)					
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)? 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 STMT 7 10 X	•			y	,		. addigite	,			8h	x	
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 STMT 7 10 X	9			tion 4	94:	2(1)(3) n	r 4942/i\	(5) for cale	endar				
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses STMT 7 10 X	•							, 541			9		х
	10							sses C	тмт	7 י		Х	
	<u> </u>		attack a solicount		a/!								2011)

	990-PF (2011) ALBERS-SCHONBERG FOUNDATION, INC. 26-160	<u> 3215</u>		Page 5
	art VII-A Statements Regarding Activities (continued)	77		
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		<u>X</u>
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			7.
4.0	If "Yes," attach statement (see instructions)	12	37	<u>X</u>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X.	
4.4	Website address ► N/A The books are in care of ► ALBERS-SCHONBERG FOUNDATION, INC. Telephone no. ► 609-9	21 6	222	
14	The books are in care of ► ALBERS-SCHONBERG FOUNDATION, INC. Telephone no. ► 609-9 Located at ► 43 SCRIBNER COURT, PRINCETON, NJ ZIP+4 ►0		443	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	7740	_	
13	and enter the amount of tax-exempt interest received or accrued during the year	NT.	/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	No
	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	art 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?	į		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(5) Transfer any income or assets to a disqualified person (or make any of either available			
	for the benefit or use of a disqualified person)?			
	(6) Agree to pay money or property to a government official? (Exception Check "No"			
	If the foundation agreed to make a grant to or to employ the official for a period after			
	termination of government service, if terminating within 90 days.)	1 1		
D	olf 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)? Occupations solving on a current notice regarding disaster assistance (see instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here			
·	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		х
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	-10		
-	defined in section 4942(j)(3) or 4942(j)(5)):			
а	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 X No			
	If "Yes," list the years			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect			
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach			
	statement - see instructions.) N/A	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 1		
3a	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
	during the year?			
b	olf "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.) N/A	3b		1
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	4		v
	had not been removed from jeopardy before the first day of the tax year beginning in 2011?	1 4b 1 mm 990	-DF	2011\
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orm 990-PF (2011) ALBERS-SCHONBERG FOUNDAT			<u> 26-16032</u>	15 Page 6
Part VII-B Statements Regarding Activities for Which I	orm 4720 May Be F	Required (contin	ued)	
5a During the year did the foundation pay or incur any amount to:	 :			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1 4945(e))?	☐ Ye	s X No	
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indire	ectly,		
any voter registration drive?		Ye	es 🗶 No	
(3) Provide a grant to an individual for travel, study, or other similar purposes	?	Ye	es X No	
(4) Provide a grant to an organization other than a charitable, etc., organizatio				1 1
509(a)(1), (2), or (3), or section 4940(d)(2)?		Ye	s X No	1 1
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f	or		
the prevention of cruelty to children or animals?	, , , , , , , , , , , , , , , , , , , ,		s X No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	der the exceptions described i			
section 53,4945 or in a current notice regarding disaster assistance (see instru			N/A	5b
Organizations relying on a current notice regarding disaster assistance check h			▶ □	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi		ined		
expenditure responsibility for the grant?		//A	s No	
If "Yes," attach the statement required by Regulations section 53 494		.,		i
6a Did the foundation, during the year, receive any funds, directly or indirectly, to			İ	
a personal benefit contract?	pay promiums on	□ v.	es X No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	erennal henefit contract?	16		6b X
If "Yes" to 6b, file Form 8870	ersonar benefit contract.		 '	A
•	holter transaction?		s X No	
7a At any time during the tax year, was the foundation a party to a prohibited tax s		16		7b
b If 'Yes,' did the foundation receive any proceeds or have any net income attributions. About Officers, Directors, Trust		nogoro Highly		70
Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors	ees, Foundation ivia	nagers, nigni	,	
List all officers, directors, trustees, foundation managers and their	compensation			
Elst all Officers, directors, trustees, foundation managers and their	(b) Title, and average	(c) Compensation	(d) Contributions to	(e) Expense
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
GEORGE E. ALBERS-SCHONBERG	TRUSTEE			
43 SCRIBNER COURT				
PRINCETON, NJ 08540	1.00	0.	0.	0.
	PRESIDENT	J		
13 SCRIBNER COURT				
PRINCETON, NJ 08540	1.00	0.	0.	0.
	TRUSTEE			
43 SCRIBNER COURT	11100122			
PRINCETON, NJ 08540	1.00	0.	0.	0.
RINCETON, NO 00340	1.00			<u> </u>
2 Compensation of five highest-paid employees (other than those inc	luded on line 1) If none.	enter "NONE."	<u></u>	
	(b) Title, and average	1	(d) Contributions to	(e) Expense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deterred	(e) Expense account, other allowances
MONTE	devoted to position		compensation	allowalices
NONE				
				
