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

2011

Department of the Treasury
Internal Revenue Service

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

For calendar year 2011 or tax year beginning APR 1, 2011, and ending MAR 31, 2012

Name of foundation

A Employer identification number

THE LOIS & IRVING BLUM FOUNDATION, INC.

52-6057035

Number and street (or P.O. box number if mail is not delivered to street address)

Room/suite

B Telephone number

233 EAST REDWOOD STREET

100

410-356-5900

City or town, state, and ZIP code

C If exemption application is pending, check here ☐

BALTIMORE, MD 21202

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 1. Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end of year

J Accounting method: ☒ Cash ☐ AccrualF If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

(from Part II, col (c), line 16)

☐ Other (specify)

\$ 16,367,571. (Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		93,445.		N/A	
2 Check ☐ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		376,941.	376,941.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		-19,215.			
b Gross sales price for all assets on line 6a		2,288,592.			
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		1,969.	1,169.		STATEMENT 2
12 Total. Add lines 1 through 11		453,140.	378,110.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 3		8,604.	8,604.		0.
b Accounting fees STMT 4		7,716.	7,716.		0.
c Other professional fees					
17 Interest					
18 Taxes STMT 5		7,431.	7,431.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		67,751.	67,704.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		91,502.	91,455.		0.
25 Contributions, gifts, grants paid		1,022,695.			1,022,695.
26 Total expenses and disbursements. Add lines 24 and 25		1,114,197.	91,455.		1,022,695.
27 Subtract line 26 from line 12		-661,057.			
a Excess of revenue over expenses and disbursements			286,655.		
b Net investment income (if negative enter -0-)					
c Adjusted net income (if negative enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash - non-interest-bearing		948,327.	312,361.	312,361.
	2	Savings and temporary cash investments				
	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				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges			-93,090.	-93,090.
	10a	Investments - U.S. and state government obligations STMT 7	2,803,031.	2,605,898.	2,750,567.	
	b	Investments - corporate stock STMT 8	6,615,207.	6,598,939.	9,485,388.	
	c	Investments - corporate bonds STMT 9	2,477,712.	2,754,248.	2,913,905.	
11	Investments - land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 10	58,218.	63,582.	998,440.		
14	Land, buildings, and equipment: basis ▶					
	Less accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers)			12,902,495.	12,241,938.	16,367,571.
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				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)			0.	0.
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31					
	24	Unrestricted	12,902,495.	12,241,938.		
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances	12,902,495.	12,241,938.		
	31	Total liabilities and net assets/fund balances	12,902,495.	12,241,938.		

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	12,902,495.
2	Enter amount from Part I, line 27a	2	-661,057.
3	Other increases not included in line 2 (itemize) ▶ PRIOR YEAR ADJUSTMENT	3	500.
4	Add lines 1, 2, and 3	4	12,241,938.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	12,241,938.

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 LEGG MASON		P	VARIOUS	VARIOUS
b LEGG MASON		P	VARIOUS	VARIOUS
c CAPITAL GAINS DIVIDENDS				
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 55,031.		55,616.	-585.
b 2,202,733.		2,252,191.	-49,458.
c 30,828.			30,828.
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			-585.
b			-49,458.
c			30,828.
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	-19,215.
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). If (loss), enter -0- in Part I, line 8	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		3	N/A

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 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	968,485.	16,217,656.	.059718
2009	685,665.	14,538,025.	.047164
2008	696,890.	15,177,942.	.045915
2007	712,467.	16,083,651.	.044298
2006	993,756.	16,342,606.	.060808

2 Total of line 1, column (d)	2	.257903
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	.051581
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	13,926,685.
5 Multiply line 4 by line 3	5	718,352.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,867.
7 Add lines 5 and 6	7	721,219.
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	1,022,695.

