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Department of the Treasury

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

OMB No 1545-0052

internal l	Revenu	e Service Note. The foundation may be at	bie to use a copy of this return	to satisfy state it	sporting requi	ements	
		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	and ending		Λ	vou dontification	
	of foun				A Emplo	yer identification number	
		Robert and Gail Katz Family			26-	-3323920	
Numb	unc	lation street (or P O box number if mail is not delivered to street address)	Ro	om/suite		one number (see instructions)
		Bloomfield Woods Court	1			3-332-6653	
		state, and ZIP code			C If exem	aption application is pending,	check here
<u>We</u>	st	Bloomfield MI 48323			• II CACII	phon application to perion 9,	• -
G Ch	eck a	li that apply 🔲 Initial return 🔲 Initial retu	rn of a former public ch	narity	D 1. For	eign organizations, check hei	re ▶ ∐
		Final return Amended				eign organizations meeting th	- I
		Address change Name cha	ange		859	% test, check here and attach	computation
H Ch	eck ty	pe of organization X Section 501(c)(3) exempt private	e foundation			te foundation status was term	inated under
Se	ection	4947(a)(1) nonexempt charitable trust Other taxab	le private foundation		section	1 507(b)(1)(A), check here	
1 Fair	r mark	cet value of all assets at J Accounting method	X Cash Acc	rual		oundation is in a 60-month ter	► I I
end	l of ye	ar (from Part II, col (c), Other (specify)			under	section 507(b)(1)(B), check he	ere
line	16)	• \$ 45,477 (Part I, column (d) must	be on cash basis)				(d) Disbursements
Par	rt I	Analysis of Revenue and Expenses (The total of	(a) Revenue and expenses per	(b) Net inv		(c) Adjusted net	for charitable
		amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))	books	incon	ne	ıncome	purposes (cash basis only)
$\neg \tau$	1	Contributions, gifts, grants, etc , received (attach schedule)	41,124				
	2	Check ▶ X If the foundation is not required to attach Sch B					
	3	Interest on savings and temporary cash investments	4		4	4	
	4	Dividends and interest from securities	472		472	472	
	5a	Gross rents				·····	
ø	b	Net rental income or (loss)					
2	6a	Net gain or (loss) from sale of assets not on line 10 Stmt 1	22,096				
Revenue	b	Gross sales price for all assets on line 6a 48,240					
& ∣	7	Capital gain net income (from Part IV, line 2)			0		***
- 1	8	Net short-term capital gain				0	
	9	Income modifications					
1	10a	Gross sales less returns & allowances					
	b	Less Cost of goods sold	 				
	С	Gross profit or (loss) (attach schedule)					
	11	Other income (attach schedule)	63,696		476	476	
-	12_	Total. Add lines 1 through 11	03,896	 	470	470	
S	13	Compensation of officers, directors, trustees, etc					
enses	14	Other employee salaries and wages			-		
be	15	Pension plans, employee benefits Legal fees (attach schedule)					
Ш	16a b	Accounting fees (attach_schedule)					
Ş		Other professional/fees fattach schedule) Stmt 2	150		75		75
ä	17	Other professional/(ses (attach schedule) Stmt 2 Interest					
st	180	Taxes (attach schedule) (see issuructions)					
<u> </u>	246	Dep (Botátion (átjac) မြတ်မြေdule အာ့ရီ depletion					
Adm	202	Occupancy 🔀					
` <u> </u>	20-	Travel genterences, and meetings					
ַ בֻּ	22	Printing and publications					
5	23	Other expenses (att sch) Stmt 3	20	<u> </u>	10		10
Operating	24	Total operating and administrative expenses.			= =	_	
Operating and Administrative Exp		Add lines 13 through 23	170		85	0	
ا م	25	Contributions, gifts, grants paid	47,127				47,127
₹	26	Total expenses and disbursements. Add lines 24 and 25	47,297	1	85	0	47,212
	27	Subtract line 26 from line 12	16 300				
	а	Excess of revenue over expenses and disbursements	16,399	'	391		
	ь	Net investment income (if negative, enter -0-)		+	391	476	
	c	Adjusted net income (if negative, enter -0-)	1	<u></u>		3	Form 990-PF (2011