		 		
	-			
		 		
	ļ			
		<u></u>	L	L
Fotal number of other employees paid over \$50,000			<u> </u>	0
			Form 9	990-PF (2011)

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)	
Five highest-paid independent contractors for professional services. If none, enter "NONE."	
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NONE	
Total number of others receiving over \$50,000 for professional services	•
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
N/A	
2	
	_
3	
	_
	\dashv
Part IX-B Summary of Program-Related Investments	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	-
2	
All other program related investments. Can instructions	
All other program-related investments. See instructions.	
Total. Add lines 1 through 3	Form 990-PF (201
	FORM 330-FF (201)

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations,	see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
	Average monthly fair market value of securities	1a	981,241.
	Average of monthly cash balances	1b	981,241. 52,804.
C	Fair market value of all other assets	1c	
ď	Total (add lines 1a, b, and c)	1d	1,034,045.
_	Reduction claimed for blockage or other factors reported on lines 1a and		
Ī	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,034,045.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	15,511.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,018,534.
6	Minimum investment return. Enter 5% of line 5	6	50,927.
	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	nd certain	
1	Minimum investment return from Part X, line 6	1	50,927.
2a	Tax on investment income for 2011 from Part VI, line 5		
b	Income tax for 2011. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	579.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	50,348.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	50,348.
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	50,348.
_	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	.	112 000
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	113,000.
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:		
а	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	110 000
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	113,000.
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	5	579. 112,421.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 4940(e) reduction of tax in those years.	qualifies fo	r the section

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from i	Part XI,			
line 7				50,348.
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	y, to 2011:			
a From 2006				
b From 2007				
c From 2008				
d From 2009 15	708.			
e From 2010 31	,507.			
f Total of lines 3a through e	47,215			
4 Qualifying distributions for 2011 from	m			
Part XII, line 4: ► \$ 113	,000.			
a Applied to 2010, but not more than I	line 2a		0.	
b Applied to undistributed income of p	prior			
years (Election required - see instruc	ctions)	0.		
c Treated as distributions out of corpu	ıs			
(Election required - see instructions)	0			
d Applied to 2011 distributable amoun	nt			50,348.
e Remaining amount distributed out of	f corpus 62,652	•		
5 Excess distributions carryover applied to 2 (If an amount appears in column (d), the sai must be shown in column (a))	2011 0			0.
6 Enter the net total of each column a indicated below:	as			
2 Corpus Add lines 3f, 4c, and 4e Subtract	line 5 109,867	•		
b Prior years' undistributed income. S				
line 4b from line 2b		0.		
c Enter the amount of prior years'				
undistributed income for which a no				
deficiency has been issued, or on what the section 4942(a) tax has been pre				
assessed	eviously	0.		
d Subtract line 6c from line 6b. Taxabl	le			
amount - see instructions		0.		
e Undistributed income for 2010. Sub	tract line			
4a from line 2a. Taxable amount - se	ee instr.		0.	
f Undistributed income for 2011. Sub	etract			
lines 4d and 5 from line 1. This amo	ount must			
be distributed in 2012				0.
7 Amounts treated as distributions ou	it of			
corpus to satisfy requirements impo	osed by			
section 170(b)(1)(F) or 4942(g)(3)	0			
8 Excess distributions carryover from	2006 ·			
not applied on line 5 or line 7	0	•		
9 Excess distributions carryover to 2				
Subtract lines 7 and 8 from line 6a	109,867	•		
10 Analysis of line 9:				1
a Excess from 2007				}
b Excess from 2008			1	
	5,708.			
	L,507.			
e Excess from 2011 6 2	2,652.			
				Form 990-PF (2011)