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 ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)	1	2,867.
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	2	0.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).	3	2,867.
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
3	Add lines 1 and 2	5	2,867.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		
6	Credits/Payments:		
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a	5,020.
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	5,020.
8	Enter any penalty for underpayment of estimated tax. Check here ☐ 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	2,153.
11	Enter the amount of line 10 to be: Credited to 2012 estimated tax ☒ 2,153. Refunded ☐	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ MD		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>LOIS & IRVING BLUM FOUNDATION</u> Telephone no. ► <u>410-356-5900</u> Located at ► <u>233 EAST REDWOOD STREET, BALTIMORE, MD</u> ZIP+4 ► <u>21202</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 <u>N/A</u>			
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here <u>N/A</u> ☐	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	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 ☒ 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.) <u>N/A</u>	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 ☒ 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.) <u>N/A</u>	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)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

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

6b

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

(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
LOIS B. FEINBLATT	PRESIDENT			
233 EAST REDWOOD STREET, #100				
BALTIMORE, MD 21202	20.00	0.	0.	0.
LAWRENCE A. BLUM	VICE PRESIDENT			
233 EAST REDWOOD STREET, #100				
BALTIMORE, MD 21202	1.00	0.	0.	0.
CAROLYN P. BLUM	SECRETARY			
233 EAST REDWOOD STREET, #100				
BALTIMORE, MD 21202	1.00	0.	0.	0.
JEFFERY D. BLUM	TRESURER			
233 EAST REDWOOD STREET, #100				
BALTIMORE, MD 21202	1.00	0.	0.	0.

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

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

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

0

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

Form 990-PF (2011)

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	13,344,051.
b	Average of monthly cash balances	1b	794,715.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	14,138,766.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	14,138,766.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	212,081.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	13,926,685.
6	Minimum investment return. Enter 5% of line 5	6	696,334.

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	696,334.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	2,867.
b	Income tax for 2011. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,867.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	693,467.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	693,467.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	693,467.

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	1,022,695.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,022,695.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,867.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,019,828.

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				693,467.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			35,410.	
b Total for prior years:		0.		
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	0.			
4 Qualifying distributions for 2011 from Part XII, line 4: ► \$ 1,022,695.				
a Applied to 2010, but not more than line 2a			35,410.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2011 distributable amount				693,467.
e Remaining amount distributed out of corpus	293,818.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	293,818.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
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		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2010. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2011. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2012				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2012 Subtract lines 7 and 8 from line 6a	293,818.			
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	293,818.			

N/A

☐ 4942(j)(3) or ☐ 4942(j)(5)

(4) Gross investment income

[illegible]

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.)
----------------	--

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))

LOIS B. FEINBLATT

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

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
a <i>Paid during the year</i>				
SEE ATTACHED SCHEDULE				1,022,695.
Total			▶ 3a	1,022,695.
b <i>Approved for future payment</i>				
NONE				
Total			▶ 3b	0.

Enter gross amounts unless otherwise indicated.

(See worksheet in line 13 instructions to verify calculations.)

[illegible]

Part XVII

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

- | | | Yes | No |
|--|---|-------|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| | a Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| | b Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| (6) Performance of services or membership or fundraising solicitations | 1b(6) | X | |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X | |
| d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

Under penalties of perjury I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.



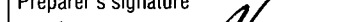
Signature of officer or trustee

Date _____

- Title

May the IRS discuss this return with the preparer shown below (see instr)?

☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name BARRY B. BONDROFF, CPA	Preparer's signature 	Date 8/30/12	Check ☐ if self-employed	PTIN P00087387
	Firm's name ▶ GORFINE, SCHILLER & GARDYN, PA			Firm's EIN ▶ 52-1231901	
	Firm's address ▶ 10045 RED RUN BLVD, SUITE 250 OWINGS MILLS, MD 21117			Phone no. 410-356-5900	

Form **990-PF** (2011)

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

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

OMB No 1545-0047

2011

Name of the organization

Employer identification number

THE LOIS & IRVING BLUM FOUNDATION, INC.

52-6057035

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck 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).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2011)

Name of organization

Employer identification number

THE LOIS & IRVING BLUM FOUNDATION, INC.**52-6057035****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	THE IRVING BLUM TRUST 3908 N. CHARLES STREET, APT 503 BALTIMORE, MD 21218	\$ 93,445.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Employer identification number

52-6057035

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

[illegible]

Name of organization	Employer identification number
THE LOIS & IRVING BLUM FOUNDATION, INC.	52-6057035

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) ▶ \$

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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DAVIS NEW YORK VENTURE FUND	5,364.	0.	5,364.
LEGG MASON INVESTMENTS	398,218.	26,641.	371,577.
LEGG MASON INVESTMENTS	4,187.	4,187.	0.
TOTAL TO FM 990-PF, PART I, LN 4	407,769.	30,828.	376,941.