Fo	rm 990	PF(2011) The Robert and Gail Katz Family	26-3323920)	Page 2
			Beginning of year	End of	year
- 1	Part II	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
Т	1 .	Cash—non-interest-bearing	4,687	5,663	
-	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
- 1	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
-	5	Grants receivable			
Ì	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons (attach schedule) (see			
		instructions)			
	7	Other notes and loans receivable (att schedule)		1	
		Less allowance for doubtful accounts ▶ 0			
ध	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
ĕ	10a	Investments—U S and state government obligations (attach schedule)	10 221	22.754	45,477
	b	Investments—corporate stock (attach schedule) See Stmt 4	18,331	33,754	45,411
	С	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis	!		
		Less accumulated depreciation (attach sch.) ▶		-	
	12	Investments—mortgage loans		-	
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis			
-		Less accumulated depreciation (attach sch.)			
	15	Other assets (describe)			
	16	Total assets (to be completed by all filers—see the	23,018	39,417	45,477
_	17	Instructions Also, see page 1, item l) Accounts payable and accrued expenses		<u> </u>	
	18	Grants payable			
S		Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
abi	21	Mortgages and other notes payable (attach schedule)			
Ë	22	Other liabilities (describe >			
	23	Total liabilities (add lines 17 through 22)	0	0	
-		Foundations that follow SFAS 117, check here			
Ś		and complete lines 24 through 26 and lines 30 and 31.			
၁င	24	Unrestricted			
Net Assets or Fund Balances	25	Temporarily restricted			
ä	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here			
正		and complete lines 27 through 31.			
ō	27	Capital stock, trust principal, or current funds	23,018		
iets	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
ASS	29	Retained earnings, accumulated income, endowment, or other funds		39,417	
et/	30	Total net assets or fund balances (see instructions)	23,018	39,417	
Ž	31	Total liabilities and net assets/fund balances (see			
_		instructions)	23,018	39,417	
_	Part				
•		I net assets or fund balances at beginning of year—Part II, column (a), line 30 (mi	ust agree with	[_	00.040
		of-year figure reported on prior year's return)		1	23,018
:		r amount from Part I, line 27a		2	16,399
		er increases not included in line 2 (itemize)		3	20 417
		lines 1, 2, and 3		4	39,417
		reases not included in line 2 (itemize)	(h) line 30	6	39,417
_	6 Tota	I net assets or fund balances at end of year (line 4 minus line 5)—Part II, column	(D), line 30		Form 990-PF (2011

	ert and Gail Katz F		26-3323920)	Page 3
(a) List and describ	the kind(s) of property sold (e.g., real estate, ehouse, or common stock, 200 shs MLC Co.)	ent income	(b) How acquired P—Purchase	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a N/A			D—Donation	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	(***)
b					
С	2232				
d					
<u>e</u>	-		<u> </u>	<u> </u>	
(e) Gross sales price	(f) Depreciation allowed (or allowable)	, , ,	r other basis ense of sale		ain or (loss) s (f) minus (g)
<u>a</u>	_				
_b					
d d					
e				_	
	gain in column (h) and owned by the f	oundation on 12/31/	69	(I) Gains (C	Col (h) gain minus
(i) F M V as of 12/31/69	(J) Adjusted basis as of 12/31/69	(k) Exces	ss of col (ı) I (j), ıf any	col (k), but i	not less than -0-) or (from col (h))
_a					
_b					
<u>c</u>					
<u>d</u>			 -		
е	If gain, also enter in	Port Line 7		 	
2 Capital gain net income or (net ca	pital loss) If (loss), enter -0- in			2	
3 Net short-term capital gain or (loss	s) as defined in sections 1222(5) and (_			
	column (c) (see instructions) If (loss),	_			
Part I, line 8		<u>_</u>		3	
Part V Qualification Un	der Section 4940(e) for Reduc	ced Tax on Net	Investment Inc	ome	
(For optional use by domestic private	foundations subject to the section 4940	0(a) tax on net inves	tment income)		
If section 4940(d)(2) applies, leave this	s part blank				
Was the foundation liable for the secti	on 4942 tax on the distributable amour	nt of any year in the	hase period?		Yes X No
	fy under section 4940(e) Do not comp		base periou.		1es <u>zs</u> 140
	ach column for each year, see the inst	i	ing any entries		
(a)	(b)	Jacob Barara Mark	(c)	T	(d)
Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distribution:	s Net valu	e of noncharitable-use ass	ets (col (Distribution ratio b) divided by col. (c))
2010	52	2,132			
2009	28	, 682			
2008					
2007					
2006	<u></u>				
				1.1	
2 Total of line 1, column (d)		luna O hu E an hu tha		2	
_	-year base period—divide the total on		•	3	
number of years the foundation ha	as been in existence if less than 5 year	15		13	
4 Enter the net value of noncharitah	le-use assets for 2011 from Part X, line	e 5		4	0
4 Citter the fiet value of fielionalitae	ne add added for 2011 from t are X, in-				
5 Multiply line 4 by line 3				5	
6 Enter 1% of net investment incom	e (1% of Part I, line 27b)			6	4
7 Add lines 5 and 6				7	4
					4 80 80 8
8 Enter qualifying distributions from				8	47,212
	line 7, check the box in Part VI, line 1	b, and complete that	t part using a 1% tax	rate See the	
Part VI instructions					5 990-PF (2011