Form 990-PF (2011) ALBERS - Part XIV Private Operating Fo	SCHONBERG F		INC.	-	-1603215 Page 10
			-A, question a)	N/A	
1 a If the foundation has received a ruling of foundation, and the ruling is effective for		· · · · -	_		
b Check box to indicate whether the found	•	~	ın section	4942(j)(3) or [4942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
investment return from Part X for		,	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \		
each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII,	* 14-7				
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 Info		to this part only	if the founds	tion had \$5 000 c	r more in essets
at any time during t			ii tile loulida	tion nau \$5,000 C	illore ili assets
1 Information Regarding Foundation					
a List any managers of the foundation wh		than 2% of the total con	tributions received b	by the foundation before t	the close of any tax
year (but only if they have contributed n	nore than \$5,000). (See s	section 507(d)(2).)			
JOYCE M. ALBERS-SCHO					· · · · · · · · · · · · · · · · · · ·
 b List any managers of the foundation who other entity) of which the foundation has 			(or an equally large	portion of the ownership	of a partnership or
NONE	<u>-</u>				
2 Information Regarding Contributi	on, Grant, Gift, Loan	, Scholarship, etc P	rograms:		
Check here ► X if the foundation o			-	does not accept unsolicite	ed requests for funds. If
the foundation makes gifts, grants, etc.	(see instructions) to indi	viduals or organizations	under other conditio	ns, complete items 2a, b	, c, and d.
a The name, address, and telephone num	ber of the person to who	m applications should be	e addressed:		
b The form in which applications should b	e submitted and informa	ation and materials they s	should include:		
c Any submission deadlines;					
d Any restrictions or limitations on awards	s, such as by geographic	al areas, charitable fields	, kınds of ınstitution	s, or other factors:	
,	. , , , , , , , , , , , , , , , , , , ,				

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During th		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	or substantial contributor	100,000		
a raid daning the year				
BISHOPS ANNUAL APPEAL - TRENTON	NONE	EXEMPT	GENERAL	
701 LAWRENCEVILLE ROAD				10,000
LAWRENCEVILLE, NJ 08638				10,000
DOUGLAS ANNUAL FUND	NONE	EXEMPT	GENERAL	
181 RYDERS LANE				35,000,
NEW BRUNSWICK, NJ 08901				35,000,
GEORGE STREET PLAYHOUSE	NONE	EXEMPT	GENERAL	
9 LIVINGSTON AVE				10.000
NEW BRUNSWICK, NJ 08901				10,000
AMERICAN RED CROSS	NONE	EXEMPT	ENERAL	
PO BOX 4002018				10.000
DES MOINES, IA 50340-2018		-		10,000
METROPOLITAN OPERA	NONE	EXEMPT	GENERAL	
LINCOLN CENTER				
NEW YORK NY 10023 Total SEE C	CONTINUATION SHE	<u> </u> RTT (S)	▶ 3a	8 000 113 000
b Approved for future payment	CONTINUATION DILL		7 00	115,000
• • • • • • • • • • • • • • • • • • • •				
NONE				
-				
		1		
			-	
			•	
Tabl			▶ 3b	
Total			F. 30	orm 990-PF (2011