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PROCEEDS RECEIVED - CLASS ACTION	136.	136.	
NONDIVIDEND DISTRIBUTION - RETURN OF CAPITAL	800.	0.	
MISCELLANEOUS	1,033.	1,033.	
TOTAL TO FORM 990-PF, PART I, LINE 11	1,969.	1,169.	

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	8,604.	8,604.		0.
TO FM 990-PF, PG 1, LN 16A	8,604.	8,604.		0.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING FEES	7,716.	7,716.		0.	
TO FORM 990-PF, PG 1, LN 16B	7,716.	7,716.		0.	

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES	7,431.	7,431.		0.	
EXCISE TAX	0.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	7,431.	7,431.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT MANAGEMENT FEES	67,658.	67,658.		0.	
MISCELLANEOUS	93.	46.		0.	
TO FORM 990-PF, PG 1, LN 23	67,751.	67,704.		0.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	7
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
LEGG MASON	X		2,605,898.	2,750,567.
TOTAL U.S. GOVERNMENT OBLIGATIONS			2,605,898.	2,750,567.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			2,605,898.	2,750,567.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
LEGG MASON	6,598,939.	9,485,388.
TOTAL TO FORM 990-PF, PART II, LINE 10B	6,598,939.	9,485,388.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
LEGG MASON	2,754,248.	2,913,905.
TOTAL TO FORM 990-PF, PART II, LINE 10C	2,754,248.	2,913,905.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
DAVIS MUTUAL FUNDS	COST	63,582.	998,440.
TOTAL TO FORM 990-PF, PART II, LINE 13		63,582.	998,440.

The Lois and Irving Blum Foundation, Inc
Schedule of Grants Paid
Form 990-PF / EIN #52-6057035
March 31, 2012

Recipient	Amount	Relationship	Purpose	Foundation	
				Status	
888 Women's History Project	\$ 1,000	None	Charitable	501(c)(3)	
ABAG	3,500	None	Charitable	501(c)(3)	
Adoption of Jewish Identity Project	5,000	None	Charitable	501(c)(3)	
Advocates for Children & Youth	1,500	None	Charitable	501(c)(3)	
Alzheimers Association Greater Maryland Chapter	300	None	Charitable	501(c)(3)	
Amaranthine Museum	500	None	Charitable	501(c)(3)	
American Cancer Society	100	None	Charitable	501(c)(3)	
American Civil Liberties Union	2,000	None	Charitable	501(c)(3)	
American Diabetes Association	1,110	None	Charitable	501(c)(3)	
American Heart Association	100	None	Charitable	501(c)(3)	
American Lung Association	100	None	Charitable	501(c)(3)	
American Visionary Arts Museum	30,000	None	Charitable	501(c)(3)	
Art With A Heart	100	None	Charitable	501(c)(3)	
Arts Education in Maryland Schools	1,500	None	Charitable	501(c)(3)	
Auxiliary Women's Board of John Hopkins Hospital	50	None	Charitable	501(c)(3)	
Baltimore Architecture Foundation - Walter Shawn	500	None	Charitable	501(c)(3)	
Baltimore Clayworks Education Center	2,000	None	Charitable	501(c)(3)	
Baltimore Community Foundation - Gil Sandler Fund	1,000	None	Charitable	501(c)(3)	
Baltimore Leadership School for Young Women	5,000	None	Charitable	501(c)(3)	
Baltimore Museum of Art	10,000	None	Charitable	501(c)(3)	
Baltimore School for the Arts - Alice Abrams Scholarship	2,000	None	Charitable	501(c)(3)	
Beth Am Synagogue	12,000	None	Charitable	501(c)(3)	
BLEWS Black Jewish Forum of Balto , Inc	2,500	None	Charitable	501(c)(3)	
B'more Club Houses, Inc	5,000	None	Charitable	501(c)(3)	
CASA of Baltimore, Inc	1,500	None	Charitable	501(c)(3)	
Center for Constitutional Rights	10,000	None	Charitable	501(c)(3)	
Center for Court Innovation	500	None	Charitable	501(c)(3)	
Center for Jewish Economic Development	15,000	None	Charitable	501(c)(3)	
Center for Justice & Accountability	57,500	None	Charitable	501(c)(3)	
Center Stage	2,500	None	Charitable	501(c)(3)	
Central Scholarship Bureau	5,000	None	Charitable	501(c)(3)	
CHANA	1,000	None	Charitable	501(c)(3)	
Chesapeake Center for Youth Development	10,000	None	Charitable	501(c)(3)	
Children's Guild	1,000	None	Charitable	501(c)(3)	
City & County School	1,000	None	Charitable	501(c)(3)	
Community Law Center	5,000	None	Charitable	501(c)(3)	
Compassion & Caring	250	None	Charitable	501(c)(3)	
Creative Alliance	1,000	None	Charitable	501(c)(3)	
Crohn's & Colitis Foundation	500	None	Charitable	501(c)(3)	
Death With Dignity National Center	500	None	Charitable	501(c)(3)	
Doctors without Borders	2,500	None	Charitable	501(c)(3)	
Dr Bob's Place Respite Care for Kids	1,000	None	Charitable	501(c)(3)	
Edward Myerberg Senior Center	1,000	None	Charitable	501(c)(3)	
Emma Goldman Papers Project	25,000	None	Charitable	501(c)(3)	
Enoch Pratt Free Library	2,560	None	Charitable	501(c)(3)	
Enterprise Community Partners, Inc	1,000	None	Charitable	501(c)(3)	
Everyman Theater	5,000	None	Charitable	501(c)(3)	
Facing History & Ourselves National Foundation	1,500	None	Charitable	501(c)(3)	
Film - Art International	5,000	None	Charitable	501(c)(3)	
Free State Legal Project	5,000	None	Charitable	501(c)(3)	
Freedom Academy Foundation	15,000	None	Charitable	501(c)(3)	
Fuel Fund of Maryland	10,000	None	Charitable	501(c)(3)	
Goucher Hillel	100	None	Charitable	501(c)(3)	
Habitat for Humanity	250	None	Charitable	501(c)(3)	
Harford Belair Community Mental Health Center, Inc	1,000	None	Charitable	501(c)(3)	

