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

2011

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 04/01, 2011, and ending 03/31, 2012

Name of foundation
THE JOELSON FOUNDATION

Number and street (or P O box number if mail is not delivered to street address) Room/suite
C/O WITHUMSMITH+BROWN, P.C. ATTN: DON SCHEIER

City or town, state, and ZIP code
PRINCETON, NJ 08540-6313

A Employer identification number
 13-6220799

B Telephone number (see instructions)
 (609) 520-1188
 EXT 1117

C If exemption application is pending, check here

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

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ **18,867,578.**

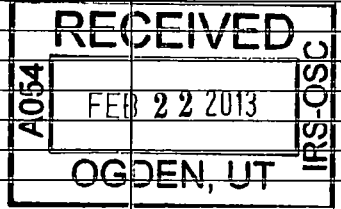
J Accounting method Cash Accrual
 Other (specify) _____
 (Part I, column (d) must be on cash basis)

D 1 Foreign organizations, check here
 2 Foreign organizations meeting the 85% test, check here and attach computation

E If private foundation status was terminated under section 507(b)(1)(A), check here

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

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)	123,715.			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1,199.	1,199.		ATCH 1
	4 Dividends and interest from securities	511,858.	511,858.		ATCH 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	195,894.			
	b Gross sales price for all assets on line 6a	1,635,042.			
	7 Capital gain net income (from Part IV, line 2)		195,894.		
	8 Net short-term capital gain				
	9 Income modifications				
	10 a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	28,537.	2,245.		ATCH 3	
12 Total. Add lines 1 through 11	861,203.	711,196.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	165,000.	24,750.		140,250.
	14 Other employee salaries and wages	54,080.	8,112.		45,968.
	15 Pension plans, employee benefits	25,768.	3,865.		21,903.
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) ^{ATCH 4}	3,500.	525.		2,975.
	c Other professional fees (attach schedule) *	38,703.	37,351.		1,352.
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	-41,378.	6,958.		4,619.
	19 Depreciation (attach schedule) and depletion	629.	94.		
	20 Occupancy	69,989.	10,498.		59,491.
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) ^{ATCH 7}	17,174.	10,080.		6,545.
	24 Total operating and administrative expenses. Add lines 13 through 23	333,465.	102,233.		283,103.
	25 Contributions, gifts, grants paid	828,386.			828,386.
26 Total expenses and disbursements. Add lines 24 and 25	1,161,851.	102,233.	0	1,111,489.	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-300,648.				
b Net investment income (if negative, enter -0-)		608,963.			
c Adjusted net income (if negative, enter -0-)					



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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		17,305.		
	2	Savings and temporary cash investments		1,189,357.	1,041,739.	1,041,739.
	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				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10 a	Investments - U.S. and state government obligations (attach schedule)				
	b	Investments - corporate stock (attach schedule) ATCH 8		14,278,366.	14,465,857.	15,501,301.
	c	Investments - corporate bonds (attach schedule)				
	11	Investments - land, buildings, and equipment basis				ATCH 9
	Less accumulated depreciation (attach schedule)					
12	Investments - mortgage loans					
13	Investments - other (attach schedule) ATCH 10		1,455,647.	1,142,990.	2,308,297.	
14	Land, buildings, and equipment basis		33,727.			
	Less accumulated depreciation (attach schedule)		30,847.	370.	2,880.	
15	Other assets (describe ATCH 11)		13,361.	13,361.	13,361.	
16	Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)		16,954,406.	16,666,827.	18,867,578.	
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 ATCH 12)		441.		
23	Total liabilities (add lines 17 through 22)		441.		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/>			and complete lines 24 through 26 and lines 30 and 31.		
	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		19,282,895.	19,282,895.	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
29	Retained earnings, accumulated income, endowment, or other funds		-2,328,930.	-2,616,068.		
30	Total net assets or fund balances (see instructions)		16,953,965.	16,666,827.		
31	Total liabilities and net assets/fund balances (see instructions)		16,954,406.	16,666,827.		

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	16,953,965.
2	Enter amount from Part I, line 27a	2	-300,648.
3	Other increases not included in line 2 (itemize) ATTACHMENT 13	3	236,938.
4	Add lines 1, 2, and 3	4	16,890,255.
5	Decreases not included in line 2 (itemize) ATTACHMENT 14	5	223,428.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	16,666,827.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo., day, yr)
1a	SEE PART IV SCHEDULE			
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	195,894.
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	0

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	1,047,114.	17,722,469.	0.059084
2009	670,007.	16,110,131.	0.041589
2008	867,282.	17,023,338.	0.050947
2007	916,554.	21,692,302.	0.042253
2006	785,298.	20,160,178.	0.038953
2	Total of line 1, column (d)	2	0.232826
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	0.046565
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	18,346,872.
5	Multiply line 4 by line 3	5	854,322.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	6,090.
7	Add lines 5 and 6	7	860,412.
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	1,114,157.

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)	1
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)	
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2
3 Add lines 1 and 2	3 6,090.
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 6,090.
6 Credits/Payments	
a 2011 estimated tax payments and 2010 overpayment credited to 2011	6a 11,987.
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 11,987.
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
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10 5,897.
11 Enter the amount of line 10 to be Credited to 2012 estimated tax <input type="checkbox"/> 5,897. Refunded <input type="checkbox"/> 11	11

Part VII-A Statements Regarding Activities		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		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)? <i>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</i>	1b		X
c Did the foundation file Form 1120-POL for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	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? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> NY,			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	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)? <i>If "Yes," complete Part XIV</i>	9		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> ATTACHMENT 15	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? 13 X
Website address NOT APPLICABLE
14 The books are in care of BARBARA J FIFE Telephone no 212-246-0230
Located at 1841 BROADWAY SUITE 1008 NEW YORK, NY ZIP + 4 10023-7646
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here 15
and enter the amount of tax-exempt interest received or accrued during the year 15
16 At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 16 Yes No X
See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country

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.

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

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
ATTACHMENT 16		165,000.	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

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	14,960,144.
b	Average of monthly cash balances	1b	1,126,961.
c	Fair market value of all other assets (see instructions)	1c	2,539,161.
d	Total (add lines 1a, b, and c)	1d	18,626,266.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	18,626,266.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	279,394.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	18,346,872.
6	Minimum investment return. Enter 5% of line 5	6	917,344.

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	917,344.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	6,090.
b	Income tax for 2011 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	6,090.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	911,254.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	911,254.
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	911,254.

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	1,111,489.
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	2,668.
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	1,114,157.
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	6,090.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,108,067.

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				911,254.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			763,898.	
b Total for prior years 20 09 20 08 20 07				
3 Excess distributions carryover, if any, to 2011				
a From 2006				
b From 2007				
c From 2008				
d From 2009				
e From 2010				
f Total of lines 3a through e				
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 1,114,157.				
a Applied to 2010, but not more than line 2a			763,898.	
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				350,259.
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see 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				560,995.
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)				
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a		0		
10 Analysis of line 9				
a Excess from 2007				
b Excess from 2008				
c Excess from 2009				
d Excess from 2010				
e Excess from 2011				

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

NOT APPLICABLE

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

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				(e) Total
	(a) 2011	(b) 2010	(c) 2009	(d) 2008	
2 a 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))

NONE

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

NONE

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

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<p><i>a Paid during the year</i></p> <p>ATTACHMENT 17</p>				
Total				▶ 3a 828,386.
<p><i>b Approved for future payment</i></p>				
Total				▶ 3b

Schedule of Contributors

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

2011

Name of the organization THE JOELSON FOUNDATION	Employer identification number 13-6220799
--	--

Organization type (check one)

- | | | |
|--------------------|-------------------------------------|--|
| Filers of: | Section: | |
| Form 990 or 990-EZ | <input type="checkbox"/> | 501(c)() (enter number) organization |
| | <input type="checkbox"/> | 4947(a)(1) nonexempt charitable trust not treated as a private foundation |
| | <input type="checkbox"/> | 527 political organization |
| Form 990-PF | <input checked="" type="checkbox"/> | 501(c)(3) exempt private foundation |
| | <input type="checkbox"/> | 4947(a)(1) nonexempt charitable trust treated as a private foundation |
| | <input type="checkbox"/> | 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 THE JOELSON FOUNDATION	Employer identification number 13-6220799
--	---

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	GRT. GRAND CHARIT. LEAD UNITRUST C/O WITHUMSMITH+BROWN, 465 SOUTH STREET MORRISTOWN, NJ 07960-6497	\$ 123,715.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash 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 THE JOELSON FOUNDATION

Employer identification number

13-6220799

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

Name of organization THE JOELSON FOUNDATION

Employer identification number
13-6220799

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry.

