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Form **990-PF**

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

OMB No 1545-0052

2011Department of the Treasury
Internal Revenue Service

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

For calendar year 2011 or tax year beginning , and ending

Name of foundation BARTON AND SHIRLEY WEISMAN FOUNDATION, INC.		A Employer identification number 58-2684069
Number and street (or P.O. box number if mail is not delivered to street address) 17603 LAKE ESTATES DRIVE	Room/suite	B Telephone number (see instructions) 954-491-2000
City or town, state and ZIP code BOCA RATON FL 33496		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 4,651,108	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c) and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	380,250			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	25	25		
	4 Dividends and interest from securities	150,205	150,205		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	241,690			
	b Gross sales price for all assets on line 6a	346,774			
	7 Capital gain net income (from Part IV, line 2)		241,690		
	8 Net short-term capital gain			0	
	9 Income modifications				
Operating and Administrative Expenses	10a Gross sales less returns & allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule) STMT 1	830	830		
	Total. Add lines 1 through 11	773,000	392,750	0	
	12 Compensation of officers, directors, trustees, etc	0			
	13 Other employee salaries and wages				
	14 Pension plans, employee benefits				
	15a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 2	3,120	3,120		
	c Other professional fees (attach schedule)				
17 Interest					
18 Taxes (attach schedule) (see instructions) STMT 3	9,651	110			
19 Depreciation (attach schedule) and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses (att sch)					
24 Total operating and administrative expenses					
Add lines 13 through 23	12,771	3,230	0	0	
25 Contributions, gifts, grants paid	426,545			426,545	
26 Total expenses and disbursements. Add lines 24 and 25	439,316	3,230	0	426,545	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	333,684				
b Net investment income (if negative, enter -0-)		389,520			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2011)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	53,620	210,899	210,899
	3	Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶	0		
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) SEE STMT 4	1,912,125	1,926,881	4,440,209
	c	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 instructions. Also, see page 1, item I)	1,965,745	2,137,780	4,651,108
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27	Capital stock, trust principal, or current funds	1,735,647	1,735,647	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	230,098	402,133	
	30	Total net assets or fund balances (see instructions)	1,965,745	2,137,780	
	31	Total liabilities and net assets/fund balances (see instructions)	1,965,745	2,137,780	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,965,745
2	Enter amount from Part I, line 27a	2	333,684
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	2,299,429
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 5	5	161,649
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,137,780

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	5000 HEALTH CARE SERVICES GROUP INC	D	10/15/97	04/05/11
b	2014 HEALTH CARE SERVICES GROUP INC	D	10/15/97	04/11/11
c	2985 HEALTH CARE SERVICES GROUP INC	D	09/15/98	04/11/11
d	5000 HEALTH CARE SERVICES GROUP INC	D	09/15/98	11/03/11
e	SEE ATTACHED STATEMENT	P	VARIOUS	VARIOUS

(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 89,992		9,218	80,774
b 36,252		3,713	32,539
c 53,740		5,603	48,137
d 89,992		9,383	80,609
e 76,798		77,167	-369

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k) but not less than -0-) or Losses (from col (h))
a			80,774
b			32,539
c			48,137
d			80,609
e			-369

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	241,690
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010	548,161	3,572,152	0.153454
2009	384,028	2,729,588	0.140691
2008	334,574	2,990,236	0.111889
2007	510,715	3,411,962	0.149684
2006	310,727	2,620,211	0.118589

2 Total of line 1, column (d)	2	0.674307
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.134861
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	3,922,998
5 Multiply line 4 by line 3	5	529,059
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,895
7 Add lines 5 and 6	7	532,954
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions	8	426,545

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	7,790
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	7,790
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	7,790
6	Credits/Payments		
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a	4,720
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	4,720
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	3,070
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 <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
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)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2	X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	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?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5	X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	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 (c), and Part XV	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) FL		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 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	10	X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► SHIRLEY WEISMAN 17603 LAKE ESTATES DR. Located at ► BOCA RATON FL ZIP+4 ► 33496 Telephone no ►			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year	15		<input type="checkbox"/>
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 F 90-22.1 If "Yes," enter the name of the foreign country ►	16	Yes <input type="checkbox"/>	No X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	N/A	1c
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years ► 20 , 20 , 20 , 20	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
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 ► 20 , 20 , 20 , 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2011 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011)	N/A	3b
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?		X

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? **N/A** ☐ **5b**

Organizations relying on a current notice regarding disaster assistance check here ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? **N/A** ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☐ Yes ☒ No **X**

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If Yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **N/A** **7b**

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
BARTON WEISMAN 17603 LAKE ESTATES DRIVE BOCA RATON FL 33496	DIRECTOR 1.00	0	0	0
SHIRLEY WEISMAN 17603 LAKE ESTATES DRIVE BOCA RATON FL 33496	DIRECTOR 1.00	0	0	0
ANDREW WEISMAN 7650 N.W. 47TH DRIVE CORAL SPRINGS FL 33067	DIRECTOR 0.00	0	0	0
MARCIA LANGLEY 17735 FIELDBROOK CIRCLE N BOCA RATON FL 33496	DIRECTOR 0.00	0	0	0

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

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

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE "

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

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. See instructions.	
3	

Total. Add lines 1 through 3

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	3,850,478
b	Average of monthly cash balances	1b	132,261
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	3,982,739
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	3,982,739
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	59,741
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,922,998
6	Minimum investment return. Enter 5% of line 5	6	196,150

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	196,150
2a	Tax on investment income for 2011 from Part VI, line 5	2a	7,790
b	Income tax for 2011 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	7,790
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	188,360
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	188,360
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	188,360