	990-PF (2011) The Robert and Gail Katz Family 26-3323920					Pa	ge 4
	rt VI · 'Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instr	uctions)					
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 instruction	ns)					
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check	▶⊢	1				4
	here ▶ X and enter 1% of Part I, line 27b	- 11					
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of	_J					
	Part I, line 12, col (b)						_
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	<u> </u>	2				_0
3	Add lines 1 and 2	L	3				4
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	L	4	_			0
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	<u> </u>	5				4
6	Credits/Payments						
а	2011 estimated tax payments and 2010 overpayment credited to 2011 6a 6a						
b	Exempt foreign organizations—tax withheld at source 6b						
С	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	L	7				
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	L	8				
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	▶ L	9	_			4
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 ▶ Refund	led ▶	11				
	art VII-A Statements Regarding Activities						
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it			L		Yes	No
	participate or intervene in any political campaign?				1a		<u>X</u>
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)?			L	1b		<u>X</u>
	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						
С	Did the foundation file Form 1120-POL for this year?			L	1c		X
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 ▶ \$				1		
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed				- 1		
_	on foundation managers > \$				1		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?				2		X
_	If "Yes," attach a detailed description of the activities						
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles	of					
•	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes				3		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?				4a		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?		N	/A [4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?				5		X
~	If "Yes," attach the statement required by General Instruction T						
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either						
•	By language in the governing instrument, or						
	By state legislation that effectively amends the governing instrument so that no mandatory directions that						
	conflict with the state law remain in the governing instrument?				6	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (i), and Par	t XV		7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)						
Ja	MI						
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General						
U	(or designate) of each state as required by General Instruction G? If "No," attach explanation				8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or				_		
3	4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes	11					Ì
	complete Part XIV				9		х
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their						
10	names and addresses	Stmt	5		10	x	
						- DI	-