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once See instructions) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
_____ _____ _____		_____ _____ _____	
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
_____ _____ _____		_____ _____ _____	
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
_____ _____ _____		_____ _____ _____	
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
_____ _____ _____		_____ _____ _____	

FORM 990PF, PART VII-A, LINE 10 - NEW SUBSTANTIAL CONTRIBUTORS

ATTACHMENT 15

<u>NAME AND ADDRESS</u>	<u>DATE</u>	<u>DIRECT PUBLIC SUPPORT</u>
GRT. GRAND CHARIT. LEAD UNITRUST C/O WITHUMSMITH+BROWN, 465 SOUTH STREET MORRISTOWN, NJ 07960-6497	12/29/2011	123,715.
<u>TOTAL CONTRIBUTION AMOUNTS</u>		<u>123,715.</u>

ATTACHMENT 1

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
FIDELITY CASH RESERVES	89.	89.
INTERNAL REVENUE SERVICE	479.	479.
CHANCELLOR PARTNERSHIP	184.	184.
INVESCO NON-US PARTNERSHIP	161.	161.
INVESCO VENTURE PARTNERSHIP	286.	286.
TOTAL	<u>1,199.</u>	<u>1,199.</u>

ATTACHMENT 2

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
FIDELITY INVESTMENTS	207,192.	207,192.
PERSHING	32,790.	32,790.
MAINSTAY HIGH YIELD CORP BOND FUND	270,494.	270,494.
CHANCELLOR PARTNERSHIP	223.	223.
INVESCO NON-US PARTNERSHIP	24.	24.
INVESCO VENTURE PARTNERSHIP	1,135.	1,135.
TOTAL	<u>511,858.</u>	<u>511,858.</u>

ATTACHMENT 3

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
CHANCELLOR PARTNERSHIP	27,635.	21.
INVESCO NON-US PARTNERSHIP	121.	121.
INVESCO VENTURE PARTNERSHIP	721.	
INVESCO VENTURE PARTNERSHIP OTHER INCOME	55.	55.
CHANCELLOR PARTNERSHIP - ROYALTIES	20.	
ADJ: WASH SALE LOSSES 1334 SHS PEP BOYS		2,048.
INVESCO VENTURE PARTNERSHIP 1231 LOSS	-15.	
TOTALS	<u>28,537.</u>	<u>2,245.</u>

ATTACHMENT 4

FORM 990PF, PART I - ACCOUNTING FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
WITHUMSMITH+BROWN, P.C.	3,500.	525.		2,975.
TOTALS	<u>3,500.</u>	<u>525.</u>		<u>2,975.</u>

ATTACHMENT 5

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>CHARITABLE PURPOSES</u>
PERSHING INVESTMENT MGMT FEE	35,622.	35,622.	
INVESCO MANAGEMENT FEE	1,125.	1,125.	
CT CORPORATION	365.	365.	
COMPUTER CONSULTING	1,591.	239.	1,352.
TOTALS	<u>38,703.</u>	<u>37,351.</u>	<u>1,352.</u>

ATTACHMENT 6

FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>CHARITABLE PURPOSES</u>
REAL ESTATE TAXES	5,434.	815.	4,619.
FOREIGN TAXES	5,643.	5,643.	
FEDERAL TAX REFUND	-52,955.		
STATE OF DELAWARE	500.	500.	
TOTALS	<u>-41,378.</u>	<u>6,958.</u>	<u>4,619.</u>

ATTACHMENT 7

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
BANK CHARGES	165.	165.	
CREDIT CARD ANNUAL FEE	74.	11.	63.
COMMERCIAL INSURANCE	2,110.	317.	1,793.
NYS DEPT OF LAW-ANNUAL FILING	57.		57.
NY LAW JOURNAL-PUBLIC NOTICE	130.		130.
OFFICE EXPENSES	641.		545.
OFFICE SUPPLIES	253.		215.
POSTAGE	385.		327.
INVESTMENT ADR FEES	29.		
TELEPHONE & ON-LINE EXPENSES	3,200.	480.	2,720.
BUSINESS GIFTS	170.	25.	145.
INVESCO VENTURE PARTNERSHIP	5,948.	5,948.	
INVESCO VENTURE - SECTION 179	3.		
INVESCO NON-US PARTNERSHIP	920.	920.	
CHANCELLOR PARTNERSHIP	2,442.	1,896.	
OFFICE EQUIPMENT RENTAL	647.	97.	550.
TOTALS	<u>17,174.</u>	<u>10,080.</u>	<u>6,545.</u>

FORM 990PF, PART II - CORPORATE STOCKATTACHMENT 8

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
ARTISAN INTERNATIONAL FUND	1,955,792.	1,913,044.	2,315,227.
BANK OF AMERICA	36,607.	36,607.	28,385.
BRITISH POUND	94.		
CANADIAN TIRE LTD	32,644.	50,299.	55,932.
CAREFUSION	29,264.	51,022.	53,571.
CITIGROUP INC	27,867.	58,107.	59,686.
COCA COLA ENTERPRISE	27,896.		
COTT CORP	25,933.	44,984.	36,634.
COVIDIEN PLC	39,785.	43,683.	80,270.
CROWN HOLDINGS INC	47,599.	54,340.	106,733.
CSX CORPORATION	10,870.		
CVS CAREMARK CORP	57,421.	15,236.	23,027.
DEMAG CRANES AG WETT	39,478.		
DIAGEO PLC	17,739.		
DARLING INTL INC		27,754.	30,241.
GOODYEAR	36,876.		
GROUP AEROPLAN INC	52,971.	65,421.	93,993.
HEINEKEN	55,243.		
HEWLETT PACKARD CO	64,466.	112,253.	73,396.
ISHARES BARCLAYS 1 - 3	999,611.	999,611.	1,011,840.
ISHARES BARCLAYS INTERM	1,519,350.	1,519,350.	1,589,210.
ISHARES MSCI EAFE INDEX	684,659.	684,659.	669,658.
JP MORGAN CHASE & CO	59,409.	46,756.	63,636.
KRAFT FOODS INC CL A	50,155.		
MAINSTAY HIGH YIELD CORP BD FD	4,126,679.	4,397,173.	3,958,473.
MASTERCARD INC CL A	32,033.		
METHANEX CORP	32,922.		
MFA FINANCIAL	28,191.	28,191.	27,661.
MOLSON COORS BREWING	61,640.	55,849.	57,332.

ATTACHMENT 8 (CONT'D)FORM 990PF, PART II - CORPORATE STOCK

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
MICROSOFT CORP		51,670.	61,994.
ORACLE CORP	32,077.	38,383.	41,903.
PEP BOYS	57,222.	15,336.	18,023.
S&P 500 DEPOSITORY	964,502.	964,502.	1,199,701.
SERVICE CORP INTL	36,461.	47,118.	74,879.
SIEMENS AG	36,772.	26,316.	22,595.
SLM CORP	29,358.	13,878.	18,991.
SPARTAN 500 INDEX	978,613.	966,820.	1,317,749.
TARGET CORP	66,407.	58,340.	67,885.
TE CONNECTIVITY LTD	29,251.		
TELEFLEX INC	59,856.	33,586.	43,845.
TNT NV	27,666.		
UNILEVER NV	56,219.	56,219.	65,440.
VANGUARD EMERG MKT VIPER	707,273.	707,273.	734,643.
VANGUARD INDEX MID CAP	262,077.	262,077.	326,230.
VANGUARD INDEX SMALL CAP	438,401.	438,401.	543,168.
VANGUARD I TM TREASURY ADMIRAL	285,200.	292,136.	308,040.
WELLPOINT INC	57,817.	68,635.	87,232.
DIRECTV COM		73,057.	81,756.
GAMESTOP CORP		38,052.	33,524.
GOOGLE INC		45,116.	50,017.
SANOFI SPONS ADR		64,603.	68,781.
TOTALS	<u>14,278,366.</u>	<u>14,465,857.</u>	<u>15,501,301.</u>

INVESTMENTS - LAND, BUILDINGS, EQUIPMENT

ATTACHMENT 9

FIXED ASSET DETAIL ACCUMULATED DEPRECIATION DETAIL

ASSET DESCRIPTION	METHOD/ CLASS	FIXED ASSET DETAIL			ACCUMULATED DEPRECIATION DETAIL				
		BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE	BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE
FURNITURE	M7	7,625			7,625	7,625			7,625
COMPUTER EQUIP	M5	3,364			3,364	3,364			3,364
SOFTWARE	M3	3,575			3,575	3,575			3,575
FURNITURE	M7	1,549			1,549	1,549			1,549
COMPUTER	M5	4,985			4,985	4,985			4,985
TYPEWRITER	M5	444			444	444			444
SOFTWARE	M3	8,306			8,306	8,306			8,306
FURNITURE	M7	740			740	371	106		477
COMPUTER SOFTWARE	M3	3,139			3,139		523		523
TOTALS		<u>33,727</u>			<u>33,727</u>	<u>30,218</u>			<u>30,847</u>

ATTACHMENT 10

FORM 990PF, PART II - OTHER INVESTMENTS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
AHAB OPPORTUNITY LTD	909,511.	581,405.	1,373,860.
AHAB REDEMPTION FUND LTD		197,040.	723,792.
CHANCELLOR PARTNERSHIP FUND LP	218,869.	100,160.	62,848.
JOELSON INVESTMENT LLC:			
(1) INVESCO VENTURE PARTNERSHIP	287,019.	202,571.	116,728.
(2) INVESCO NON-US PARTNERSHIP	40,248.	61,814.	31,069.
TOTALS	<u>1,455,647.</u>	<u>1,142,990.</u>	<u>2,308,297.</u>

ATTACHMENT 11

FORM 990PF, PART II - OTHER ASSETS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
RENTAL SECURITY DEPOSIT	13,361.	13,361.	13,361.
TOTALS	<u>13,361.</u>	<u>13,361.</u>	<u>13,361.</u>

ATTACHMENT 12

FORM 990PF, PART II - OTHER LIABILITIES

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>
NY STATE TAX W/H PAYABLE	441.	
TOTALS	<u>441.</u>	<u></u>

ATTACHMENT 13FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

<u>DESCRIPTION</u>	<u>AMOUNT</u>
INVESCO VENTURE PARTNERSHIP BOOK/TAX ADJ	47,386.
INVESCO NON-US PARTNERSHIP BOOK/TAX ADJ	31,606.
AHAB REDEMPTION BOOK/TAX ADJ	131,066.
OTHER ADJUSTMENTS	26,880.
TOTAL	<u>236,938.</u>

ATTACHMENT 14FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

<u>DESCRIPTION</u>	<u>AMOUNT</u>
PRIOR YEAR BOOK/TAX BASIS ADJ	140,742.
CHANCELLOR PARTNERSHIP BOOK/TAX ADJ	54,500.
INVESCO VENTURE POST DISTRIBUTION	14,918.
INVESCO NON-US POST DISTRIBUTION	13,268.
TOTAL	<u>223,428.</u>