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	426,545
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	426,545
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	426,545

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				188,360
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2011				
a From 2006				181,262
b From 2007				344,687
c From 2008				192,314
d From 2009				250,295
e From 2010				378,973
f Total of lines 3a through e	1,347,531			
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 426,545				
a Applied to 2010, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2011 distributable amount				188,360
e Remaining amount distributed out of corpus	238,185			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,585,716			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions)	181,262			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	1,404,454			
10 Analysis of line 9				
a Excess from 2007				344,687
b Excess from 2008				192,314
c Excess from 2009				250,295
d Excess from 2010				378,973
e Excess from 2011				238,185

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling ▶

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

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

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

1 Information Regarding Foundation Managers

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

BARTON WEISMAN **\$380,250**

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

N/A

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

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

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

N/A

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

N/A

c Any submission deadlines

N/A

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

N/A

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

Recipient	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
Name and address (home or business)				
a Paid during the year SEE STATEMENT 6				426,545
Total			3a	426,545
b Approved for future payment N/A				
Total			3b	

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

Line No.

Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

N/A

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2011

Name of the organization

**BARTON AND SHIRLEY WEISMAN
FOUNDATION, INC.**

Employer identification number

58-2684069

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ► \$

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

Name of organization BARTON AND SHIRLEY WEISMAN	Employer identification number 58-2684069
---	---

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BARTON AND SHIRLEY WEISMAN 17603 LAKE ESTATE DRIVE BOCA RATON FL 33496-1425	\$ 380,250	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization

BARTON AND SHIRLEY WEISMAN

Employer identification number

58-2684069**Part II Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	5,000 SHARES OF HEALTH CARE	\$ 89,950	11/08/11
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	5,000 SHARES OF HEALTH CARE	\$ 90,300	11/30/11
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

2011 Year End Summary

BARTON AND SHIRLEY WEISMAN FOU
Account Number 600-48706-11 938

Details of Short Term Gain (Loss) 2011

This section shows your sales of securities during the year. The "Sale Proceeds" column excludes any accrued income you may have received. In addition, although cash in lieu less than \$20 is not included on Form 1099-B (if applicable), it is included in this section. Please note, this material is being prepared for informational purposes only and should not be used for tax preparation without the assistance of your tax advisor.

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Cost	(Loss)	Gain
125000020	.3933	WTS AMERICAN INTL GROUP EXP 1/19/2021 RECORD 01/13/11 PAY 01/19/11	01/20/11	01/20/11	\$ 6.03	\$ 6.36	(\$ 33)	
Total					\$ 6.03	\$ 6.36	(\$ 33)	

Details of Long Term Gain (Loss) 2011

This section shows your sales of securities during the year. The "Sale Proceeds" column excludes any accrued income you may have received. In addition, although cash in lieu less than \$20 is not included on Form 1099-B (if applicable), it is included in this section. Please note, this material is being prepared for informational purposes only and should not be used for tax preparation without the assistance of your tax advisor.

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Cost	(Loss)	Gain
125000010	5 976 8.964 3 06 82	AOL INC	02/11/05 07/09/08 09/09/09 10/21/10	11/15/11	\$ 89.90 134.85 46.03 1,233.54	\$ 178.34 206.77 63.33 2,101.92	(\$ 88.44) (71.92) (17.30) (868.38)	
125000030	300 500	BOSTON SCIENTIFIC CORP	01/05/07 12/24/07	11/15/11	1,735.65 2,892.74	5,219.00 5,759.00	(3,483.35) (2,866.26)	
125000040	50	COCA-COLA CO VS HIGHEST COST	06/20/05	11/15/11	3,395.93	2,220.00		1,175.93
125000050	50	COSTCO WHOLESALE CORP NEW CGMI AND/OR ITS AFFILIATES	12/20/04	11/15/11	4,205.41	2,387.50		1,817.91 ^c
125000060	50	WALT DISNEY CO FIFO	04/14/05	11/15/11	1,819.46	1,395.86		423.60
125000070	100	ECOLAB INC	12/20/04	11/15/11	5,581.20	3,456.00		2,125.20 ^c
125000080	200	H J HEINZ CO	06/20/05	11/15/11	10,690.41	7,297.00		3,393.41
125000090	80	ITRON INC CGMI AND/OR ITS AFFILIATES	09/09/09	11/15/11	2,944.34	4,787.60	(1,843.26)	
125000100	200 200	MARSH & MCLENNAN COS INC	01/05/07 12/24/07	11/15/11	6,172.88 6,172.88	6,227.20 5,229.00	(54.32)	943.88

2 0 1 1 Y E A R E N D S U M M A R Y



MorganStanley SmithBarney

Ref 00000318 00041151

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2011 Year End Summary

BARTON AND SHIRLEY WEISMAN FOU
Account Number 600-48706-11 938

Details of Long Term Gain (Loss) 2011 - continued

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Cost	(Loss)	Gain
125000110	75	MEDCO HEALTH SOLUTIONS INC	10/21/10	11/15/11	\$ 4,259.91	\$ 3,853.50		\$ 406.41
125000120	200	NEWS CORP CLASS A NEW	02/11/05	11/15/11	3,471.93	3,457.00		14.93
	300	CGMI AND/OR ITS AFFILIATES	11/28/05		5,207.90	4,544.03		663.87
	100		09/15/08		1,735.96	1,385.78		350.18
125000130	200	PAYCHEX INC	10/21/10	11/15/11	5,854.54	5,661.40		193.14
		CGMI AND/OR ITS AFFILIATES						
125000140	200	US BANCORP DEL NEW	12/03/09	11/15/11	5,088.30	4,761.40		326.90
125000150	300	XEROX CORP	11/28/05	11/15/11	2,438.35	4,235.03	(1,796.68)	
	200		09/15/08		1,625.57	2,740.56	(1,114.99)	
Total					\$ 76,797.68	\$ 77,167.22	(\$ 12,204.90)	\$ 11,835.36

^cBased on information supplied by Client or other financial institution, not verified by us.