Part VH-A Statements Regarding Activities (continued)	<u>Forn</u>	1990-PF(2011) The Robert and Gail Katz Family 26-3323920		_	P	age 5
meaning of section 51/2(b)(13)* If "Yes," artach schedule (see instructions) Dot the foundation make a distribution to a done advised find over which the foundation or a disqualified person had advisory privilege? If "Yes," attach statement (see instructions) Dot the foundation comply with the public inspection requirements for its annual returns and exemption application? Webside address ▶ N/A The books are in care of ▶ Dr. Robert M. Katz Telephone no ▶ 248-332-6653 Section 494/(9(1)) nonexempt characted to the public inspection requirements for the annual returns and exemption application? Section 494/(9(1)) nonexempt characted trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of face-exempt interest received or accrued during the year At any time during calendar year 2011, adult the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country > See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country > File Form 4720 if any time is checked in the "Yes" column, unless an exception applies. During the year did the foundation (either directly or ordinacity) 12 During the year did the foundation (either directly or ordinacity) 13 During the year did the foundation (either directly or ordinacity) 14 During the year did the foundation (either directly or ordinacity) 15 Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any time is checked in the "Yes" column, unless an exception applies. 16 During the year did the foundation (either directly or ordinacity) 17 Using any time is checked in the "Yes" column, unless an exception applies. 18 During the year did the foundation (either directly or ordinacity) 19 Using any time is checked in the "Yes" column, unless an exception applies. 19 Using any time is the proper did the foundation (either directly or ordinacity) 19 Using any time is	Pi	art VII-A' Statements Regarding Activities (continued)				
12 Did the foundation make a distribution to a dinor advised full over which the foundation or a disqualified person his davisory privileges? If "Yes," attack statement (see instructions) 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ≥ N/A. 14 The books are in care of ▶ Dr. Robert M. Katz 2080 BILOmfield Woods Court Located at ₱ Hest Bilooafseld. Section 4947(a)(1) nonecempt chandable trusts filing Form 990.PF in lieu of Form 1041—Check here and enter the amount of faxe region interest received or accursed during the year 15 At any time during calendar year 2011, do the foundation have an interest in or a signature or other authority over a bank, securities, or other filing requirements for form TD F 90-22 I fil "Yes," enter the name of the foreign country ▶ Part VII-B. Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any lites it checked in the "Yes" column, unless an exception applies. 15 Diamp the year did the foundation (either directly or indirectly) 16 Diamp the year did the foundation (either directly or indirectly) 17 Diamp the year did the foundation (either directly or indirectly) 18 Diamp the year did the foundation (either directly or indirectly) 19 Engage in the sale or exclusinge, or lessing of property with a disqualified person? 20 Formship goods, services, or facilities to (or accept them from) a disqualified person? 21 Formship goods, services, or facilities to (or accept them from) a disqualified person? 22 Formship goods, services, or facilities to (or accept them from) a disqualified person? 23 Formship goods, services, or facilities to (or accept them from) a disqualified person? 24 Pey compensation to, or pey or remitties the exceptions described in Regulations section 50 peys or remitties the exception of the them formship goods, services, or facilities to for accept the foundation property or property to the active services of the foundation an	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the				
person had advisory prwileges? If Yes, "attach statement (see instructions) 10 bit the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A 14 The books are in care of ▶ Dx. Robert M. Katz 2080 Bllomfield Woods Court 15 Section 494(20) in persongric chantable trusts filing Form 990-PF in lieu of Form 1041—Check here 16 A larny time during clained ay reary 2011, die the foundation have an interest in or a signature or other authority 16 No over a bank, securities, or other financial account in a foreign country? 16 See the instructions for exceptions and filing requirements for Form 107 = 90-22 1 If "Yes," enter the name of the foreign country? 17 See the instructions for exceptions and filing requirements for Form 107 = 90-22 1 If "Yes," enter the name of the foreign country? 18 Statements Regarding Activities for Which Form 4720 May Be Required 19 Flie Form 4720 if any tien is checked in the "Yes" column, unless an exception applies. 19 During the year dut the foundation (either directly or indirectly) 10 Engage in the sale or exchange, or leasing of property with a disqualified person? 21 Borrow money from, led money to, or otherwise extend credit to (or accept it from) a disqualified person? 22 Borrow money from, led money to, or otherwise extend credit to (or accept it from) a disqualified person? 23 Formats and property to a government official of the benefit or use of a disqualified person? 24 Person of property to a government official of the property of the benefit or use of a disqualified person? 35 Flary answer is "Yes" to 141/6, did any of the acts fail to qualify under the exceptions described in Regulations section \$494(16) and any of the acts fail to qualify under the exceptions described in Regulations sections \$494(16) and any of the acts fail to qualify under the exceptions described in Regulations sections \$494(16) and any of the acts described in 1, other than excepted acts, that were not corrected before the first		meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		11		X_
13 Du the foundation comply with the public inspection requirements for its annual returns and exemption application? Webster address ► N/A 14 The books are in care of ► Dr. Robert M. Katz 2080 Bllomfield Woods Court Located at ► West Bloomfield Woods Court All 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? See the instructions for exceptions and filing requirements for Form T0 F 90-22.1 HT Yes,* enter the name of the foreign country ► Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 Hamy their is checked in the "Yes" column, unless an exception applies. 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? (2) Borrow money from, lead manys (p., or otherwise extend credit (or) accept it from) a disqualified person? (3) Furnsh gods, 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 incineor or assets to 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 pend after termination of government service, if terminations within 90 days) 15 If any answer is "Yes" to 1a(1)-(8), did any of the acts fail to qualify under the exception described on Regulations esection 53 494 (6)-3 or in a current notice regarding disaster assistance check here 16 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 Exager acceptance in promoted by the common of the p	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified				