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 16

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>
BARBARA J FIFE 1841 BROADWAY, SUITE 1008 NEW YORK, NY 10023-7646	PRESIDENT 35.00	165,000.
JOSEPH C MITCHELL C/O WITHUMSMITH+BROWN, P.C. 5 VAUGHN DRIVE PRINCETON, NJ 08540	TREASURY/SECRETARY 1.00	0
STEPHEN FIFE 1841 BROADWAY, SUITE 1008 NEW YORK, NY 10023-7646	DIRECTOR 1.00	0
<u>GRAND TOTALS</u>		<u>165,000.</u>

FORM 990EF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 17

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SEE ATTACHED SCHEDULE OF CONTRIBUTIONS	NONE	SEE ATTACHED	828,386
SEE ATTACHED	501(C)(3)		
SEE ATTACHED			
SEE ATTACHED, 00 ATTACHED			

TOTAL CONTRIBUTIONS PAID

828,386

Part I, Line 25-Contributions, Gifts, Grants Paid
Part XV, Line 3a-Grants and Contributions Paid During the Year
1/23/2013

The Joelson Foundation
E.I.N. 13-6220799
For Tax Year Beginning 4/1/11 and Ending 3/31/12

Charity	Address	Payee Tax Statuses and Dates	Support Type	Amount
AHRC New York City Foundation, Inc.	83 Maiden Lane New York, NY 10038	501c(3)	General Operating Support	\$300.00
Alliance to Protect Nantucket Sound, Inc.	4 Barnstable Road Hyannis, MA 02601-3900	501c(3)	General Operating Support	\$500.00
American Ballet Theatre	890 Broadway, 3rd Floor New York, NY 10003-1278	501c(3)	General Operating Support	\$1,500.00
American Cancer Society, Oklahoma City	P.O. Box 22718 Oklahoma City, OK 73123-1718	501c(3)	General Operating Support	\$2,000.00
American Cancer Society Inc., Nassau Region	6800 Jericho Turnpike, Suite 200 West Syosset, NY 11791	501c(3)	Project Support	\$500.00
American Jewish World Service, Inc.	45 West 36th Street New York, NY 10018	501c(3)	General Operating Support	\$1,000.00
American Pardes Foundation	Five West 37th Street, Suite 802 New York, NY 10018	501c(3)	General Operating Support	\$500.00
Amherst College	P.O. Box 5000 Amherst, MA 01002-5000	501c(3)	Project Support	\$2,000.00
Archer School for Girls, Inc.	11725 Sunset Boulevard Los Angeles, CA 90049	501c(3)	General Operating Support	\$2,950.00
Archer School for Girls, Inc.	11725 Sunset Boulevard Los Angeles, CA 90049	501c(3)	General Operating Support	\$300.00
Archer School for Girls, Inc.	11725 Sunset Boulevard Los Angeles, CA 90049	501c(3)	General Operating Support	\$250.00
Archer School for Girls, Inc.	11725 Sunset Boulevard Los Angeles, CA 90049	501c(3)	General Operating Support	\$2,200.00
Artbarn Community Theater	PO Box 470504 Brookline Village, MA 02447	501c(3)	General Operating Support	\$500.00
ASPCA	424 East 92nd Street New York, NY 10128-6804	501c(3)	General Operating Support	\$500.00
Atlantic Theater Company	Administrative Offices 76 Ninth Avenue, Suite 537 New York, NY 10011	501c(3)	General Operating Support	\$550.00
Atlantic Theater Company	Administrative Offices 76 Ninth Avenue, Suite 537 New York, NY 10011	501c(3)	Project Support	\$1,500.00

Charity	Address	Payee Tax Statuses and Dates	Support Type	Amount
Autism Speaks	1 East 33rd Street, 4th Floor New York, NY 10016	501c(3)	General Operating Support	\$2,500.00
Ballet Hispanico	167 West 89th Street New York, NY 10024	501c(3)	General Operating Support	\$2,500.00
Baruch College	One Bernard Baruch Way Box A-1603 New York, NY 10010-5585	501c(3)	General Operating Support	\$3,000.00
Baruch College	One Bernard Baruch Way Box A-1603 New York, NY 10010-5585	501c(3)	General Operating Support	\$2,500.00
A Better Balance	80 Maiden Lane, Suite 606 New York, NY 10038	501c(3)	General Operating Support	\$1,000.00
Betty Ford Center Foundation	41990 Cook Street, Suite C301 Palm Desert, CA 92211	501c(3)	General Operating Support	\$150.00
Big Apple Circus	One Metrotech Center, 3rd Floor Brooklyn, NY 11201-3949	501c(3)	General Operating Support	\$3,000.00
Boston University/Trustees of Boston University	President/Dev. & Alumni Relations One Sherborn Street, 8th Floor Boston, MA 02215	501c(3)	General Operating Support	\$4,000.00
Boston University/Trustees of Boston University	President/Dev. & Alumni Relations One Sherborn Street, 8th Floor Boston, MA 02215	501c(3)	Project Support	\$1,000.00
The Brearley School	610 East 83rd Street New York, NY 10028-7988	501c(3)	Project Support	\$1,000.00
The Brearley School	610 East 83rd Street New York, NY 10028-7988	501c(3)	Project Support	\$15,000.00
Breast Cancer Research Foundation	60 East 56th Street, 8th Floor New York, NY 10022	501c(3)	General Operating Support	\$4,000.00
Breast Cancer Research Foundation	60 East 56th Street, 8th Floor New York, NY 10022	501c(3)	Project Support	\$1,000.00
Breast Cancer Research Foundation	60 East 56th Street, 8th Floor New York, NY 10022	501c(3)	General Operating Support	\$2,000.00
BronxWorks	60 East Tremont Avenue Bronx, NY 10453	501c(3)	General Operating Support	\$200.00
BronxWorks	60 East Tremont Avenue Bronx, NY 10453	501c(3)	General Operating Support	\$500.00
Brooklyn Academy of Music, Inc.	Peter Jay Sharp Building 30 Lafayette Avenue Brooklyn, NY 11217-1486	501c(3)	General Operating Support	\$2,500.00

Charity	Address	Payee Tax Statuses and Dates	Support Type	Amount
Brooklyn Botanic Garden	1000 Washington Avenue Brooklyn, NY 11225-1099	501c(3)	General Operating Support	\$2,500.00
Brown University	Box 1893, 110 Elm Street Providence, RI 02912	501c(3)	Project Support	\$1,000.00
Brown University	Box 1893, 110 Elm Street Providence, RI 02912	501c(3)	Project Support	\$2,000.00
Brown University	Box 1893, 110 Elm Street Providence, RI 02912	501c(3)	General Operating Support	\$2,500.00
Brown University	Box 1893, 110 Elm Street Providence, RI 02912	501c(3)	General Operating Support	\$20,000.00
Bryn Mawr College	Helfarian 101 North Merion Avenue Bryn Mawr, PA 19010-2899	501c(3)	General Operating Support	\$10,000.00
Bryn Mawr College	Helfarian 101 North Merion Avenue Bryn Mawr, PA 19010-2899	501c(3)	General Operating Support	\$5,000.00
Bryn Mawr College	Helfarian 101 North Merion Avenue Bryn Mawr, PA 19010-2899	501c(3)	General Operating Support	\$500.00
Center for Jewish Culture and Creativity	423 North Palm Drive, Suite 102 Beverly Hills, CA 90210	501c(3)	General Operating Support	\$1,500.00
Center for Jewish Culture and Creativity	423 North Palm Drive, Suite 102 Beverly Hills, CA 90210	501c(3)	General Operating Support	\$1,500.00
Center for Jewish Culture and Creativity	423 North Palm Drive, Suite 102 Beverly Hills, CA 90210	501c(3)	Project Support	\$2,000.00
Central Park Conservancy	14 East 60th street New York, NY 10022	501c(3)	General Operating Support	\$2,000.00
Central Park Conservancy	14 East 60th street New York, NY 10022	501c(3)	General Operating Support	\$2,000.00
Central Synagogue	123 East 55th Street New York, NY 10022-3502	501c(3)	Project Support	\$2,000.00
Children's Hospital Boston	c/o Children's Hospital Trust 1 Autumn Street Boston, MA 02115-5301	501c(3)	General Operating Support	\$500.00
Citizens Union Foundation	299 Broadway, Suite 700 New York, NY 10007	501c(3)	General Operating Support	\$1,000.00
Citizens Union Foundation	299 Broadway, Suite 700 New York, NY 10007	501c(3)	General Operating Support	\$2,500.00
City Harvest, Inc.	575 Eighth Avenue, 4th Floor New York, NY 10018-3069	501c(3)	General Operating Support	\$1,000.00

Charity	Address	Payee Tax Statuses and Dates	Support Type	Amount
City Parks Foundation	830 Fifth Avenue New York, NY 10065-7001	501c(3)	General Operating Support	\$5,000.00
City Parks Foundation	830 Fifth Avenue New York, NY 10065-7001	501c(3)	General Operating Support	\$1,000.00
City Parks Foundation	830 Fifth Avenue New York, NY 10065-7001	501c(3)	General Operating Support	\$2,500.00
Coalition for the Homeless	129 Fulton Street New York, NY 10038	501c(3)	General Operating Support	\$500.00
Columbia University	2960 Broadway 305 Dodge Hall, MC 1803 New York, NY 10027	501c(3)	General Operating Support	\$1,000.00
Columbia University	2960 Broadway 305 Dodge Hall, MC 1803 New York, NY 10027	501c(3)	Project Support	\$50,000.00
Community Service Society	105 East 22nd Street New York, NY 10010	501c(3)	General Operating Support	\$2,000.00
Community Service Society	105 East 22nd Street New York, NY 10010	501c(3)	General Operating Support	\$1,500.00
Community Service Society	105 East 22nd Street New York, NY 10010	501c(3)	General Operating Support	\$1,500.00
Congregation Rodeph Sholom	7 West 83rd Street New York, NY 10024	501c(3)	General Operating Support	\$4,200.00
Congregation Rodeph Sholom	7 West 83rd Street New York, NY 10024	501c(3)	General Operating Support	\$4,000.00
Congregation Shirat Ha Yam	PO Box 1145 Nantucket, MA 02554	501c(3)	General Operating Support	\$1,500.00
Dana-Farber Cancer Institute	Division of Development & The Jimmy Fund 10 Brookline Place West, 6th Floor Brookline, MA 02445-7226	501c(3)	General Operating Support	\$500.00
Dance Theatre of Harlem	466 West 152nd Street New York, NY 10031-1814	501c(3)	General Operating Support	\$1,000.00
Fayerweather Street School	765 Concord Avenue Cambridge, MA 02138	501c(3)	General Operating Support	\$500.00
Food Bank for New York City	39 Broadway, 10th Floor New York, NY 10006	501c(3)	General Operating Support	\$1,000.00
Gordon Research Conferences	Attention: Conference Support 512 Liberty Lane West Kingston, RI 02892	501c(3)	Project Support	\$3,000.00
Harvard University	124 Mount Auburn Street Cambridge, MA 02138-5795	501c(3)	Project Support	\$2,000.00