2 0 1 1 Y E A R

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME	\$ 830	\$ 830	\$
TOTAL	\$ 830	\$ 830	\$ 0

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
GZWP, CPA	\$ 3,120	\$ 3,120	\$	\$
TOTAL	\$ 3,120	\$ 3,120	\$ 0	\$ 0

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FOREIGN TAX	\$ 110	\$ 110	\$	\$
TAX ON NET INVESTMENT INCOME	9,541			
TOTAL	\$ 9,651	\$ 110	\$ 0	\$ 0

Federal Statements

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

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
SEE ATTACHED SCHEDULE 1	\$ 452,755	\$ 476,663	COST	\$ 471,104
SEE ATTACHED SCHEDULE 2	1,459,370	1,450,218	COST	3,969,105
TOTAL	\$ 1,912,125	\$ 1,926,881		\$ 4,440,209

Reserved Client Statement

December 1 - December 31, 2011

STATEMENT 4
SCHEDULE 1

Page 3 of 13

Morgan Stanley
Smith Barney

Ref 00008231 00072809

BARTON AND SHIRLEY WEISMAN FOU Account number 600-48706-11 938

Common stocks & options

Citi Investment Research & Analysis (CIRA), Morgan Stanley & Co. LLC (Morgan Stanley) and Standard & Poor's equity research ratings may be shown for certain securities. All research ratings represent the "opinions" of the research provider and are not representations or guarantees of performance. Because the applicable research report for each company contains more complete information regarding the analyst's opinions, analysis and rating, you should read the entire research report and not infer its contents from the rating. Where a particular company is covered by both CIRA and Morgan Stanley, you can and should view both research reports. CIRA's equity research ratings are (1) (Buy), (2) (Neutral) and (3) (Sell). For ease of comparison, Morgan Stanley and Standard & Poor's equity research ratings have been normalized to a 1 (Buy), 2 (Hold), and 3 (Sell). Please refer to the end of this statement for a summary guide describing CIRA, Morgan Stanley and Standard & Poor's ratings. Morgan Stanley Smith Barney does not take responsibility for, and does not guarantee the accuracy, completeness, or timeliness of research prepared by Standard & Poor's.

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated Income (annualized)
200	QIAGEN-EUR	QGEN	10/21/10	\$ 3,755.40	\$ 18.747	\$ 13.81	\$ 2,762.00	(\$ 993.40)	LT	
300	Exchange rate 1 2939000									
500	Shares traded in.		11/15/11	4,280.01	14,246	13.81	4,143.00	(137.01)	ST	
	EURO Monetary Unit			8,035.41	16.071		8,905.00	(1,130.41)		
100	ABBOTT LABORATORIES	ABT	09/09/08	4,635.84	46.298	56.23	5,623.00	987.16	LT	
50	Rating: Cnrgroup . 3		10/21/10	2,655.00	52.98	56.23	2,811.50	156.50	LT	
150	Morgan Stanley 1			7,290.84	48.806		8,434.50	1,143.66	3.414	288.00
	S&P 1									
100	ALCOA INC	AA	02/11/05	3,051.00	29.96	8.65	865.00	(2,186.00)	LT	
100	Rating: Cnrgroup 2		06/20/05	2,859.00	28.04	8.65	865.00	(1,994.00)	LT	
100	Morgan Stanley . 1		11/28/05	2,835.00	27.80	8.65	865.00	(1,970.00)	LT	
300	S&P 1		09/09/09	3,857.52	12.838	8.65	2,595.00	(1,262.52)	LT	
400			11/15/11	4,144.76	10.346	8.65	3,460.00	(684.76)	ST	
1,000				16,747.28	16.747		8,650.00	(8,097.28)	1.387	120.00
200	ALLSCRIPTS HEALTHCARE SOLUTIONS INC	MDRX	10/21/10	3,760.00	18.77	18.94	3,788.00	28.00	LT	
	Rating: Cnrgroup . 1									
	Morgan Stanley . 2									
	S&P Quantitative : 1									
53	WTS AMERICAN INTL GROUP EXP 1/19/2021		01/20/11	857.01	16.29	5.51	292.03	(564.98)	ST	
25	AMERICAN INTL GROUP INC	AIG	12/20/04	32,525.00	1,301.00	23.20	580.00	(31,945.00)*	LT	
75	Rating: Cnrgroup 2		12/03/09	2,301.00	30.60	23.20	1,740.00	(561.00)	LT	
100	Morgan Stanley . 2			34,826.00	348.26		2,320.00	(32,506.00)		
	S&P 1									
50	AMGEN INC	AMGN	09/09/09	2,951.00	58.90	64.21	3,210.50	259.50	LT	
50	Rating: Cnrgroup 1		12/03/09	2,835.00	56.58	64.21	3,210.50	375.50	LT	
100	S&P 1			5,786.00	57.86		6,421.00	635.00	2.242	144.00