(continued)

The Lois and Irving Blum Foundation, Inc
Schedule of Grants Paid
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Hearing and Speech Agency	300	None	Charitable	501(c)(3)
Hebrew Immigrant Aid Society	1,000	None	Charitable	501(c)(3)
Hood College	500	None	Charitable	501(c)(3)
Hopewell Cancer Support	1,000	None	Charitable	501(c)(3)
House of Ruth	5,000	None	Charitable	501(c)(3)
Housing Assistance Corporation	250	None	Charitable	501(c)(3)
Human Rights Center, University of Berkeley	25,000	None	Charitable	501(c)(3)
Incentive Mentoring Program	1,000	None	Charitable	501(c)(3)
INNterim Housing Corp	1,000	None	Charitable	501(c)(3)
Institute for Christian & Jewish Studies	3,000	None	Charitable	501(c)(3)
International Center for Transitional Justice	10,000	None	Charitable	501(c)(3)
International Documentary Association	5,000	None	Charitable	501(c)(3)
Jewish Cemetery Association of Greater Baltimore	3,000	None	Charitable	501(c)(3)
Jewish Funds for Justice	20,000	None	Charitable	501(c)(3)
Jewish Museum of Maryland	300	None	Charitable	501(c)(3)
Jewish Womens Archives	1,000	None	Charitable	501(c)(3)
Johns Hopkins Children's Center	100	None	Charitable	501(c)(3)
Johns Hopkins Institutions	50	None	Charitable	501(c)(3)
Just Vision	5,000	None	Charitable	501(c)(3)
Kennedy-Krieger Institute	10,000	None	Charitable	501(c)(3)
Living Classroom Foundation - Girls' Empowerment Mission	75	None	Charitable	501(c)(3)
Marion House	350	None	Charitable	501(c)(3)
Maryland Art Place	1,000	None	Charitable	501(c)(3)
Maryland Citizens for the Arts	1,000	None	Charitable	501(c)(3)
Maryland Food Bank	2,000	None	Charitable	501(c)(3)
Maryland Historical Society	600	None	Charitable	501(c)(3)
Maryland Humanities Council	1,000	None	Charitable	501(c)(3)
Maryland Institute of Art	5,000	None	Charitable	501(c)(3)
Maryland Public TV	1,000	None	Charitable	501(c)(3)
MD Disability Law Center	500	None	Charitable	501(c)(3)
MD Volunteer Lawyers Service	250	None	Charitable	501(c)(3)
Meals on Wheels	1,000	None	Charitable	501(c)(3)
Mercy Medical Center - Weinberg Center for Women's Health	2,500	None	Charitable	501(c)(3)
MICA - 1st Installment for EB Memorial	168,000	None	Charitable	501(c)(3)
Middle Grades Partnership	1,000	None	Charitable	501(c)(3)
Mothers Against Drunk Driving	250	None	Charitable	501(c)(3)
National Alliance for the Mentally Ill of Baltimore	2,500	None	Charitable	501(c)(3)
National Immigration Project	5,000	None	Charitable	501(c)(3)
National Senior Citizens Law Center	2,500	None	Charitable	501(c)(3)
New Israel Fund	5,000	None	Charitable	501(c)(3)
Open Society Institute	25,000	None	Charitable	501(c)(3)
Outer Cape Health Services, Inc	300	None	Charitable	501(c)(3)
Parks & People Foundation	3,500	None	Charitable	501(c)(3)
Personal Ponies	300	None	Charitable	501(c)(3)
Planned Parenthood of Maryland	10,000	None	Charitable	501(c)(3)
Pro Bono Counseling Service	1,000	None	Charitable	501(c)(3)
Public Justice Center	50,000	None	Charitable	501(c)(3)
Sheppard & Enoch Pratt Health Systems	13,750	None	Charitable	501(c)(3)