Charity	Address	Payee Tax Statuses and Dates	Support Type	Amount
Harvard University	124 Mount Auburn Street Cambridge, MA 02138-5795	501c(3)	Project Support	\$10,000.00
Harvard University	124 Mount Auburn Street Cambridge, MA 02138-5795	501c(3)	General Operating Support	\$500.00
HEAF: Harlem Educational Activities Fund, Inc.	2090 Seventh Avenue, 10th Floor New York, NY 10027	501c(3)	General Operating Support	\$2,500.00
HHREC: Holocaust & Human Rights Ed. Ctr.	2900 Purchase Street Purchase, NY 10577	501c(3)	General Operating Support	\$150.00
Horace Mann School	Alumni House and Development Office 231 West 246th Street Riverdale, Bronx, NY 10471	501c(3)	General Operating Support	\$5,000.00
Horace Mann School	Alumni House and Development Office 231 West 246th Street Riverdale, Bronx, NY 10471	501c(3)	General Operating Support	\$250.00
Inner-City Scholarship Fund, Inc.	1011 First Avenue, Suite 1400 New York, NY 10022-4112	501c(3)	General Operating Support	\$2,200.00
Israel Heart Fund	c/o PSF Trader Tools, LLC 45 Rockefeller Plaza, Suite 2109 New York, NY 10111-2195	501c(3)	General Operating Support	\$1,000.00
The Jackson Laboratory	600 Main Street Bar Harbor, ME 04609-1500	501c(3)	General Operating Support	\$500.00
Jazz at Lincoln Center	33 West 60th Street New York, NY 10023	501c(3)	General Operating Support	\$1,500.00
Jewish Family & Children's Service	Headquarters 1430 Main Street Waltham, MA 02451	501c(3)	General Operating Support	\$500.00
Juvenile Diabetes Research Foundation International	26 Broadway New York, NY 10004	501c(3)	General Operating Support	\$1,000.00
KPFK	3729 Cahuenga Blvd. West North Hollywood, CA 91604	501c(3)	General Operating Support	\$250.00
LA Stage Alliance	644 South Figueroa Street Los Angeles, CA 90017	501c(3)	General Operating Support	\$150.00
Lawyers for Children, Inc.	110 Lafayette Street, 8th Floor New York, NY 10013-4116	501c(3)	General Operating Support	\$2,500.00
Lehigh University	Alumni Memorial Building 27 Memorial Drive West Bethlehem, PA 18015-3086	501c(3)	General Operating Support	\$5,000.00
Lincoln Center for the Performing Arts, Inc.	70 Lincoln Center Plaza New York, NY 10023-6583	501c(3)	Project Support	\$15,000.00

Charity	Address	Payee Tax Statuses and Dates	Support Type	Amount
Lincoln Center for the Performing Arts, Inc.	70 Lincoln Center Plaza New York, NY 10023-6583	501c(3)	General Operating Support	\$15,000.00
Lincoln Center Theater	150 West 65th Street New York, NY 10023-6975	501c(3)	General Operating Support	\$10,000.00
Make-A-Wish Foundation of Metro New York, Inc.	1111 Marcus Avenue, Suite LL22 Lake Success, NY 11042	501c(3)	General Operating Support	\$300.00
Manhattan Theatre Club	311 West 43rd Street, 8th Floor New York, NY 10036-6413	501c(3)	General Operating Support	\$20,000.00
Manhattan Theatre Club	311 West 43rd Street, 8th Floor New York, NY 10036-6413	501c(3)	General Operating Support	\$25,000.00
Manhattan Theatre Club	311 West 43rd Street, 8th Floor New York, NY 10036-6413	501c(3)	Project Support	\$50,000.00
Manhattan Theatre Club	311 West 43rd Street, 8th Floor New York, NY 10036-6413	501c(3)	General Operating Support	\$1,250.00
Manhattan Theatre Club	311 West 43rd Street, 8th Floor New York, NY 10036-6413	501c(3)	General Operating Support	\$25,000.00
Metropolitan Museum of Art	1000 Fifth Avenue New York, NY 10028-0198	501c(3)	General Operating Support	\$1,000.00
Metropolitan Museum of Art	1000 Fifth Avenue New York, NY 10028-0198	501c(3)	General Operating Support	\$400.00
Michael J. Fox Foundation for Parkinson's Research	Church Street Station PO Box 780 New York, NY 10008-0780	501c(3)	General Operating Support	\$2,500.00
Mississippi Actors Group, Inc.	1306 North Wilton Los Angeles, CA 90028	501c(3)	General Operating Support	\$4,000.00
Mississippi Actors Group, Inc.	1306 North Wilton Los Angeles, CA 90028	501c(3)	General Operating Support	\$1,500.00
Museum of Modern Art	11 West 53rd Street New York, NY 10019-5498	501c(3)	General Operating Support	\$1,000.00
Museum of Modern Art	11 West 53rd Street New York, NY 10019-5498	501c(3)	General Operating Support	\$500.00
Museum of Modern Art	11 West 53rd Street New York, NY 10019-5498	501c(3)	General Operating Support	\$1,500.00
Museum of the City of New York	1220 Fifth Avenue New York, NY 10029-5287	501c(3)	General Operating Support	\$10,000.00
Museum of the City of New York	1220 Fifth Avenue New York, NY 10029-5287	501c(3)	General Operating Support	\$5,000.00
Museum of the City of New York	1220 Fifth Avenue New York, NY 10029-5287	501c(3)	Capital Fund Support	\$40,000.00
Nantucket Atheneum	One India Street, P.O. Box 808 Nantucket, MA 02554	501c(3)	General Operating Support	\$20,000.00

Charity	Address	Payee Tax Statuses and Dates	Support Type	Amount
Nantucket Atheneum	One India Street, P.O. Box 808 Nantucket, MA 02554	501c(3)	Project Support	\$20,000.00
Nantucket Atheneum	One India Street, P.O. Box 808 Nantucket, MA 02554	501c(3)	Project Support	\$20,000.00
Nantucket Conservation Foundation, Inc.	Post Office Box 13 118 Cliff Road Nantucket, MA 02554-0013	501c(3)	General Operating Support	\$1,000.00
Nantucket Conservation Foundation, Inc.	Post Office Box 13 118 Cliff Road Nantucket, MA 02554-0013	501c(3)	General Operating Support	\$5,000.00
Nantucket Cottage Hospital	57 Prospect Street Nantucket Island, MA 02554-2799	501c(3)	General Operating Support	\$25,000.00
Nantucket Film Festival	68 Jay Street, Suite 425 Brooklyn, NY 11201	501c(3)	General Operating Support	\$1,200.00
Nantucket Historical Association	P.O. Box 1016 Nantucket, MA 02554-1016	501c(3)	General Operating Support	\$2,500.00
Nantucket Land Council	Six Ash Lane, PO Box 502 Nantucket, MA 02554	501c(3)	General Operating Support	\$1,000.00
Nantucket Preservation Trust	Two Union Street, P.O. Box 158 Nantucket Island, MA 02554	501c(3)	General Operating Support	\$1,000.00
Nantucket Preservation Trust	Two Union Street, P O. Box 158 Nantucket Island, MA 02554	501c(3)	General Operating Support	\$1,000.00
Nation Institute	116 East 16th Street, 8th Floor New York, NY 10003	501c(3)	General Operating Support	\$1,000.00
New Israel Fund	2100 M Street NW, 6th Floor Washington, DC 20037	501c(3)	General Operating Support	\$500.00
New York City Ballet, Inc.	David H. Koch Theater 20 Lincoln Center New York, NY 10023	501c(3)	General Operating Support	\$25,000.00
New York City Ballet, Inc.	David H. Koch Theater 20 Lincoln Center New York, NY 10023	501c(3)	General Operating Support	\$500.00
New York City Ballet, Inc.	David H. Koch Theater 20 Lincoln Center New York, NY 10023	501c(3)	Project Support	\$15,000.00
New York City Center	130 West 56th Street New York, NY 10019-3803	501c(3)	General Operating Support	\$7,500.00
New York City Center	130 West 56th Street New York, NY 10019-3803	501c(3)	General Operating Support	\$5,000.00
New York City Center	130 West 56th Street New York, NY 10019-3803	501c(3)	Project Support	\$26,000.00