December 1 - December 31, 2011

Ref: 00008231 00072810

BARTON AND SHIRLEY WEISMAN FOU Account number 600-48706-11 938

Common stocks & options continued

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated Income (annualized)
300	APPLIED MATERIALS INC DELAWARE Rating: Cnrgroup 2	AMAT	06/20/05	\$ 5,077.00	\$ 16.74	\$ 10.71	\$ 3,213.00	(\$ 1,864.00) LT		
200	Morgan Stanley 1		11/28/05	3,677.00	18.11	10.71	2,142.00	(1,535.00) LT		
200	S&P 1		10/21/10	2,403.40	11.987	10.71	2,142.00	(261.40) LT		
700				11,157.40	15.939		7,497.00	(3,660.40)	2.987	224.00
200	BANCO SANTANDER S.A. Rating: Cnrgroup : 2H	STD	10/21/10	2,697.40	13.457	7.52	1,504.00	(1,193.40) LT	9.175	138.00
100	BRISTOL MYERS SQUIBB CO Rating: Cnrgroup 1	BMY	02/11/05	2,442.00	23.87	35.24	3,524.00	1,082.00 LT		
100	Morgan Stanley 1		04/14/05	2,661.00	26.06	35.24	3,524.00	863.00 LT		
100	S&P : 1		06/20/05	2,618.00	25.63	35.24	3,524.00	906.00 LT		
300				7,721.00	25.737		10,572.00	2,851.00	3.859	408.00
200	CENTURYLINK INC Rating: Cnrgroup 1H Morgan Stanley : 1	CTL	11/15/11	7,490.00	37.42	37.20	7,440.00	(50.00) ST	7.795	580.00
50	CERNER CORP Rating: Cnrgroup : 1 Morgan Stanley 1	CERN	10/21/10	2,167.50	43.23	61.25	3,062.50	895.00 LT		
100	CISCO SYS INC Rating: Morgan Stanley : 1	CSCO	04/14/05	1,821.50	17.94	18.08	1,808.00	(13.50) LT		
300	S&P : 2		11/28/05	5,261.03	17.52	18.08	5,424.00	162.97 LT		
400				7,082.53	17.706		7,232.00	149.47	1.327	96.00
100	CITIGROUP INC	C	10/21/10	4,154.00	41.54	26.31	2,631.00	(1,523.00) LT		
100			11/15/11	2,806.80	28.008	26.31	2,631.00	(175.80) ST		
200				6,950.80	34.804		5,262.00	(1,688.80)	.152	8.00
100	COCA-COLA CO Rating: Cnrgroup 1	KO	02/11/05	4,340.00	42.85	69.97	6,997.00	2,657.00 LT		
50	Morgan Stanley 2		06/20/05	2,220.00	43.85	69.97	3,498.50	1,278.50 LT		
150	S&P : 1			6,560.00	43.733		10,495.50	3,935.50	2.688	282.00
50	COLGATE PALMOLIVE CO Rating: Cnrgroup : 2 Morgan Stanley : 1	CL	02/11/05	2,766.50	54.73	92.39	4,619.50	1,853.00 LT	2.511	116.00
400	COMCAST CORP CL A - SPL Rating: Cnrgroup : 2	CMCSK	12/24/07	7,300.12	18.237	23.56	9,424.00	2,123.88 LT	1.91	180.00
150	COSTCO WHOLESALE CORP NEW Rating: Cnrgroup 2 Morgan Stanley 1	COST	12/20/04	7,162.50	47.75	83.32	12,498.00	5,335.50* LT	1.152	144.00
	S&P : 2									

MorganStanley
SmithBarney

Ref. 0008231 00072811

Reserved Client Statement

December 1 - December 31, 2011

STATEMENT 4
SCHEDULE 1

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Common stocks & options *continued*

BARTON AND SHIRLEY WEISMAN FOU Account number 600-48706-11 938

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated Income (annualized)
100	DANAHER CORP DE Rating: Citigroup . 1 S&P . 2	DHR	11/15/11	\$ 4,950.69	\$ 49.446	\$ 47.04	\$ 4,704.00	(\$ 246.69) ST	212 %	\$ 10.00
1,000	DELTA AIR LINES INC (NEW) Rating: Morgan Stanley . 1 S&P . 1	DAL	11/15/11	8,106.00	8.00	8.09	8,090.00	(18.00) ST		
200	DENTSPLY INTL INC Rating: S&P . 1	XRAY	12/27/05	5,472.01	27.335	34.99	6,998.00	1,525.99 LT		
100			10/21/10	3,251.00	32.45	34.99	3,499.00	248.00 LT		
300				8,723.01	29.077		10,497.00	1,773.99	.828	86.00
50	WALT DISNEY CO Rating: Citigroup . 1	DIS	04/14/05	1,395.85	27.917	37.50	1,875.00	479.15 LT		
200	Morgan Stanley . 1 S&P . 1		11/28/05	4,937.08	24.685	37.50	7,500.00	2,562.92 LT		
250				6,332.93	25.332		9,375.00	3,042.07	1.60	150.00
200	ECOLAB INC Rating: Citigroup 2 S&P . 2	ECL	12/20/04	6,912.00	34.56	57.81	11,582.00	4,650.00* LT	1.383	180.00
50	EQUINIX INC Rating: Citigroup 1 Morgan Stanley 2 S&P Quantitative 3	EQIX	11/15/11	4,981.50	99.51	101.40	5,070.00	88.50 ST		
100	EXPEDITORS INTL OF WASH INC Rating: Morgan Stanley 3 S&P 1	EXPD	06/06/07	4,299.00	42.94	40.96	4,096.00	(203.00) LT		
100			09/15/08	3,649.00	36.44	40.96	4,096.00	447.00 LT		
200				7,948.00	39.74		8,192.00	244.00	1.22	100.00
700	FORD MOTOR COMPANY Rating: Citigroup 1H Morgan Stanley 1 S&P . 1	F	11/15/11	7,661.76	10.936	10.76	7,532.00	(129.76) ST	1.858	140.00
100	GANNETT CO INC Rating: Citigroup 2 S&P 1	GCI	07/09/08	1,957.23	19.555	13.37	1,337.00	(620.23) LT		
200			09/15/08	3,534.12	17.145	13.37	2,674.00	(860.12) LT		
500			09/09/09	4,079.50	8.147	13.37	6,685.00	2,605.50 LT		
800				9,570.85	11.964		10,696.00	1,125.15	2.393	256.00
200	GENERAL ELECTRIC CO Rating: Citigroup 1 S&P 1	GE	01/05/07	7,605.00	37.63	17.91	3,582.00	(4,024.00) LT		
50			06/06/07	1,871.50	37.33	17.91	895.50	(976.00) LT		
100			07/09/08	2,764.78	27.597	17.91	1,791.00	(973.78) LT		
250			12/03/09	4,058.48	16.209	17.91	4,477.50	419.02 LT		
600				16,300.76	27.168		10,746.00	(5,554.76)	3.796	408.00