er gross amounts unless otherwise indicated.	Official Date		I Excluded b	by section 512, 513, or 514	1.1
	(a) Business	(b) Amount	(C) Exclu- sion	(d)	(e) Related or exempt
Program service revenue:	code	Amount	code	Amount	function income
a					
b					
C					
d	l l				
e					
g Fees and contracts from government agencies					
Membership dues and assessments					
Interest on savings and temporary cash					
investments				10 600	
Dividends and interest from securities			14	19,600.	
Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
Net rental income or (loss) from personal					
property					
Other investment income					
Gain or (loss) from sales of assets other					
than inventory			18	54,555.	
Net income or (loss) from special events					
Gross profit or (loss) from sales of inventory					
Other revenue:					
a OTHER INCOME			14	41.	<u> </u>
b	1				
C	T I				
d					
e			_	E4 106	
Subtotal. Add columns (b), (d), and (e)			0.	74,196.	
Total. Add line 12, columns (b), (d), and (e)				13	74,196
e worksheet in line 13 instructions to verify calculation	ns.)	-			
art XVI-B Relationship of Activit	ies to the Accon	plishment of	Exempt P	urposes	
ne No Explain below how each activity for which	h income is reported in c	olumn (e) of Part XV	/I-A contributed	i importantly to the accomp	olishment of
▼ the foundation's exempt purposes (other	r than by providing funds	s for such purposes)			
			<u></u>		
	, ,,,,,,,				
					

Form **990-PF** (2011)

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Form 990-PF (2011) ALBERS-SCHONBERG FOUNDATION, INC. 26-1603215 Page 13 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable

		Exempt Organ	izations					
1	Did the org	janization directly or indir	ectly engage in any of the following	g with any other organizatio	n described in section 501(c) of		Yes	No
	the Code (other than section 501(c)	(3) organizations) or in section 52	7, relating to political organi	izations?			
а	Transfers t	from the reporting founda	ition to a noncharitable exempt org	ganization of:				
	(1) Cash					1a(1)		<u>X</u>
	(2) Other	assets				1a(2)		X
	Other trans							
	• •	of assets to a noncharital				1b(1)	-	X
	(- <i>i</i>		ncharitable exempt organization			1b(2)	<u> </u>	X
	` '	l of facilities, equipment,	or other assets			1b(3)	<u> </u>	X
	• •	oursement arrangements				1b(4)	 	X
		or loan guarantees				1b(5)	-	X
			mbership or fundraising solicitation			1b(6)		X
			iling lists, other assets, or paid emp		veve about the four market value of the goods	other acc	L	
a		-		· · · · · · · · · · · · · · · · · · ·	vays show the fair market value of the goods, e in any transaction or sharing arrangement,		ocio,	
		• • •	other assets, or services received.	eu 1655 tilali iali illaiket valu	e ili aliy transaction or sharing arrangement,	311044 111		
(a) L	<u>`</u>	(b) Amount involved	(c) Name of noncharitable	exempt organization	(d) Description of transfers, transactions, and	sharing ar	rangeme	ents
(-,-		(2) /	N/A		(-,			
			11/11					
			-					
		······································						
2a		•	tly affiliated with, or related to, one	· · ·	zations described	—	r 	n
			than section 501(c)(3)) or in sect	ion 527?	L	Yes	LX	∐No
b	If "Yes," co	mplete the following sch		(L) True of average steep	(a) Description of relation	ahın		
	-	(a) Name of org	anization	(b) Type of organization	(c) Description of relations	snip		
		N/A						
				7				
	Under	penalties of periury. I declare	that I have examined this return, includin	a accompanying schedules and	statements, and to the best of my knowledge			
Sig	l and he				nation of which preparer has any knowledge	lay the IRS turn with th	ne prepa	rer
He		Chanse Mi	lun-Shouleic	15/10/12	PRESIDENT	X Yes	·	No
	1 🗲	ature of officer or trustee	1	Date	Title			J 110
	7	Print/Type preparer's na			Date Check If PTIN			
					/ / self- employed			
Pa	id	CONRAD L.	DRUKER) 1 2		0168	227	,
	eparer		CADIEN, P.C.		Firm's EIN ► 22-3			
	e Only	Tam Shame First	CLEDILLY LICE			_,_,		
		Firm's address > P.	O. BOX 7648					
	PRINCETON, NJ 08543-7648				Phone no. 609 -	-689-	<u>970</u>	0

123622 12-02-11

Form **990-PF** (2011)