Charity	Address	Payee Tax Statuses and Dates	Support Type	Amount
New York Junior Tennis League	58-12 Queens Boulevard, Suite 1 Woodside, NY 11377	501c(3)	General Operating Support	\$1,600.00
New York Junior Tennis League	58-12 Queens Boulevard, Suite 1 Woodside, NY 11377	501c(3)	General Operating Support	\$850.00
New York Landmarks Conservancy	One Whitehall Street New York, NY 10004	501c(3)	General Operating Support	\$1,500.00
New York League of Conservation Voters Education Fund	30 Broad Street, 30th Floor New York, NY 10004-2304	501c(3)	General Operating Support	\$5,000.00
New York League of Conservation Voters Education Fund	30 Broad Street, 30th Floor New York, NY 10004-2304	501c(3)	General Operating Support	\$15,000.00
New York Stem Cell Foundation/NYSCF	163 Amsterdam Avenue, Box 309 New York, NY 10023	501c(3)	General Operating Support	\$2,500.00
New York University Langone Medical Center	Office of Development One Park Avenue, 17th Floor New York, NY 10016-5802	501c(3)	Project Support	\$5,000.00
New York University Langone Medical Center	Office of Development One Park Avenue, 17th Floor New York, NY 10016-5802	501c(3)	Project Support	\$1,000.00
New Yorkers Against Gun Violence Education Fund	87 Lafayette Street New York, NY 10013	501c(3)	General Operating Support	\$500.00
New Yorkers Against Gun Violence Education Fund	87 Lafayette Street New York, NY 10013	501c(3)	General Operating Support	\$1,200.00
North Shore Animal League America, Inc.	16 Lewyt Street Port Washington, NY 11050	501c(3)	General Operating Support	\$500.00
NYFA: New York Foundation for the Arts	20 Jay Street, Suite 740 Brooklyn, NY 11201	501c(3)	General Operating Support	\$1,000.00
NYFA: New York Foundation for the Arts	20 Jay Street, Suite 740 Brooklyn, NY 11201	501c(3)	General Operating Support	\$3,000.00
Paul Robert Carey Foundation	20 Corporate Woods Boulevard, Suite 600 Albany, NY 12211-2396	501c(3)	General Operating Support	\$1,500.00
Pets Alive Westchester	P.O. Box 131 100 Warehouse Lane South Elmsford, NY 10523	501c(3)	General Operating Support	\$500.00
Pets Alive Westchester	P.O. Box 131 100 Warehouse Lane South Elmsford, NY 10523	501c(3)	General Operating Support	\$150.00
Phipps Community Development Corporation/Phipps Houses	902 Broadway, 13th Floor New York, NY 10010-6033	501c(3)	General Operating Support	\$1,500.00

Charity	Address	Payee Tax Statuses and Dates	Support Type	Amount
Pine Street Inn	444 Harrison Avenue Boston, MA 02118-2404	501c(3)	General Operating Support	\$1,000.00
Playwrights Horizons, Inc.	The Edith K. Ehrman Building 416 West 42nd Street New York, NY 10036-6809	501c(3)	General Operating Support	\$3,500.00
Project FIND	160 West 71st Street, Suite 2F New York, NY 10023	501c(3)	General Operating Support	\$2,000.00
Project FIND	160 West 71st Street, Suite 2F New York, NY 10023	501c(3)	General Operating Support	\$8,000.00
Project FIND	160 West 71st Street, Suite 2F New York, NY 10023	501c(3)	General Operating Support	\$10,000.00
Public Art Fund	One East 53rd Street New York, NY 10022	501c(3)	General Operating Support	\$3,500.00
Public Art Fund	One East 53rd Street New York, NY 10022	501c(3)	General Operating Support	\$4,000.00
The Public Theater	425 Lafayette Street New York, NY 10003	501c(3)	General Operating Support	\$6,000.00
Rainforest Foundation	180 Varick Street, Suite 528 New York, NY 10014	501c(3)	General Operating Support	\$1,800.00
Rainforest Foundation	180 Varick Street, Suite 528 New York, NY 10014	501c(3)	General Operating Support	\$1,800.00
Regional Plan Association	4 Irving Place, 7th Floor New York, NY 10003	501c(3)	General Operating Support	\$20,000.00
Regional Plan Association	4 Irving Place, 7th Floor New York, NY 10003	501c(3)	General Operating Support	\$5,000.00
Robin Hood Foundation	826 Broadway, 9th Floor New York, NY 10003	501c(3)	General Operating Support	\$3,000.00
Robin Hood Foundation	826 Broadway, 9th Floor New York, NY 10003	501c(3)	General Operating Support	\$1,000.00
Robin Hood Foundation	826 Broadway, 9th Floor New York, NY 10003	501c(3)	General Operating Support	\$1,000.00
Robin Hood Foundation	826 Broadway, 9th Floor New York, NY 10003	501c(3)	General Operating Support	\$2,000.00
Ronald McDonald House	405 East 73rd Street New York, NY 10021	501c(3)	General Operating Support	\$500.00
Rosie's Place	889 Harrison Avenue Boston, MA 02118	501c(3)	General Operating Support	\$2,000.00
Roundabout Theatre Company	231 West 39th Street, Suite 1200 New York, NY 10018	501c(3)	General Operating Support	\$12,000.00
Rwanda Education Assistance Project, Inc.	5 Samuel Purdy Lane Katonah, NY 10536-3404	501c(3)	General Operating Support	\$1,000.00

Charity	Address	Payee Tax Statuses and Dates	Support Type	Amount
Rwanda Education Assistance Project, Inc.	5 Samuel Purdy Lane Katonah, NY 10536-3404	501c(3)	General Operating Support	\$1,000.00
SMASH: Santa Monica Alternative School House	2525 Fifth Street Santa Monica, CA 90405	501c(3)	General Operating Support	\$500.00
Santa Monica Museum of Art	Bergamot Station G-1 2525 Michigan Avenue Santa Monica, CA 90404	501c(3)	General Operating Support	\$1,500.00
Settlement Housing Fund, Inc.	247 West 37th Street, 4th Floor New York, NY 10018	501c(3)	General Operating Support	\$5,000.00
Sholem Educational Institute	P.O. Box 4508 Culver City, CA 90231-4508	501c(3)	General Operating Support	\$1,500.00
Sierra Club Foundation	85 Second Street, Suite 750 San Francisco, CA 94105	501c(3)	General Operating Support	\$500.00
South Street Seaport Museum	12 Fulton Street New York, NY 10038	501c(3)	General Operating Support	\$2,500.00
Stephen Wise Free Synagogue	30 West 68th Street New York, NY 10023	501c(3)	General Operating Support	\$1,800.00
Stephen Wise Free Synagogue	30 West 68th Street New York, NY 10023	501c(3)	General Operating Support	\$2,286.00
Temple Sinai	50 Sewall Avenue Brookline, MA 02446-5238	501c(3)	General Operating Support	\$3,000.00
Theatre Workshop of Nantucket	P.O. Box 1297 Nantucket, MA 02554	501c(3)	General Operating Support	\$1,000.00
Trustees of Reservations	Great Point Circle, Long Hill 572 Essex Street Beverly, MA 01915-1530	501c(3)	General Operating Support	\$500.00
UJA-Federation of New York	130 East 59th Street, #16101 New York, NY 10022-1397	501c(3)	General Operating Support	\$1,000.00
UJA-Federation of New York	130 East 59th Street, #16101 New York, NY 10022-1397	501c(3)	General Operating Support	\$250.00
UJA-Federation of New York	130 East 59th Street, #16101 New York, NY 10022-1397	501c(3)	General Operating Support	\$3,500.00
UJA-Federation of New York	130 East 59th Street, #16101 New York, NY 10022-1397	501c(3)	General Operating Support	\$1,000.00
UJA-Federation of New York	130 East 59th Street, #16101 New York, NY 10022-1397	501c(3)	Project Support	\$2,000.00
UJA-Federation of New York	130 East 59th Street, #16101 New York, NY 10022-1397	501c(3)	General Operating Support	\$100.00
United Neighborhood Houses	70 West 36th Street, 5th Floor New York, NY 10018-8007	501c(3)	General Operating Support	\$500.00

Charity	Address	Payee Tax Statuses and Dates	Support Type	Amount
Washington University in St. Louis	Parents Annual Fund Campus Box 1192, One Brookings Drive Saint Louis, MO 63130-4899	501c(3)	General Operating Support	\$500.00
Wesleyan University	Wesleyan Annual Fund 318 High Street Middletown, CT 06459-0472	501c(3)	General Operating Support	\$4,000.00
West Coast Jewish Theatre	P.O. Box 1723 Studio City, CA 91614-0723	501c(3)	General Operating Support	\$1,000.00
West Coast Jewish Theatre	P.O. Box 1723 Studio City, CA 91614-0723	501c(3)	General Operating Support	\$1,500.00
West Harlem Environmental Action, Inc.	1854 Amsterdam Avenue, 2nd Floor New York, NY 10031-1714	501c(3)	General Operating Support	\$2,500.00
Westchester Reform Temple	255 Mamaroneck Road Scarsdale, NY 10583-7299	501c(3)	General Operating Support	\$3,550.00
Westchester Reform Temple	255 Mamaroneck Road Scarsdale, NY 10583-7299	501c(3)	General Operating Support	\$3,550.00
Winsor School	Pilgrim Road Boston, MA 02215	501c(3)	General Operating Support	\$500.00
Winsor School	Pilgrim Road Boston, MA 02215	501c(3)	General Operating Support	\$1,000.00
Women in Need, Inc.	115 West 31st Street New York, NY 10001	501c(3)	General Operating Support	\$3,500.00
World Wildlife Fund	1250 24th Street NW P.O. Box 96555 Washington, DC 20077-7789 www.worldwildlife.org	501c(3)	General Operating Support	\$500.00
Young Storytellers Foundation	923 East Third Street, Suite 307 Los Angeles, CA 90013	501c(3)	General Operating Support	\$200.00
Grand Totals (192 items)				\$828,386.00

**SCHEDULE D
(Form 1041)**

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

OMB No 1545-0092

2011

Name of estate or trust THE JOELSON FOUNDATION	Employer identification number 13-6220799
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Note: Form 5227 filers need to complete *only* Parts I and II

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	18,657.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2010 Capital Loss Carryover Worksheet	4	()
5 Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back ▶	5	18,657.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	177,237.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9 Capital gain distributions	9	
10 Gain from Form 4797, Part I	10	
11 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2010 Capital Loss Carryover Worksheet	11	()
12 Net long-term gain or (loss). Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back ▶	12	177,237.

For Paperwork Reduction Act Notice, see the instructions for Form 1041. Schedule D (Form 1041) 2011

Part III Summary of Parts I and II		(1) Beneficiaries' (see instr)	(2) Estate's or trust's	(3) Total
Caution: Read the instructions before completing this part.				
13	Net short-term gain or (loss)	13		18,657.
14	Net long-term gain or (loss):			
	a Total for year	14a		177,237.
	b Unrecaptured section 1250 gain (see line 18 of the wrksht)	14b		
	c 28% rate gain	14c		
15	Total net gain or (loss). Combine lines 13 and 14 ▶	15		195,894.

Note: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation

16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of a The loss on line 15, column (3) or b \$3,000	16	()
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Note: If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part only if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if

- Either line 14b, col (2) or line 14c, col (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero

Form 990-T trusts. Complete this part only if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)	17		
18	Enter the smaller of line 14a or 15 in column (2) but not less than zero	18		
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19		
20	Add lines 18 and 19	20		
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0- . . . ▶	21		
22	Subtract line 21 from line 20. If zero or less, enter -0-	22		
23	Subtract line 22 from line 17. If zero or less, enter -0-	23		
24	Enter the smaller of the amount on line 17 or \$2,300	24		
25	Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> Yes. Skip lines 25 and 26, go to line 27 and check the "No" box <input type="checkbox"/> No. Enter the amount from line 23	25		
26	Subtract line 25 from line 24	26		
27	Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> Yes. Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> No. Enter the smaller of line 17 or line 22	27		
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)	28		
29	Subtract line 28 from line 27	29		
30	Multiply line 29 by 15% (15)			30
31	Figure the tax on the amount on line 23. Use the 2011 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)			31
32	Add lines 30 and 31			32
33	Figure the tax on the amount on line 17. Use the 2011 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)			33
34	Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)			34

**SCHEDULE D-1
(Form 1041)**

**Continuation Sheet for Schedule D
(Form 1041)**

OMB No 1545-0092

2011

Department of the Treasury
Internal Revenue Service

▶ See instructions for Schedule D (Form 1041).
▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

Name of estate or trust: **THE JOELSON FOUNDATION** Employer identification number: **13-6220799**

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo., day, yr)	(c) Date sold (mo., day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a					
1344 SHS SLM CORP	10/05/2010	04/01/2011	20,721.	15,479.	5,242.
104 SHS SIEMENS A G SPONSORED	03/15/2011	04/01/2011	14,487.	12,498.	1,989.
27 SHS DEMAG CRANES AG	03/15/2011	05/02/2011	1,777.	1,258.	519.
.1 SHS CITIGROUP INC	03/01/2011	05/09/2011	4.	5.	-1.
295 SHS DEMAG CRANES AG	03/15/2011	06/16/2011	18,799.	13,744.	5,055.
900 SHS NALCO HLDG CO	04/27/2011	07/20/2011	32,232.	24,838.	7,394.
1080 SHS POSTNL N V	05/24/2011	06/09/2011	6,722.	27,666.	-20,944.
1080 SHS TNT EXPRESS NV	06/07/2011	08/09/2011	9,908.	15,001.	-5,093.
498 SHS HALCO HLDG	04/27/2011	08/09/2011	15,226.	13,744.	1,482.
356 SHS HALCO HLDG	06/20/2011	08/09/2011	10,884.	9,470.	1,414.
923 SHS INGERSOLL RAND PLC	07/21/2011	09/30/2011	24,991.	38,079.	-13,088.
219 SHS TE CONNECTIVITY LTD	12/01/2010	10/17/2011	7,476.	774.	6,702.
195 SHS HEINEKEN NV	12/17/2010	10/17/2011	9,056.	9,267.	-211.
194 SHS TARGET CORP	01/06/2011	10/17/2011	10,273.	10,582.	-309.
524 SHS TE CONNECTIVITY LTD	12/01/2010	10/27/2011	19,159.	1,853.	17,306.
277 SHS TARGET CORP	01/06/2011	10/27/2011	15,234.	15,110.	124.
177 SHS TE CONNECTIVITY LTD	12/01/2010	11/07/2011	6,120.	626.	5,494.
293 SHS TE CONNECTIVITY LTD	06/21/2011	11/07/2011	10,131.	10,228.	-97.
658 SHS THERMO FISHER SCIENTIFIC	09/22/2011	12/20/2011	29,316.	32,672.	-3,356.
383 SHS ITT CORP NEW	05/19/2011	12/21/2011	7,578.	8,391.	-813.
630 SHS KRAFT FOODS	01/20/2011	12/21/2011	23,378.	18,130.	5,248.
65 SHS GOOGLE	10/05/2011	01/04/2012	43,321.	31,738.	11,583.
151 SHS SIEMENS	03/15/2011	01/10/2012	14,559.	18,146.	-3,587.
1186 SHS TEREX CORP	07/25/2011	01/20/2012	21,950.	29,029.	-7,079.

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D-1 (Form 1041) 2011

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side

Employer identification number

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 150 SHS WELLPOINT INC	09/24/2009	04/01/2011	10,591.	7,613.	2,978.
278 SHS ORACLE CORP	01/15/2009	04/05/2011	9,529.	4,497.	5,032.
249 SHS ORACLE CORP	03/20/2009	04/05/2011	8,535.	4,266.	4,269.
1330 PEP BOYS MANNY MOE & JACK	11/02/2007	04/05/2011	18,023.	20,069.	-2,046.
4 SHS PEP BOYS MANNY MOE & JACK	08/13/2004	04/05/2011	54.	56.	-2.
250 SHS CSX	06/16/2009	04/19/2011	18,906.	8,789.	10,117.
53 SHS WELLPOINT INC	11/06/2003	04/21/2011	3,775.	1,803.	1,972.
92 SHS WELLPOINT	03/03/2009	04/21/2011	6,554.	2,906.	3,648.
121 SHS WELLPOINT	09/24/2009	04/21/2011	8,619.	6,141.	2,478.
57 SHS MASTERCARD INC	02/05/2010	04/26/2011	15,724.	12,528.	3,196.
238 SHS METHANEX CORP	01/29/2010	04/27/2011	7,854.	5,318.	2,536.
1318 SHS GOODYEAR TIRE & RUBBER	03/03/2008	04/29/2011	24,385.	36,876.	-12,491.
63 SHS DEMAG CRANES AG	11/28/2007	05/02/2011	4,146.	2,746.	1,400.
200 SHS DEMAG CRANES AG	12/05/2007	05/02/2011	13,162.	8,538.	4,624.
300 SHS DEMAG CRANES AG	12/06/2007	05/02/2011	19,744.	13,008.	6,736.
10 SHS ORACLE CORP	10/24/2008	05/02/2011	361.	160.	201.
304 SHS ORACLE CORP	01/15/2009	05/02/2011	10,980.	4,918.	6,062.
265 SHS COVIDIEN PLC	05/28/2009	05/18/2011	15,097.	3,085.	12,012.
529 SHS METHANEX CORP	09/08/2005	05/18/2011	16,191.	7,937.	8,254.
393 SHS CVS CAREMARK	01/12/2009	05/19/2011	15,074.	9,884.	5,190.
146 SHS WELLPOINT	03/03/2009	05/19/2011	11,921.	4,612.	7,309.
300 SHS METHANEX CORP	09/08/2005	05/31/2011	9,508.	4,501.	5,007.
329 SHS METHANEX CORP	01/29/2010	05/31/2011	10,427.	7,351.	3,076.
181 SHS COCA COLA	05/27/2010	06/17/2011	5,159.	3,984.	1,175.
895 SHS COCA COLA	06/01/2010	06/17/2011	25,509.	19,699.	5,810.

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b

Schedule D-1 (Form 1041) 2011

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side

Employer identification number

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo., day, yr)	(c) Date sold (mo., day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 31 SHS MASTERCARD	07/01/2009	06/29/2011	9,219.	5,200.	4,019.
17 SHS MASTERCARD	02/05/2010	06/29/2011	5,056.	3,736.	1,320.
266 SHS TELEFLEX	02/21/2008	07/27/2011	16,775.	15,962.	813.
63 SHS MASTERCARD	07/01/2009	08/03/2011	21,362.	10,568.	10,794.
439 SHS MOLSON COORS BREWING CO	02/18/2010	10/12/2011	18,405.	17,840.	565.
196 SHS KRAFT FOODS	01/20/2010	10/17/2011	6,907.	5,641.	1,266.
67 SHS DIAGEO PLC	10/24/2008	10/19/2011	5,596.	3,613.	1,983.
142 SHS DIAGEO PLC	03/20/2009	10/19/2011	11,861.	5,952.	5,909.
399 SHS CVS CAREMARK	01/12/2009	11/08/2011	15,557.	10,035.	5,522.
135 SHS CANADIAN TIRE LTD	12/15/2006	11/16/2011	8,367.	8,670.	-303.
65 SHS CANADIAN TIRE LTD	02/01/2007	11/16/2011	4,029.	3,806.	223.
145 SHS CANADIAN TIRE LTD	02/01/2007	12/01/2011	9,190.	8,491.	699.
40 SHS CANADIAN TIRE LTD	12/03/2009	12/01/2011	2,535.	2,058.	477.
370 SHS CVS CAREMARK	01/12/2009	01/03/2012	15,398.	9,305.	6,093.
49 SHS CVS CAREMARK	06/10/2009	01/03/2012	2,039.	1,498.	541.
195 SHS DIAGEO PLC	03/20/2009	01/04/2012	17,197.	8,173.	9,024.
297 SHS KRAFT FOODS	01/20/2010	01/05/2012	11,213.	8,547.	2,666.
619 SHS KRAFT FOODS	05/26/2010	01/05/2012	23,371.	17,837.	5,534.
125 SHS TELEFLEX	02/21/2008	01/12/2012	7,631.	7,501.	130.
60 SHS TELEFLEX	10/10/2008	01/12/2012	3,663.	2,806.	857.
421 SHS PEP BOYS MANNY MOE & JACK	08/13/2004	01/19/2012	4,743.	5,917.	-1,174.
500 SHS HEINEKEN	12/17/2010	01/20/2012	23,300.	23,762.	-462.
45 SHS HEINEKEN	12/17/2010	01/23/2012	2,098.	2,139.	-41.
110 SHS COVIDIEN	05/28/2009	01/26/2012	5,713.	1,281.	4,432.
260 SHS PEP BOYS MANNY MOE & JACK	08/13/2004	01/30/2012	3,870.	3,654.	216.

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b

Schedule D-1 (Form 1041) 2011

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P r o p e r t y	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
20,721.		1344 SHS SLM CORP PROPERTY TYPE: SECURITIES 15,479.				P	10/05/2010	04/01/2011
							5,242.	
14,487.		104 SHS SIEMENS A G SPONSORED PROPERTY TYPE: SECURITIES 12,498.				P	03/15/2011	04/01/2011
							1,989.	
1,777.		27 SHS DEMAG CRANES AG PROPERTY TYPE: SECURITIES 1,258.				P	03/15/2011	05/02/2011
							519.	
4.		.1 SHS CITIGROUP INC PROPERTY TYPE: SECURITIES 5.				P	03/01/2011	05/09/2011
							-1.	
18,799.		295 SHS DEMAG CRANES AG PROPERTY TYPE: SECURITIES 13,744.				P	03/15/2011	06/16/2011
							5,055.	
32,232.		900 SHS NALCO HLDG CO PROPERTY TYPE: SECURITIES 24,838.				P	04/27/2011	07/20/2011
							7,394.	
6,722.		1080 SHS POSTNL N V PROPERTY TYPE: SECURITIES 27,666.				P	05/24/2011	06/09/2011
							-20,944.	
9,908.		1080 SHS TNT EXPRESS NV PROPERTY TYPE: SECURITIES 15,001.				P	06/07/2011	08/09/2011
							-5,093.	
15,226.		498 SHS HALCO HLDG PROPERTY TYPE: SECURITIES 13,744.				P	04/27/2011	08/09/2011
							1,482.	
10,884.		356 SHS HALCO HLDG PROPERTY TYPE: SECURITIES 9,470.				P	06/20/2011	08/09/2011
							1,414.	
24,991.		923 SHS INGERSOLL RAND PLC PROPERTY TYPE: SECURITIES 38,079.				P	07/21/2011	09/30/2011
							-13,088.	
7,476.		219 SHS TE CONNECTIVITY LTD PROPERTY TYPE: SECURITIES 774.				P	12/01/2010	10/17/2011
							6,702.	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
9,056.		195 SHS HEINEKEN NV PROPERTY TYPE: SECURITIES 9,267.				P	12/17/2010	10/17/2011 -211.
10,273.		194 SHS TARGET CORP PROPERTY TYPE: SECURITIES 10,582.				P	01/06/2011	10/17/2011 -309.
19,159.		524 SHS TE CONNECTIVITY LTD PROPERTY TYPE: SECURITIES 1,853.				P	12/01/2010	10/27/2011 17,306.
15,234.		277 SHS TARGET CORP PROPERTY TYPE: SECURITIES 15,110.				P	01/06/2011	10/27/2011 124.
6,120.		177 SHS TE CONNECTIVITY LTD PROPERTY TYPE: SECURITIES 626.				P	12/01/2010	11/07/2011 5,494.
10,131.		293 SHS TE CONNECTIVITY LTD PROPERTY TYPE: SECURITIES 10,228.				P	06/21/2011	11/07/2011 -97.
29,316.		658 SHS THERMO FISHER SCIENTIFIC PROPERTY TYPE: SECURITIES 32,672.				P	09/22/2011	12/20/2011 -3,356.
7,578.		383 SHS ITT CORP NEW PROPERTY TYPE: SECURITIES 8,391.				P	05/19/2011	12/21/2011 -813.
10,591.		150 SHS WELLPOINT INC PROPERTY TYPE: SECURITIES 7,613.				P	09/24/2009	04/01/2011 2,978.
9,529.		278 SHS ORACLE CORP PROPERTY TYPE: SECURITIES 4,497.				P	01/15/2009	04/05/2011 5,032.
8,535.		249 SHS ORACLE CORP PROPERTY TYPE: SECURITIES 4,266.				P	03/20/2009	04/05/2011 4,269.
18,023.		1330 PEP BOYS MANNY MOE & JACK PROPERTY TYPE: SECURITIES 20,069.				P	11/02/2007	04/05/2011 -2,046.

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P r o p e r t y T y p e	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
54.		4 SHS PEP BOYS MANNY MOE & JACK PROPERTY TYPE: SECURITIES 56.				P	08/13/2004	04/05/2011 -2.
18,906.		250 SHS CSX PROPERTY TYPE: SECURITIES 8,789.				P	06/16/2009	04/19/2011 10,117.
3,775.		53 SHS WELLPOINT INC PROPERTY TYPE: SECURITIES 1,803.				P	11/06/2003	04/21/2011 1,972.
6,554.		92 SHS WELLPOINT PROPERTY TYPE: SECURITIES 2,906.				P	03/03/2009	04/21/2011 3,648.
8,619.		121 SHS WELLPOINT PROPERTY TYPE: SECURITIES 6,141.				P	09/24/2009	04/21/2011 2,478.
15,724.		57 SHS MASTERCARD INC PROPERTY TYPE: SECURITIES 12,528.				P	02/05/2010	04/26/2011 3,196.
7,854.		238 SHS METHANEX CORP PROPERTY TYPE: SECURITIES 5,318.				P	01/29/2010	04/27/2011 2,536.
24,385.		1318 SHS GOODYEAR TIRE & RUBBER PROPERTY TYPE: SECURITIES 36,876.				P	03/03/2008	04/29/2011 -12,491.
4,146.		63 SHS DEMAG CRANES AG PROPERTY TYPE: SECURITIES 2,746.				P	11/28/2007	05/02/2011 1,400.
13,162.		200 SHS DEMAG CRANES AG PROPERTY TYPE: SECURITIES 8,538.				P	12/05/2007	05/02/2011 4,624.
19,744.		300 SHS DEMAG CRANES AG PROPERTY TYPE: SECURITIES 13,008.				P	12/06/2007	05/02/2011 6,736.
361.		10 SHS ORACLE CORP PROPERTY TYPE: SECURITIES 160.				P	10/24/2008	05/02/2011 201.

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
10,980.		304 SHS ORACLE CORP PROPERTY TYPE: SECURITIES 4,918.				P	01/15/2009	05/02/2011 6,062.
15,097.		265 SHS COVIDIEN PLC PROPERTY TYPE: SECURITIES 3,085.				P	05/28/2009	05/18/2011 12,012.
16,191.		529 SHS METHANEX CORP PROPERTY TYPE: SECURITIES 7,937.				P	09/08/2005	05/18/2011 8,254.
15,074.		393 SHS CVS CAREMARK PROPERTY TYPE: SECURITIES 9,884.				P	01/12/2009	05/19/2011 5,190.
11,921.		146 SHS WELLPOINT PROPERTY TYPE: SECURITIES 4,612.				P	03/03/2009	05/19/2011 7,309.
9,508.		300 SHS METHANEX CORP PROPERTY TYPE: SECURITIES 4,501.				P	09/08/2005	05/31/2011 5,007.
10,427.		329 SHS METHANEX CORP PROPERTY TYPE: SECURITIES 7,351.				P	01/29/2010	05/31/2011 3,076.
5,159.		181 SHS COCA COLA PROPERTY TYPE: SECURITIES 3,984.				P	05/27/2010	06/17/2011 1,175.
25,509.		895 SHS COCA COLA PROPERTY TYPE: SECURITIES 19,699.				P	06/01/2010	06/17/2011 5,810.
9,219.		31 SHS MASTERCARD PROPERTY TYPE: SECURITIES 5,200.				P	07/01/2009	06/29/2011 4,019.
5,056.		17 SHS MASTERCARD PROPERTY TYPE: SECURITIES 3,736.				P	02/05/2010	06/29/2011 1,320.
16,775.		266 SHS TELEFLEX PROPERTY TYPE: SECURITIES 15,962.				P	02/21/2008	07/27/2011 813.

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P r o p e r t y	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
21,362.		63 SHS MASTERCARD PROPERTY TYPE: SECURITIES 10,568.				P	07/01/2009	08/03/2011 10,794.
18,405.		439 SHS MOLSON COORS BREWING CO PROPERTY TYPE: SECURITIES 17,840.				P	02/18/2010	10/12/2011 565.
6,907.		196 SHS KRAFT FOODS PROPERTY TYPE: SECURITIES 5,641.				P	01/20/2010	10/17/2011 1,266.
5,596.		67 SHS DIAGEO PLC PROPERTY TYPE: SECURITIES 3,613.				P	10/24/2008	10/19/2011 1,983.
11,861.		142 SHS DIAGEO PLC PROPERTY TYPE: SECURITIES 5,952.				P	03/20/2009	10/19/2011 5,909.
15,557.		399 SHS CVS CAREMARK PROPERTY TYPE: SECURITIES 10,035.				P	01/12/2009	11/08/2011 5,522.
8,367.		135 SHS CANADIAN TIRE LTD PROPERTY TYPE: SECURITIES 8,670.				P	12/15/2006	11/16/2011 -303.
4,029.		65 SHS CANADIAN TIRE LTD PROPERTY TYPE: SECURITIES 3,806.				P	02/01/2007	11/16/2011 223.
9,190.		145 SHS CANADIAN TIRE LTD PROPERTY TYPE: SECURITIES 8,491.				P	02/01/2007	12/01/2011 699.
2,535.		40 SHS CANADIAN TIRE LTD PROPERTY TYPE: SECURITIES 2,058.				P	12/03/2009	12/01/2011 477.
23,378.		630 SHS KRAFT FOODS PROPERTY TYPE: SECURITIES 18,130.				P	01/20/2011	12/21/2011 5,248.
43,321.		65 SHS GOOGLE PROPERTY TYPE: SECURITIES 31,738.				P	10/05/2011	01/04/2012 11,583.

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
14,559.		151 SHS SIEMENS PROPERTY TYPE: SECURITIES 18,146.				P	03/15/2011	01/10/2012
							-3,587.	
21,950.		1186 SHS TEREX CORP PROPERTY TYPE: SECURITIES 29,029.				P	07/25/2011	01/20/2012
							-7,079.	
20,257.		766 SHS XYLEM INC PROPERTY TYPE: SECURITIES 25,242.				P	05/19/2011	01/20/2012
							-4,985.	
18,744.		402 SHS HEINEKEN PROPERTY TYPE: SECURITIES 20,004.				P	02/15/2011	01/23/2012
							-1,260.	
5,269.		354 SHS PEP BOYS MANNY MOE & JACK PROPERTY TYPE: SECURITIES 3,954.				P	03/16/2011	01/30/2012
							1,315.	
4,019.		270 SHS PEP BOYS MANNY MOE & JACK PROPERTY TYPE: SECURITIES 3,673.				P	05/16/2011	01/30/2012
							346.	
7,691.		766 SHS EXELIS INC PROPERTY TYPE: SECURITIES 10,183.				P	1	02/09/2012
							-2,492.	
7,245.		766 CITIGROUP PROPERTY TYPE: SECURITIES 10,139.				P	03/01/2011	02/21/2012
							-2,894.	
8,076.		231 SHS EBAY PROPERTY TYPE: SECURITIES 7,311.				P	05/23/2011	02/21/2012
							765.	
12,988.		361 SHS EBAY PROPERTY TYPE: SECURITIES 11,426.				P	05/23/2011	02/23/2012
							1,562.	
11,961.		326 SHS EBAY PROPERTY TYPE: SECURITIES 10,318.				P	05/23/2011	03/13/2012
							1,643.	
7,265.		198 SHS EBAY PROPERTY TYPE: SECURITIES 5,699.				P	06/20/2011	03/13/2012
							1,566.	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
6,622.		178 SHS EBAY PROPERTY TYPE: SECURITIES 5,123.				P	06/20/2011	03/14/2012 1,499.
16,853.		453 SHS EBAY PROPERTY TYPE: SECURITIES 13,586.				P	01/04/2012	03/14/2012 3,267.
15,398.		370 SHS CVS CAREMARK PROPERTY TYPE: SECURITIES 9,305.				P	01/12/2009	01/03/2012 6,093.
2,039.		49 SHS CVS CAREMARK PROPERTY TYPE: SECURITIES 1,498.				P	06/10/2009	01/03/2012 541.
17,197.		195 SHS DIAGEO PLC PROPERTY TYPE: SECURITIES 8,173.				P	03/20/2009	01/04/2012 9,024.
11,213.		297 SHS KRAFT FOODS PROPERTY TYPE: SECURITIES 8,547.				P	01/20/2010	01/05/2012 2,666.
23,371.		619 SHS KRAFT FOODS PROPERTY TYPE: SECURITIES 17,837.				P	05/26/2010	01/05/2012 5,534.
7,631.		125 SHS TELEFLEX PROPERTY TYPE: SECURITIES 7,501.				P	02/21/2008	01/12/2012 130.
3,663.		60 SHS TELEFLEX PROPERTY TYPE: SECURITIES 2,806.				P	10/10/2008	01/12/2012 857.
4,743.		421 SHS PEP BOYS MANNY MOE & JACK PROPERTY TYPE: SECURITIES 5,917.				P	08/13/2004	01/19/2012 -1,174.
23,300.		500 SHS HEINEKEN PROPERTY TYPE: SECURITIES 23,762.				P	12/17/2010	01/20/2012 -462.
2,098.		45 SHS HEINEKEN PROPERTY TYPE: SECURITIES 2,139.				P	12/17/2010	01/23/2012 -41.

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P r o p e r t y D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
5,713.		110 SHS COVIDIEN PROPERTY TYPE: SECURITIES 1,281.				P	05/28/2009	01/26/2012
					4,432.			
3,870.		260 SHS PEP BOYS MANNY MOE & JACK PROPERTY TYPE: SECURITIES 3,654.				P	08/13/2004	01/30/2012
					216.			
18,473.		1241 SHS PEP BOYS MANNY MOE & JACK PROPERTY TYPE: SECURITIES 8,638.				P	05/08/2009	01/30/2012
					9,835.			
10,420.		700 SHS PEP BOYS MANNY MOE & JACK PROPERTY TYPE: SECURITIES 8,917.				P	03/15/2011	01/30/2012
					1,503.			
9,378.		630 SHS PEP BOYS MANNY MOE & JACK PROPERTY TYPE: SECURITIES 8,007.				P	03/16/2011	01/30/2012
					1,371.			
60.		4 SHS PEP BOYS MANNY MOE & JACK PROPERTY TYPE: SECURITIES 47.				P	03/16/2011	01/30/2012
					13.			
6,760.		236 SHS ORACLE CORP PROPERTY TYPE: SECURITIES 3,773.				P	10/24/2008	02/21/2012
					2,987.			
9,898.		219 SHS CVS CAREMARK CORP PROPERTY TYPE: SECURITIES 6,696.				P	06/10/2009	02/29/2012
					3,202.			
4,158.		92 SHS CVS CAREMARK PROPERTY TYPE: SECURITIES 2,727.				P	02/29/2012	06/30/2010
					1,431.			
7,633.		222 SHS CITIGROUP PROPERTY TYPE: SECURITIES 10,278.				P	03/01/2011	03/02/2012
					-2,645.			
12,145.		300 SHS JP MORGAN CHASE PROPERTY TYPE: SECURITIES 12,653.				P	09/26/2008	03/02/2012
					-508.			
10,406.		184 SHS TARGET PROPERTY TYPE: SECURITIES 10,037.				P	01/06/2011	03/02/2012
					369.			

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
1,584.		28 SHS TARGET PROPERTY TYPE: SECURITIES 1,509.				P	02/14/2011	03/02/2012 75.
13,700.		234 SHS TARGET PROPERTY TYPE: SECURITIES 12,607.				P	02/14/2011	03/16/2012 1,093.
5,536.		187 SHS ORACLE PROPERTY TYPE: SECURITIES 2,989.				P	10/24/2008	03/20/2012 2,547.
4,707.		159 SHS ORACLE PROPERTY TYPE: SECURITIES 3,440.				P	06/08/2010	03/20/2012 1,267.
8,075.		111 SHS WELLPOINT PROPERTY TYPE: SECURITIES 3,506.				P	03/03/2009	03/30/2012 4,569.
3,201.		44 SHS WELLPOINT PROPERTY TYPE: SECURITIES 2,552.				P	11/08/2010	03/30/2012 649.
487.		INVESCO VENTURE PARTNERSHIP - ST GAIN PROPERTY TYPE: OTHER				P	VARIOUS	VARIOUS 487.
		INVESCO VENTURE PARTNERSHIP - LT LOSS PROPERTY TYPE: OTHER 31,121.				P	VARIOUS	VARIOUS -31,121.
97,403.		INVESCO VENTURE PARTNERSHIP - RETURN OF 97,403.					VARIOUS	VARIOUS
		INVESCO NON-US PARTNERSHIP - LT LOSS PROPERTY TYPE: OTHER 34,478.				P	VARIOUS	VARIOUS -34,478.
8,293.		INVESCO NON-US PARTNERSHIP - RETURN OF C PROPERTY TYPE: OTHER 8,293.				P	VARIOUS	VARIOUS
		CHANCELLOR PARTNERSHIP - ST LOSS PROPERTY TYPE: OTHER 23.				P	VARIOUS	VARIOUS -23.

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
68,319.		CHANCELLOR PARTNERSHIP - LT GAIN PROPERTY TYPE: OTHER				P	VARIOUS	VARIOUS
						68,319.		
158,125.		CHANCELLOR PARTNERSHIP - RETURN OF CAPIT PROPERTY TYPE: OTHER 158,125.				P	VARIOUS	VARIOUS
131,066.		AHAB REDEMPTION FUND LTD - RETURN OF CAP PROPERTY TYPE: SECURITIES 131,066.				P	VARIOUS	01/23/2012
TOTAL GAIN(LOSS)							<u>195,894.</u>	

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box **X**
- Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Type or print <small>File by the due date for filing your return. See instructions.</small>	Name of exempt organization or other filer, see instructions.		Enter filer's identifying number, see instructions	
	THE JOELSON FOUNDATION		<input checked="" type="checkbox"/> X	Employer identification number (EIN) or 13-6220799
	Number, street, and room or suite no. If a P.O. box, see instructions.		<input type="checkbox"/>	Social security number (SSN)
C/O WITHUMSMITH+BROWN, P.C. ATTN: DON SCHEIER				
City, town or post office, state, and ZIP code. For a foreign address, see instructions				
PRINCETON, NJ 08540-6313				

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

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

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

- The books are in the care of BARBARA J FIFE
 Telephone No. 212 246-0230 FAX No. 212 246-9114
- 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.

- I request an additional 3-month extension of time until 02/15, 20 13 .
- For calendar year , or other tax year beginning 04/01, 20 11, and ending 03/31, 20 12
- If the tax year entered in line 5 is for less than 12 months, check reason: Initial return Final return Change in accounting period
- State in detail why you need the extension INFORMATION NECESSARY TO PREPARE AND FILE A COMPLETE AND ACCURATE RETURN IS NOT YET AVAILABLE. THE FOUNDATION'S BOOKS AND RECORDS ARE LOCATED IN THE IRS HURRICANE SANDY DISASTER AREA.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a \$	5,000.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b \$	11,987.
c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c \$	

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature Title Date