Reserved Client Statement

December 1 - December 31, 2011

MorganStanley
SmithBarney

Ref: 00008231 00072812

BARTON AND SHIRLEY WEISMAN FOU Account number 600-48706-11 938

Common stocks & options continued

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated Income (annualized)
200	GENERAL MILLS INC Rating: Cnigroup 1 Morgan Stanley 1 S&P 1	GIS	11/28/05	\$ 4,855.00	\$ 24.00	\$ 40.41	\$ 8,082.00	\$ 3,227.00 LT	3.019%	\$ 244.00
400	GENERAL MOTORS COMPANY Rating: Cnigroup 1H Morgan Stanley 1	GM	11/15/11	9,276.60	23.176	20.27	8,108.00	(1,168.60) ST		
75	HSBC HLDG PLC SP ADR NEW Rating: Cnigroup 1 S&P 1	HBC	12/03/09	4,528.50	60.30	38.10	2,857.50	(1,671.00) LT		
75			10/21/10	3,981.00	53.00	38.10	2,857.50	(1,123.50) LT		
50			11/15/11	2,001.50	39.91	38.10	1,905.00	(96.50) ST		
200				10,511.00	52.555		7,620.00	(2,891.00)	5.118	390.00
100	HARMAN INTL INDS INC NEW Rating: S&P 2	HAR	10/21/10	3,573.65	35.676	38.04	3,804.00	230.35 LT	.788	30.00
500	HERTZ GLOBAL HOLDINGS INC	HTZ	11/15/11	5,949.25	11.686	11.72	5,860.00	(89.25) ST		
100	ILLINOIS TOOL WORKS INC Rating: Cnigroup 2 S&P 2	ITW	11/15/11	4,650.00	46.44	46.71	4,671.00	21.00 ST	3.082	144.00
200	ILLUMINA INC Rating: Cnigroup 2 Morgan Stanley 1 S&P 1	ILMN	11/15/11	6,298.02	31.46	30.48	6,098.00	(202.02) ST		
300	INTEL CORP	INTC	09/15/08	5,989.34	19.947	24.25	7,275.00	1,285.66 LT		
200	Rating: Cnigroup 1 S&P 2		10/21/10	3,955.40	19.747	24.25	4,850.00	894.60 LT		
500				9,944.74	19.889		12,125.00	2,180.26	3.483	420.00
25	INTL BUSINESS MACHINES CORP Rating: Cnigroup 1 Morgan Stanley 2 S&P 1	IBM	10/21/10	3,513.50	140.30	183.88	4,597.00	1,083.50 LT	1.631	75.00
100	JOHNSON & JOHNSON Rating: Cnigroup 1 Morgan Stanley 2 S&P 1	JNJ	12/03/09	6,437.70	64.317	65.58	6,558.00	120.30 LT		
50			10/21/10	3,214.50	64.17	65.58	3,279.00	64.50 LT		
150				9,652.20	64.348		9,837.00	184.80	3.476	342.00
100	JOHNSON CONTROLS INC Rating: Cnigroup 2 Morgan Stanley 1 S&P 1	JCI	10/21/10	3,399.70	33.937	31.26	3,126.00	(273.70) LT		
200			11/15/11	6,305.38	31.496	31.26	6,252.00	(53.38) ST		
300				9,705.08	32.35		9,378.00	(327.08)	2.303	216.00
50	KIMBERLY CLARK CORP Rating: Cnigroup 2 S&P 2	KMB	09/09/09	2,898.00	57.84	73.56	3,678.00	780.00 LT	3.806	140.00

Ref: 0008231 00072813

MorganStanley
SmithBarneyReserved
Client Statement

December 1 - December 31, 2011

STATEMENT 4
SCHEDULE 1

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BARTON AND SHIRLEY WEISMAN FOU Account number 600-48706-11 938