Southern Poverty Law Center	500	None	Charitable	501(c)(3)
Special Olympics of Maryland	200	None	Charitable	501(c)(3)
St Francis Academy	1,100	None	Charitable	501(c)(3)
Stanford University	5,000	None	Charitable	501(c)(3)
Stocks in the Future	1,000	None	Charitable	501(c)(3)
The Ark	1,500	None	Charitable	501(c)(3)
The Associated	40,000	None	Charitable	501(c)(3)
The Edward E. Wallach, M D Reproductive (continued)	2,000	None	Charitable	501(c)(3)
Endocrinology and Infertility Fund		None	Charitable	501(c)(3)
The Family Tree	4,000	None	Charitable	501(c)(3)
The Peabody Institute	500	None	Charitable	501(c)(3)
The Samantan Community	500	None	Charitable	501(c)(3)

(continued)

The Lois and Irving Blum Foundation, Inc
Schedule of Grants Paid
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The Smile Train	250	None	Charitable	501(c)(3)
Tides Foundation - Anonymous Fund	240,000	None	Charitable	501(c)(3)
Truro Center for the Arts at Castle Hill	250	None	Charitable	501(c)(3)
U of CA, Berkely	25,000	None	Charitable	501(c)(3)
United Way of Central Maryland	12,500	None	Charitable	501(c)(3)
V-Linc, Inc - VME and Linc Together	10,000	None	Charitable	501(c)(3)
Walters Art Museum	1,000	None	Charitable	501(c)(3)
Witness	2,500	None	Charitable	501(c)(3)
Women's Medical Fund	2,000	None	Charitable	501(c)(3)
WYPR	1,000	None	Charitable	501(c)(3)
	<u>\$ 1,022,695</u>			

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► File a separate application for each return.

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

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

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

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

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

Part I only

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

Type or print	Name of exempt organization or other filer, see instructions THE LOIS & IRVING BLUM FOUNDATION, INC.	Employer identification number (EIN) or ☒ 52-6057035
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P O box, see instructions 233 EAST REDWOOD STREET, NO. 100	Social security number (SSN) ☐
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. BALTIMORE, MD 21202	

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

04

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

LOIS & IRVING BLUM FOUNDATION

- The books are in the care of ► **233 EAST REDWOOD STREET - BALTIMORE, MD 21202**

Telephone No ► **410-356-5900**

FAX No ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **NOVEMBER 15, 2012**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ☐ calendar year _____ or
- ☒ tax year beginning **APR 1, 2011**, and ending **MAR 31, 2012**

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	2,874.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	5,020.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

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

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 1-2012)