Website address ► N/A		person had advisory privileges? If "Yes," attach statement (see instructions)		12		X
14. The books are in care of ▶ Dr. Robert M. Katz 2080 Bllomfield Woods Court Located at ▶ West Bloominated Transfer Section 994(a)(1) nerewript charitable trusts filing from 990-PF in leu of Form 1041—Check here and enter the amount of tax-wentpr interest received or accrued during the year 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? See the instructions for exceptions and filing requirements for Form TD F90-22.1 HT Yes," either the name of the foreign country ▶ Part VII-B. Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 I sany item is checked in the "Yes" column, unless an exception applies. 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnsh 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 nucine or assets to a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or the property to a government official? (Exception, Check "No" if the foundation agreed to make a grant to or to employ the official for a pend after termination of government service, if terminating within 90 days; b) If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to quality under the exception described with the foundation of section 4942(0) or 4942(0) or 49	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		13	X	
Located at № Meet allocatified Woods Court Located at № Meet allocatified # Meet all		·				
Located at P Weat. BloomEnald Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in feu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year 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 accounts? See the instructions for exceptions and filing requirements for Form TD F 90-22 I If "Yes," enter the name of the foreign country P Part VIII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any litem is checked in the "Yes" column, unless an exception applies. 1 During the year of the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or lessing of property with a disqualified person? (2) Borrow money from, lend money to, or thewase 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" of the foundation agreed to make a grant to or to employ the difficial for a penod after termination of government service, if terminating within 90 days) 1 If any answers "Yes" to 14(1-16), did any of the acts fairto quality under the exceptions described in Regulations section 53 4941(d).3 or in a current notice regarding disaster assistance (see instructions)? 2 Taxes on fairure to distribute income (section 4942)(a) or not official for a penod after termination of government service, if terminating within 90 days) 3 At the end off ax year 2011, did the foundation have any undistributed income? (if applying section 4942(a)(2) (relating to incorrect valuation of assets) to the year'	14		248-3	32-	665	3
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18 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? See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶ Part VI-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. 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? (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 reimbuse 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) (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) b If any answer is "Yes" to 1a(1)-(6). Joid any of the acts fail to qualify under the exceptions described in Regulations section 53 491(a) 3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Ves X No 1b Tyes. If 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 deplication is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If a	15					▶ [
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		ng Activities for Which For		Required (cont	nued)		
5a	During the year did the foundation pay or	incur any amount to					
	(1) Carry on propaganda, or otherwise at	tempt to influence legislation (section	on 4945(e))?	Y	es 🛚 X No		
	(2) Influence the outcome of any specific	public election (see section 4955),	or to carry on,		_		
	directly or indirectly, any voter registra	ation drive?		Y	es 🗓 No		
	(3) Provide a grant to an individual for tra	vel, study, or other similar purpose	s ⁷	Y	es 🗓 No		
	(4) Provide a grant to an organization oth	er than a charitable, etc , organizat	tion described in			.	
	section 509(a)(1), (2), or (3), or section	n 4940(d)(2)? (see instructions)		_ Y	es 🗓 No		
	(5) Provide for any purpose other than re	ligious, charitable, scientific, literary	y, or educational			. 1	
	purposes, or for the prevention of crue	elty to children or animals?		Y	es 🛚 No		
b	If any answer is "Yes" to 5a(1)-(5), did ar	y of the transactions fail to qualify	under the exceptions of	lescribed in	_		
	Regulations section 53 4945 or in a curre	nt notice regarding disaster assista	nce (see instructions)?	>	N/A	5b	_
	Organizations relying on a current notice	regarding disaster assistance chec	k here		▶ 🗌		
С	If the answer is "Yes" to question 5a(4), d	oes the foundation claim exemption	n from the tax				
	because it maintained expenditure respon	sibility for the grant?		N/A 🗌 Y	'es 🗌 No		
	If "Yes," attach the statement required by	Regulations section 53 4945-5(d)					
6a	Did the foundation, during the year, received	ve any funds, directly or indirectly, t	o pay premiums				
	on a personal benefit contract?			Y	es 🗓 No		
b	Did the foundation, during the year, pay p	remiums, directly or indirectly, on a	personal benefit conti	ract?		6b	X
	If "Yes" to 6b, file Form 8870						
7a	At any time during the tax year, was the fe	oundation a party to a prohibited tax	x shelter transaction?	Y	es X No		
_ <u>b</u> _	If Yes, did the foundation receive any pro-				N/A_	7b	
P	art VIII Information About Off	icers, Directors, Trustees,	Foundation Man	agers, Highly	Paid Employe	es,	
	and Contractors						
1 1	ist all officers, directors, trustees, foun-	dation managers and their comp	ensation (see instruc	tions).			
			(b) Title, and average	(c) Compensation	(d) Contributions to	(=) Evo	onee account
	(a) Name and ad	dress	hours per week devoted to position	(If not paid, enter -0-)	employee benefit plans and deferred		ense account, allowances
			devoted to position	-0-7	compensation		
Ro	obert M. Katz	West Bloomfield	Director				
2(80 Bloomfield Woods Court	MI 48323	0.50	0	0	<u> </u>	0
Ga	ul L. Katz	West Bloomfield	Director				
2(080 Bloomfield Woods Court	MI 48323	0.50	0	0	<u> </u>	0
						L	
		<u> </u>		l		<u></u>	
2	Compensation of five highest-paid em	ployees (other than those include	ed on line 1—see ins	tructions). If none	e, enter		
	"NONE."						
			(b) Title, and average		(d) Contributions to employee benefit	(e) Expr	ense account,
	(a) Name and address of each employee pa	aid more than \$50,000	hours per week devoted to position	(c) Compensation	plans and deferred		allowances
_				ļ	compensation	<u> </u>	
N	ONE		Ì]			
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 _	I number of other paraleurs and a dec	2,000	. <u>L</u>	<u>L</u>	<u> </u>		
101	I number of other employees paid over \$50	J,UUU					0
					F	orm サタし	D-PF (2011)