Common stocks & options *continued*

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated Income (annualized)
200	KRAFT FOODS INC CLASS A Rating: Citigroup 1 Morgan Stanley 2 S&P 2	KFT	07/09/08	\$ 5,842.56	\$ 29.187	\$ 37.36	\$ 7,472.00	\$ 1,629.44 LT	3 104%	\$ 232.00
100	LAMAR ADVERTISING CO CLASS A Rating: Citigroup 2 Morgan Stanley 2 S&P 2	LAMR	11/28/05	4,644.00	45.89	27.50	2,750.00	(1,894.00) LT		
50			08/15/08	1,837.00	36.64	27.50	1,375.00	(462.00) LT		
150				6,481.00	43.207		4,125.00	(2,356.00)		
100	LINEAR TECHNOLOGY CORPORATION Rating: Citigroup 2 S&P 2	LLTC	06/06/07	3,609.00	36.04	30.03	3,003.00	(606.00) LT		
200			12/24/07	6,536.56	32.157	30.03	6,006.00	(530.56) LT		
300				10,145.56	33.819		9,009.00	(1,136.56)	3.196	288.00
100	LUXOTTICA GROUP SPA SP ADR	LUX	10/21/10	2,945.80	29.388	27.93	2,793.00	(152.80) LT		
150			11/15/11	4,341.83	28.905	27.93	4,189.50	(152.33) ST		
250				7,287.63	29.151		6,982.50	(305.13)	1.825	113.50
20	MASTERCARD INC Rating: Citigroup 2 Morgan Stanley 1 S&P 2	MA	12/03/09	4,842.80	241.84	372.82	7,456.40	2,613.60 LT		
10			10/21/10	2,466.10	246.01	372.82	3,728.20	1,262.10 LT		
30				7,308.90	243.63		11,184.60	3,875.70	16	18.00
50	MEDTRONIC INC Rating: Citigroup 1 Morgan Stanley 2 S&P 2	MDT	02/11/05	2,708.50	53.57	38.25	1,912.50	(796.00) LT		
100			06/20/05	5,354.00	52.99	38.25	3,825.00	(1,529.00) LT		
50			12/03/09	2,185.00	43.58	38.25	1,912.50	(272.50) LT		
100			10/21/10	3,558.70	35.527	38.25	3,825.00	266.30 LT		
300				13,806.20	46.021		11,475.00	(2,331.20)	2.535	291.00
86	MERCK & CO INC NEW Rating: Citigroup 2 Morgan Stanley 2 S&P 1	MRK	04/14/05	1,774.98	20.675	37.70	3,242.20	1,467.22 LT		
200			09/15/08	6,744.65	33.782	37.70	7,540.00	795.35 LT		
286				8,519.63	29.789		10,782.20	2,262.57	4.456	480.48
300	MICROCHIP TECHNOLOGY INC Rating: Citigroup 2 S&P 2	MCHP	12/24/07	9,311.38 R	32.69	36.63	10,989.00	1,677.62 LT	3.80	417.60
100	NESTLE S A SPONSORED ADR Rating: Citigroup 2	NSRGY	09/09/09	4,175.00	41.69	57.71	5,771.00	1,596.00 LT	3.061	176.70
100	NOVARTIS AG ADR Rating: Citigroup 2 Morgan Stanley 1 S&P 1	NVS	03/10/06	5,548.00	54.93	57.17	5,717.00	169.00 LT		
50			11/15/11	2,768.50	55.25	57.17	2,858.50	90.00 ST		
150				8,316.50	55.443		8,575.50	259.00	3.507	300.75

**Reserved
Client Statement**

December 1 - December 31, 2011

Ref 00008231 00072814

Morgan Stanley
Smith Barney

BARTON AND SHIRLEY WEISMAN FOU Account number 600-48706-11 938

Common stocks & options continued

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated income (annualized)
50	PEPSICO INC	PEP	09/09/09	\$ 2,903.00	\$ 57.94	\$ 66.35	\$ 3,317.50	\$ 414.50 LT		
50	Rating: Cnrgroup . 2									
100	Morgan Stanley 2		10/21/10	3,266.50	65.21	66.35	3,317.50	51.00 LT		
	S&P . 1			6,169.50	61.695		6,635.00	465.50	3 104	206.00
50	PROCTER & GAMBLE CO	PG	09/09/09	2,698.50	53.85	66.71	3,335.50	637.00 LT	3 147	105.00
	Rating: Cnrgroup 1									
	Morgan Stanley 1									
	S&P . 2									
50	QUALCOMM INC	QCOM	02/11/05	1,812.00	35.64	54.70	2,735.00	923.00 LT		
50	Rating: Cnrgroup : 1		04/14/06	1,647.26	32.845	54.70	2,735.00	1,087.74 LT		
100	Morgan Stanley 1			3,459.26	34.593		5,470.00	2,010.74	1 572	86.00
	S&P : 1									
100	SCHLUMBERGER LTD	SLB	02/11/05	3,712.50	36.825	68.31	6,831.00	3,118.50 LT	1 463	100.00
	Rating: Cnrgroup . 1									
	Morgan Stanley 1									
	S&P . 1									
100	SONOCO PRODUCTS CO	SON	02/11/05	2,933.00	28.78	32.96	3,296.00	363.00 LT		
100	Rating: S&P . 1		06/20/05	2,797.00	27.42	32.96	3,296.00	499.00 LT		
200				5,730.00	28.65		6,592.00	862.00	3 519	232.00
300	SOUTHWEST AIRLINES CO	LUV	06/06/07	4,251.00	14.16	8.56	2,568.00	(1,683.00) LT		
300	Rating: Morgan Stanley 3		12/24/07	3,915.00	12.70	8.56	2,568.00	(1,347.00) LT		
200	S&P 1		09/09/09	1,757.68	8.758	8.56	1,712.00	(45.68) LT		
200			11/15/11	1,647.38	8.206	8.56	1,712.00	64.62 ST		
1,000				11,571.06	11.571		8,560.00	(3,011.06)	.21	18.00
50	STERICYCLE INC	SRCL	12/03/09	2,817.50	56.23	77.92	3,898.00	1,078.50 LT		
	Rating: Morgan Stanley : 2									
	S&P . 2									
200	THOMSON REUTERS CORP	TRI	11/15/11	5,862.60	28.783	26.67	5,334.00	(528.60) ST	4 649	248.00
	Rating: Cnrgroup 2									
	Morgan Stanley 2									
	S&P . 3									
50	3M COMPANY	MMM	03/10/06	3,638.51	72.69	81.73	4,086.50	448.99 LT	2 691	110.00
	Rating: Cnrgroup 2									
	S&P . 2									
66.4	TIME WARNER INC	TWX	02/11/05	2,565.54	38.637	36.14	2,399.70	(165.84) LT		
99.6	Rating: Cnrgroup 1		07/09/08	2,974.59	29.865	36.14	3,599.54	624.95 LT		
34	Morgan Stanley 2		09/09/09	911.03	26.795	36.14	1,228.76	317.73 LT		
	S&P 1									
200				6,451.16	32.258		7,228.00	776.84	2 60	188.00