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Purpose of grant or contribution Foundation show any relationship to Amount status of any foundation manager or substantial contributor Name and address (home or business) recipient PRINCETON HEALTH SYSTEM FOUNDATION NONE EXEMPT GENERAL 3626 US HIGHWAY 1 5,000. PRINCETON NJ 08540 NONE GENERAL PRINCETON SYMPHONY ORCHESTRA EXEMPT PO BOX 250 30,000. PRINCETON, NJ 08542 NEW YORK UNIVERSITY-STERN NONE EXEMPT GENERAL PO BOX 29303 5,000. NEW YORK NY 10117-0275 40 000 Total from continuation sheets

5 13 (ses for Tax on Investment Income	20 100	75215 TAGE 1 01 Z
• 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	describe the kind(s) of property solo	d e n real estate	(b) How acquired (c) Date acquired (d) Date sold
	ick warehouse; or common stock, 20	P - Purchase D - Donation (mo., day, yr.) (mo., day, yr.)	
1a WAL MART		02/22/1002/17/11	
b GENERAL MOTORS			11/18/10/03/01/11
c APOLLO GLOBAL I	MANAGEMENT LLC		03/29/1106/14/11
d AMGEN INC	E E E E E E E E E E E E E E E E E E E		01/04/1003/04/11
e DEVON ENERGY CO	ORPORATION		01/02/08/03/04/11
	ORATION OF AMERI	CA	09/29/0803/04/11
9 UNUM GROUP			01/02/0803/04/11
h MERCK & CO			VARIOUS 03/07/11
LABORATORY COR	PAMER		01/26/1003/07/11
MERCK & CO			VARIOUS 03/17/11
k LABORATORY COR	P AMER_		01/26/1006/06/11
TORCHMARK CORP			01/06/1006/06/11
	L LIQUID RESERVE	S	06/01/1006/24/11
n ACCENTURE PCL	· · · · · · · · · · · · · · · · · · ·		04/30/1007/01/11
O CABOT OIL & GA	S CORP		01/14/1008/01/11
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 11,024.		10,723.	301.
b 6,654.		6,600.	54.
c 8,178.		9,500.	<1,322.>
d 31,378.		34,251.	<2,873.>
e 22,965.		22,922.	43.
f 17,256.		14,832.	2,424.
g 15,883.		14,124.	1,759.
h 25,936.		10,683.	15,253.
8,924.		7,337.	1,587.
9,711.		4,006.	5,705.
k 9,984.		7,336.	2,648.
16,467. m 57,732.		12,794. 57,732.	3,673.
10 005		8,788.	3,217.
$\frac{n}{0}$ $\frac{12,005}{7,128}$.		4,374.	2,754.
	ig gain in column (h) and owned by t		(I) 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	Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			301.
b			54.
С			<1,322.>
d			<2,873.>
e			43.
f			2,424.
g			1,759.
h			15,253.
1			1,587.
<u></u>			5,705.
k			2,648.
<u> </u>			3,673.
<u>m</u>			0.
<u>n</u>			3,217. 2,754.
0		L	2,754.
2 Capital gain net income or (net ca	pital loss) { If gain, also enter "-0	r in Part I, line 7)-" in Part I, line 7	2
If gain, also enter in Part I, line 8,		nd (6):	
If (loss), enter "-0-" in Part I, line 8	j	<u></u>	3

Part IV Capital Gains and Lo	sses for Tax on Investment Income				
(a) List and	describe the kind(s) of property solorick warehouse; or common stock, 20		(b) How acquired P - Purchase D - Donation	(mo., day, yr.) ((d) Date sold mo., day, yr.)
1a DEVON ENERGY C	ORPORATION			09/29/101	1/18/11
	BUSINESS MACHINE	S CORP		VARIOUS 1	1/18/11
c MERCK & CO	•			VARIOUS 1	1/18/11
d XEROX CORP				09/29/081	1/18/11
е		-			
f					
g					
_ 					
- " 1				•	

<u></u> k					
_ <u>K</u>			 		
<u>'</u>					
					
n					
(e) Gross sales price	(f) Depreciation allowed	(g) Cost or other basis plus expense of sale		Gain or (loss) us (f) minus (g)	
	(or allowable)		(e) hi	as (i) iiiiius (g)	100
a 9,971.		9,783.			188.
b 9,468.		1,101.			8,367.
c 21,463.		8,013.			13,450.
d 6,512.		9,185.			<2,673.>
<u>e</u>					
<u>f</u>					
g	:				
h					
1					
1					
k					
I					
m					
n					
0					
	ng gain in column (h) and owned by t	the foundation on 12/31/69	(I) Loss	ses (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	Gains (excess o	f col. (h) gain over c ot less than "-0-")	ol. (k),
		, , , , , , , , , , , , , , , , , , ,	<u> </u>		188.
<u>a</u>			 		8,367.
<u>b</u>	-				13,450.
<u>C</u>			-		<u>13,450.</u> <2,673.
d				-	<u> </u>
<u>e</u>					
<u>f</u>					
9					
h					
1					_
<u></u>					
<u>k</u>					
1					
m			<u> </u>		<u> </u>
n					
0					
		5 5			
2 Capital gain net income or (net c	apital loss) { If gain, also enter -0	in Part I, line 7	2		54,555.
3 Net short-term capital gain or (lo If gain, also enter in Part I, line 8	iss) as defined in sections 1222(5) an	iu (o):			
If (loss), enter "-0-" in Part I, line of		ŢÌ	3	N/A	
1.000), 51101 0 1111 4111, 11110	-		<u> </u>		

FORM 990-PF DIVIDENT	OS AND	INTER	EST	FROM	SECU	JRITIES	STATEMENT	1
			<u></u>		CAI	PITAL GAINS	COLUMN (A	.)
SOURCE		GROSS	AMO	UNT		DIVIDENDS	AMOUNT	
RIDGE CLEARING	-		19,	600.		0.	19,6	00.
TOTAL TO FM 990-PF, PART I, I	LN 4		19,	600.		0.	19,6	00.
FORM 990-PF	0	THER I	NCON	1E			STATEMENT	2
DESCRIPTION			REV	(A) ENUE BOOKS	5	(B) NET INVEST- MENT INCOME		
OTHER INCOME					41.	0	•	
TOTAL TO FORM 990-PF, PART I	, LINE	11			41.	0	•	
FORM 990-PF	AC	COUNTI	NG I	FEES			STATEMENT	3
DESCRIPTION	EXPE	A) NSES BOOKS		(B) INVI IT INC		(C) ADJUSTED NET INCOM		
PROFESSIONAL FEES	•	2,750.		1,	, 375	•	0.	
TO FORM 990-PF, PG 1, LN 16B		2,750.		1,	, 375	•		0.
FORM 990-PF		TAXES			STATEMENT 4			
DESCRIPTION	EXPE	A) NSES BOOKS		(B) T INVI NT INC				
FOREIGN TAX FEDERAL TAX	_	130. 3,003.			130			0.
TO FORM 990-PF, PG 1, LN 18		3,133.			130	•		0.

FORM 990-PF	OTHER E		STATEMENT	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		
INVESMENT ADV FEES MISCELLANEOUS EXPENSE CONSUMER AFFAIRS LICENSE ANNUAL REPORT	14,775. 29. 30. 25.	0 .	•	0 0 0 0
TO FORM 990-PF, PG 1, LN 23	14,859.	14,775	•	0
FORM 990-PF	CORPORAT			STATEMENT FAIR MARKET
DESCRIPTION ————— INVESTMENTS		B(OOK VALUE 624,190.	934,031
TOTAL TO FORM 990-PF, PART II, LINE 10B				934,031
	F SUBSTANTIA PART VII-A,	L CONTRIBUTOR	RS	STATEMENT
NAME OF CONTRIBUTOR	ADDR	ESS		
JOYCE ALBERS-SCHONBERG	43 S	CRIBNER COUR	r	

PRINCETON, NJ 08540