Form 990-PF (2011) The Robert and Gail Katz Family	26-3323920	Page 7
Part VIII Information About Officers, Directors, Trustees, Foundationand Contractors (continued)	n Wanagers, Highly Paid E	:mpioyees,
3 Five highest-paid independent contractors for professional services (see instruction	ns). 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 organizations and other beneficiaries served, conferences convened, research papers produced, etc.	the number of	Expenses
1 N/A		
2		
3		
4		
Part IX-B Summary of Program-Related Investments (see instruction	าร)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 1 N/A		Amount
I N/A		
2		
All other program-related investments. See instructions		
3		
Total. Add lines 1 through 3	<u></u>	

om	1 990-PF (2011), The Robert and Gail Katz Family 26-3323920		
Pa	art X · 'Minimum Investment Return (All domestic foundations must complete this part. Foreig	n fou	
	see instructions.)		
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes		
а	Average monthly fair market value of securities	1a	0
b	Average of monthly cash balances	1b	0
С	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	0
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3_	0
4	Cash deemed held for charitable activities Enter 11/2% of line 3 (for greater amount, see		
	instructions)	4	0
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	0
6 _	Minimum investment return. Enter 5% of line 5	6	0
Pa	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating		
	foundations and certain foreign organizations check here		
1	Minimum investment return from Part X, line 6	1	
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)		
С	Add lines 2a and 2b	2c	4
3	Distributable amount before adjustments Subtract line 2c from line 1	3	
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII,		
	line 1	7	0
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	47,212
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	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	47,212
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 instructions)	5	4
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	47,208
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation	ation	
	qualifies for the section 4940(e) reduction of tax in those years		

Form	990-PF (2011) The Robert a	nd Gail Kat	z Family	26-332392	0	Page 9
	rt X組					
		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	(a)	(b)	(c)	(d)
1	Distributable amount for 2011 from Part X	g.	Corpus	Years prior to 2010	2010	2011
•	line 7	·				0
2	Undistributed income, if any, as of the en	d of 2011				
а	Enter amount for 2010 only					
	Total for prior years 20, 20	, 20				
3	Excess distributions carryover, if any, to 2					
а	From 2006					
b	From 2007					
С	From 2008					
d	From 2009	28,691				
е	From 2010	52,345				
f	Total of lines 3a through e		81,036			
4	Qualifying distributions for 2011 from Par	t XII,				
	line 4 ▶ \$ 47,212	Ì				
а	Applied to 2010, but not more than line 2	a [
b	Applied to undistributed income of prior y	ears				
	(Election required—see instructions)					
С	Treated as distributions out of corpus (Ele	ection				
	required—see instructions)					
d	Applied to 2011 distributable amount	Ļ				
е	Remaining amount distributed out of corp	ous	47,212			
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:					
а	Corpus Add lines 3f, 4c, and 4e Subtrac	ct line 5	128,248			
b	Prior years' undistributed income Subtra	ct				
	line 4b from line 2b	,				
С	Enter the amount of prior years' undistrib	uted				
	income for which a notice of deficiency h	as				
	been issued, or on which the section 494	2(a)				
	tax has been previously assessed					
d	Subtract line 6c from line 6b Taxable					
	amount—see instructions		······································		<u></u>	
е	Undistributed income for 2010 Subtract	line				
	4a from line 2a Taxable amount—see					
	instructions	_				
f	Undistributed income for 2011 Subtract					
	4d and 5 from line 1 This amount must l	pe				
_	distributed in 2012					
7	Amounts treated as distributions out of c	· · ·				
	to satisfy requirements imposed by secti					
_	170(b)(1)(F) or 4942(g)(3) (see instruction					
8	Excess distributions carryover from 2006					
_	applied on line 5 or line 7 (see instruction				·	
9	Excess distributions carryover to 201	2.	120 240			ļ
• •	Subtract lines 7 and 8 from line 6a		128,248			
10	Analysis of line 9	1				
a	Excess from 2007					
b	Excess from 2008	28,691				
C	Excess from 2009	52,345				
ď	Excess from 2010	47,212	1			
е	Excess from 2011	-1,212	t.,	L		<u></u>

DAA

Pa	rt XIV Private Operating Fou	ındations (see ins	structions and Pa	rt VII-A, question 9)	
1a	If the foundation has received a ruling or	determination letter th	at it is a private opera	ting		
	foundation, and the ruling is effective for	2011, enter the date o	f the ruling	•		
b	Check box to indicate whether the foundation		=	ibed in section 49	142(j)(3) or 494	2(j)(5)
2a	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	(4) 20	(5) - 5	(,,====	(-,	
	i					
	each year listed					
	85% of line 2a					
С	Qualifying distributions from Part XII,					l
	line 4 for each year listed			 		
d	Amounts included in line 2c not used directly				Í	
	for active conduct of exempt activities					
е	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					
а	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under					
	section 4942(j)(3)(B)(i)					
_	"Endowment" alternative test—enter 2/3		-	 		
b						
	of minimum investment return shown in					
	Part X, line 6 for each year listed			 		
С	"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					
Pa	rt XV Supplementary Inform	nation (Complete	this part only if	the foundation ha	ad \$5.000 or mor	e in assets at
	any time during the y				, , , , , , , , , , , , , , , , , ,	· 400010 41
1	Information Regarding Foundation Ma					
' a	List any managers of the foundation who	-	e than 2% of the total	contributions received	by the foundation	
а	before the close of any tax year (but only				-	
	N/A	ii tiley have contribut	ed more man \$5,000)	(See Section 507(d)(2)	")	
	List any managers of the foundation who	own 100/ or more of	the stock of a corpora	tion (or on oqually large	notion of the	
b	-				portion of the	
	ownership of a partnership or other entity) of which the foundat	ion has a 10% or grea	ater interest		
	N/A					
2	Information Regarding Contribution, C					
	Check here ▶ X if the foundation only		•	~	•	
	unsolicited requests for funds If the four	dation makes gifts, gr	ants, etc (see instruc	tions) to individuals or o	organizations under	
	other conditions, complete items 2a, b, c					
а	The name, address, and telephone numl	per of the person to wi	hom applications shou	ıld be addressed		
	N/A					
b	The form in which applications should be	submitted and inform	ation and materials th	ney should include		
	N/A			-		
c	Any submission deadlines				 _	-
•	N/A					
-д	Any restrictions or limitations on awards,	such as by geography	ical areas, charitable t	fields, kinds of institution	ns or other	
u		oddii as by geograpiii	ioai aicas, ciiaiitable i	noida, Kinda or mantullo	no, or other	
	factors N/A					
	41 / 42					

Form 990-PF (2011) The Robert and Gail Katz Family 26-3323920 Page **11** Part XV · Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager Foundation Recipient Purpose of grant or status of Amount contribution recipient or substantial contributor Name and address (home or business) a Paid during the year See Statement 6 47,127 47,127 ▶ 3a Total b Approved for future payment N/A

▶ 3b

<u>Total</u>

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated		Unrelate	ed business income	Exclude	d by section 512, 513, or 514		
	Program ser		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions)
]		
	f						
	g Fees an	d contracts from government agencies					
2		dues and assessments					
		savings and temporary cash investments					4
		nd interest from securities					472
5	Net rental in	come or (loss) from real estate		-			
		anced property					
		t-financed property			1		
6		come or (loss) from personal property		- " "			
		ment income				_	
	-	s) from sales of assets other than inventory					22,096
		or (loss) from special events			1		
		or (loss) from sales of inventory					
		ue a					
	b						
					i e		
	′d					-	-
	е						
12		ld columns (b), (d), and (e)		0		0	22,572
		ine 12, columns (b), (d), and (e)		<u> </u>		13	22,572
		in line 13 instructions to verify calculations)					
	art XVI-B		complishm	ent of Exempt P	urpose	es	
	Line No.	Explain below how each activity for which income	is reported in o	column (e) of Part XVI-	A contrib	outed importantly to the)
		accomplishment of the foundation's exempt purpo	ses (other than	n by providing funds fo	r such p	urposes) (See instruct	ions)
_	N/A						
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Suite 2175

Silberstein Ungar,

Bingham Farms, MI

30600 Telegraph Road/

Form 990-PF (2011)

248-203-0080

P00227780

PTIN

Firm's EIN

Phone no

Use Only

Firm's name

Firm's address

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KATZFA4 The Robert and Gail Katz Family 26-3323920

Federal Statements

FYE: 12/31/2011

Assets
of
- Sale
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Line 6a - Sal
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Part
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990-PF.
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Form 9
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Statement

			How					
De	Description		Received					
Whom Sold	Date Acquired	Date Sold	Sale Price	Cost	Expense	Depreciation	Net Gain / Loss	SSO
23.00 Call HMY Nov 0017.00	017.00	4/21/11 \$	Purchase 2,151 \$		Ω	v ₂ -	v,	2,151
2.00 Call CLF Jan 00100.00	100.00		Purchase					
	8/24/11 6/28/11	6/28/11	3,223	442				2,781
300 sh Cliffs Natural Resources	1 Resources		Purchase					
	5/17/10 3/25/11	3/25/11	28,472	15,420			H	13,052
200 sh Cliffs Natural Resources	1 Resources		Purchase					
	5/17/10 8/24/11	8/24/11	14,394	10,282			1	4,112
Total		φ,	48,240 \$	26,144	\$	0	\$	22,096

Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description		Total	N	Net Investment	Adjusted Net	Charitable Purpose
Bank Fees	S	150	رب د	75	φ.	\$ 75
Total	ۍ.	150	ψ.	75	\$	\$ 75

Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses

Charitable Purpose	‹	10	0 \$ 10
Adjusted Net	ᡐ		\$
Net Investment		10	10
=	ςŞ		·ν.
Total		20	20
	sy.		δ.
Description		Expenses MI Annual Report	Total

KATZFA4 The Robert and Gail Katz Family Fodoral Stat

26-3323920 FYE: 12/31/2011

Federal Statements

Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Fair Market Value	\$ 18,705 26,772 \$ 45,477
Basis of Valuation	Market Market
End of Year	15, 423 18, 331 33, 754
Beginning of Year	\$ 18,331
Description	300 sh Cliffs Natural Resources 2300 sh Harmony Gold Spnsd ADR Total

KATZFA4 The Robert and Gail Katz Family 26-3323920 FYE: 12/31/2011	iail Katz Family Federal Statements	11/14/2012 12:05 PM	2:05 PM
 	Statement 5 - Form 990-PF, Part VII-A, Line 10 - Substantial Contributors	Line 10 - Substantial Contributors	, ,
Name	Address	City, State, Zip	
Gail Katz 2	2080 Bloomfield Woods Court	West Bloomfield MI 48323	
			5

300 100 30 11/14/2012 12:05 PM 7,500 Amount Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year Purpose **Federal Statements** Status Address Relationship KATZFA4 The Robert and Gail Katz Family American Red Magan David American Jewish World Name Address

FYE: 12/31/2011

26-3323920

100 100 132 310 300 100 25 100 15 Friends of West Bloomfield Library Gleaners Community Food Bank Detroit Symphony Orchestra Detroit Institute of Arts Gary Burnstein Clinic Congregation Beth Ahm Futures Foundation Forgotten Harvest Detroit Public TV David Horodocker

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B'nai B'rith Youth Organization

CLAL

AMI Oakland

Amore

Access

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	Federal Statements

FYE: 12/31/2011 26-3323920

KATZFA4 The Robert and Gail Katz Family

Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name	Ac	Address		
Address	Relationship	Status	Purpose	Amount
RSTS				25
Greater New Mount Moriah				ን የ
Heidelberg				1 C
Human Rights Campaign				Ն դ
Interfaith Leadership Council				
JARC				
Jewish Com Relation				988'8
Townsh Rodorstion				125
סתאוטון דמממומרוטוו				5,056
Jewish Gay Network				554
Jewish Historical Society				113
Jewish Theological Seminary)))
Jewish Women Intl				, c
Joint Distribution Committee				
JVS				
ت . ت م کر م				000'9
				2,500
Kids Against Hunger				28
Kidz Klez				100

KATZFA4 The Robert and Gail Katz Family 26-3323920 FYE: 12/31/2011	Ę	ederal Statements		11/14/2012 12:05 PM
Statement 6 - Fo	orm 990-PF, Part	V, Line 3a - Grants and Co Year (continued)	Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)	<u>.</u>
Name	,	Address		
Address	Relationship	Status	Purpose	Amount
Luekemia/Lymphoma				25
Living Music				09
Miscellaneous				2,600
NCJW				75
Pflag				190
Song and Spirit Institute				100
Southern Poverty Law Center				09
St Sarkis Armenian Church				30
Temple Isreal				3,588
Temple Israel Sisterhood				41
UNICEF				100
University of Michigan Hillel				25
Wisdom				924
WRCJ				50
Yad Ezra				100
Other - Credit Card				1,470
				9

_ _ -

11/14/2012 12:05 PM	ω.		Amount 47, 127			φ
	XV, Line 3a - Grants and Contributions Paid During the Year (continued)		Purpose			
Federal Statements		Address	Status			
	Statement 6 - Form 990-PF, Part		Relationship			
KATZFA4 The Robert and Gail Katz Family 26-3323920 FYE: 12/31/2011	Statemen	Name	Address			
KATZFA4 T 26-3323920 FYE: 12/31/2			H 			