Morgan Stanley Smith Barney

Ref 00008231 00072815

Reserved Client Statement

December 1 - December 31, 2011

STATEMENT 4
SCHEDULE 1

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BARTON AND SHIRLEY WEISMAN FOU Account number 600-48706-11 938

Common stocks & options *continued*

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated Income (annualized)
100	UNITED CONTINENTAL HOLDINGS INC	UAL	10/21/10	\$ 2,843.00	\$ 28.37	\$ 18.87	\$ 1,887.00	(\$ 956.00) LT		
400	Rating: Morgan Stanley S&P : 1		11/15/11	7,196.60	17.976	18.87	7,548.00	351.40 ST		
500				10,039.60	20.079		9,435.00	(604.60)		
100	VERIZON COMMUNICATIONS	VZ	02/11/05	3,330.49	33.304	40.12	4,012.00	681.51 LT		
100	Rating: Citigroup : 2		11/28/05	2,942.74	29.427	40.12	4,012.00	1,069.26 LT		
100	Morgan Stanley S&P : 2		10/21/10	3,263.70	32.577	40.12	4,012.00	748.30 LT		
300				9,536.93	31.79		12,036.00	2,499.07	4.985	600.00
50	VISA INC COM CL A	V	09/09/09	3,539.50	70.67	101.53	5,076.50	1,437.00 LT		
50	Rating: Citigroup : 2		10/21/10	4,029.50	80.47	101.53	5,076.50	1,047.00 LT		
100	Morgan Stanley S&P : 2			7,669.00	76.69		10,153.00	2,484.00	866	88.00
25	VODAFONE GROUP PLC SPONS	VOD	06/20/05	724.86	28.994	28.03	700.75	(24.11) LT		
175	ADR NEW		11/28/05	4,363.02	24.931	28.03	4,905.25	542.23 LT		
100	Rating: Citigroup : 1		09/15/08	2,340.78	23.357	28.03	2,803.00	462.22 LT		
300	Morgan Stanley S&P : 1			7,428.66	24.762		8,409.00	980.34	5.148	432.90
Total common stocks and options				\$ 476,662.97			\$ 471,103.83	\$ 5,558.87	2.28	\$ 10,750.93

STATEMENT 4
SCHEDULE 2

Common stocks & options

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated Income (annualized)
36,868 9999	HEALTH CARE SERVICES GROUP INC	HCSG	09/15/98	\$ 69,187.78	\$ 1.876	\$ 17.69	\$ 652,230.30	\$ 583,042.52#	LT	
15,000			03/15/99	27,407.26	1.827	17.69	265,350.00	237,942.74*	LT	
50,342.8162			12/08/04	311,900.53	6.195	17.69	890,564.42	578,663.89*	LT	
19,022.413			12/08/04	117,853.97	6.195	17.69	336,506.49	218,652.52*	LT	

Reserved Client
Financial Management Account

December 1 - December 31, 2011

MorganStanley
SmithBarney

Ref 00008227 00072777

BARTON AND SHIRLEY WEISMAN Account number 600-48693-16 938

Common stocks & options continued

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated Income (annualized)
9,000.0342	HEALTH CARE SERVICES GROUP INC	HCSG	12/08/04	\$ 55,760.00	\$ 6.195	\$ 17.69	\$ 159,210.60	\$ 103,450.60* LT		
2,250.0085			12/08/04	13,940.00	6.195	17.69	39,802.65	25,862.65* LT		
2,250.0085			12/08/04	13,940.00	6.195	17.69	39,802.65	25,862.65* LT		
2,250.0085			12/08/04	13,940.00	6.195	17.69	39,802.65	25,862.65* LT		
2,250.0085			12/08/04	13,940.00	6.195	17.69	39,802.65	25,862.65* LT		
2,250.0085			12/08/04	13,940.00	6.195	17.69	39,802.65	25,862.65* LT		
282.376			12/08/04	1,749.47	6.195	17.69	4,995.23	3,245.76* LT		
4,414.351			06/07/05	38,394.90	8.697	17.69	78,089.87	39,694.97* LT		
2,335.6744			06/07/05	20,315.10	8.697	17.69	41,318.08	21,002.98* LT		
12,179.2962			10/31/05	100,898.32	8.284	17.69	215,451.75	114,553.43* LT		
11,250.0427			11/18/05	101,150.00	8.991	17.69	199,013.26	97,863.26* LT		
20,925.0795			03/14/06	180,420.00	8.622	17.69	370,164.66	189,744.66* LT		
8,997.784			03/14/06	77,580.60	8.622	17.69	159,170.80	81,590.20* LT		
22,500.0904			10/20/06	277,900.00	12.351	17.69	398,026.60	120,126.60* LT		
224.370				1,450,217.93	6.464		3,969,105.31	2,518,887.38	3.817	143,598.80
Total common stocks and options				\$ 1,450,217.93			\$ 3,969,105.31	\$ 2,518,887.38	3.817	\$ 143,598.80

Statement 5 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	Amount
ADJUST STOCK BASIS TO ACTUAL	\$ 161,649
TOTAL	\$ 161,649

Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000

<u>Name of Manager</u>	<u>Amount</u>
BARTON WEISMAN	\$ <u>380,250</u>
TOTAL	\$ <u><u>380,250</u></u>

Federal Statements

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

Name		Address		Relationship	Status	Purpose	Amount
Address							
ADOPH & ROSE LEVIS JCC		9801 DONNA KLEIN BLVD				COMMUNITY SERVICES	10,000
BOCA RATON FL 33428	N/A	PUBLIC					
AMERICAN FRIENDS OF MAGEN DAVID ADO		3300 PGA BLVD. SUITE 510				MEDICAL CARE	10,000
PALM BEACH GARDENS FL 334	N/A	PUBLIC					
AMERICAN HEART ASSOCIATION		7272 GREENVILLE AVE				FIGHT CARDIOVASCULAR DISEASES/STROKE	650
DALLAS TX 75231	N/A	PUBLIC					
ANTI DEFAMAITON LEAGUE		605 THIRD AVE				FIGHT ALL FORMS OF BIGOTRY	10,000
NEW YORK NY 10158	N/A	PUBLIC					
BROWARD CENTER FOR PERFORMING ARTS		201 SW 5TH AVE				SECURE FUTURE OF PERFORMING ARTS	2,500
FORT LAUDERDALE FL 33312	N/A	PUBLIC					
CONGREGATION B'NAI ISRAEL		2200 YAMATO RD				GENERAL	10,200
BOCA RATON FL 33431	N/A	PUBLIC					
HADASSAH		50 WEST 58TH ST				EDUCATION & MEDICAL ASSISTANCE	1,000
NEW YORK NY 10019	N/A	PUBLIC					
HANDS ON TZEDAKAH		2901 CLINT MOORE ROAD				SUPPORT LIFE SUSTAINING PROGRAMS	20,000
BOCA RATON FL 33496	N/A	PUBLIC					
JAFCO		4200 NORTH UNIVERISTY DR				ADOPTION & FOSTER CARE SERVICES	10,000
SUNRISE FL 33351	N/A	PUBLIC					
JEWISH FEDERATION S. PBC		9901 DONNA KLEIN BLVD				IMPROVE WELFARE OF JEWISH PEOPLE	100,000
BOCA RATON FL 33428	N/A	PUBLIC					
LEHIGH UNIVERSITY		27 MEMORIAL DRIVE WEST				EDUCATIONAL	2,000
BETHLEHEM PA 18015	N/A	PUBLIC					
MORGAN PRESSEL FOUNDATION		PO BOX 480157				CANCER RESEARCH AND DETECTION	975
DELRAY BEACH FL 33448	N/A	PUBLIC					
NEW JERSEY PPC TF		1304 LAUREL OAK ROAD				MEDICAL ASSISTANCE TO CHILDREN	5,000
VOORHEES NJ 08043	N/A	PUBLIC					
PLAY FOR PINK		60 EAST 56TH ST				CANCER RESEARCH	500
NEW YORK NY 10022	N/A	PUBLIC					
RUTH RALES JEWISH FAMILY		21300 RUTH & BARON COLEMA				FOOD, FINANCIAL & SENIOR ASSISTANCE	220,000
BOCA RATON FL 33428	N/A	PUBLIC					
SIMON WIESENTHAL CENTER		1399 SOUTH ROXBURY				HUMAN RIGHTS ORGANIZATION	1,000
LOS ANGELES CA 90035	N/A	PUBLIC					
SPBCC NATIONAL PARKINSON FOUNDATION		1501 NW 9TH AVE				PARKINSON'S MEDICAL CARE & TREATMENT	5,000
MIAMI FL 33136	N/A	PUBLIC					
TEMPLE BAT YAM		5151 NE 14TH TERRACE				GENERAL	9,220
FT LAUDERDALE FL 33334	N/A	PUBLIC					
THE SOREF JEWISH COMMUNITY CENTER		6501 WEST SUNRISE BLVD				COMMUNITY SUPPORT	1,500
PLANTATION FL 33313	N/A	PUBLIC					

Federal Statements

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

Name		Address		Relationship	Status	Purpose	Amount
Address							
TRUSTEES OF UNIVERSITY OF PENN PHILADELPHIA PA 19104	N/A	3451 WALNUT STREET PUBLIC	EDUCATIONAL				1,000
US HOLOCAUST MEMORIAL MUSEUM WASHINGTON DC 20024	N/A	100 RAOUL WALLENBERG PLAC PUBLIC	PROVIDE KNOWLEDGE ON HOLOCAUST				6,000
TOTAL							426,545

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on e-file for Charities & Nonprofits.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension-check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions BARTON AND SHIRLEY WEISMAN FOUNDATION, INC.	Employer identification number (EIN) or <input checked="" type="checkbox"/> 58-2684069
	Number, street, and room or suite no. If a P.O. box, see instructions 17603 LAKE ESTATES DRIVE	Social security number (SSN) <input type="checkbox"/>
	City, town or post office, state, and ZIP code. For a foreign address, see instructions BOCA RATON FL 33496	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	01	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**SHIRLEY WEISMAN
17603 LAKE ESTATES DR.**

- The books are in the care of ►
- BOCA RATON**

FL 33496

Telephone No. ►

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box
- ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN)
- ☐
- If this is for the whole group, check this box
- ☐
- If it is for part of the group, check this box
- ☐
- and attach

a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **08/15/12**, to file the exempt organization return for the organization named above. The extension is for the organization's return for.

► ☒ calendar year **2011** or► ☐ tax year beginning _____, and ending _____

- 2 If the tax year entered in line 1 is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	0
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0

Caution If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions