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Form 990-PF

## 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 07-01-2011, and ending 06-30-2012

G Check all that apply

- Initial return     Initial return of a former public charity     Final return  
 Amended return     Address change     Name change

Name of foundation

Max H Gluck Foundation Inc

## A Employer identification number

95-3979100

Number and street (or P O box number if mail is not delivered to street address)  
PO Box 55516

Room/suite

B Telephone number (see page 10 of the instructions)  
(310) 519-1417City or town, state, and ZIP code  
Sherman Oaks, CA 91413C If exemption application is pending, check here    
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  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) \$ 100,785,145

J Accounting method  Cash  Accrual  
 Other (specify) (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) (see page 11 of the instructions))

(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 (attach schedule)	709,890		
2 Check <input type="checkbox"/> <input type="checkbox"/> if the foundation is not required to attach Sch B			
3 Interest on savings and temporary cash investments	12,329	12,329	
4 Dividends and interest from securities. . . . .	3,023,938	3,023,938	
5a Gross rents . . . . .			
b Net rental income or (loss) _____			
6a Net gain or (loss) from sale of assets not on line 10	-52,174		
b Gross sales price for all assets on line 6a 73,492,732			
7 Capital gain net income (from Part IV, line 2) . . . . .			
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) (attach schedule) . . . . .			
11 Other income (attach schedule) . . . . .			
12 Total. Add lines 1 through 11 . . . . .	3,693,983	3,036,267	

13 Compensation of officers, directors, trustees, etc	83,400	5,300	72,060
14 Other employee salaries and wages . . . . .	44,449		24,000
15 Pension plans, employee benefits . . . . .			
16a Legal fees (attach schedule) . . . . .			
b Accounting fees (attach schedule) . . . . .	173,132	153,830	19,302
c Other professional fees (attach schedule) . . . . .	626,599	617,002	5,000
17 Interest . . . . .			
18 Taxes (attach schedule) (see page 14 of the instructions)	114,597	67,645	
19 Depreciation (attach schedule) and depletion . . . . .	134		
20 Occupancy . . . . .	11,927	3,930	5,568
21 Travel, conferences, and meetings . . . . .	10,790	171	10,179
22 Printing and publications . . . . .			
23 Other expenses (attach schedule) . . . . .			
24 Total operating and administrative expenses.			
Add lines 13 through 23 . . . . .	1,065,028	847,878	136,109
25 Contributions, gifts, grants paid. . . . .	4,679,803		3,963,644
26 Total expenses and disbursements. Add lines 24 and 25	5,744,831	847,878	4,099,753
27 Subtract line 26 from line 12			
a Excess of revenue over expenses and disbursements	-2,050,848		
b Net investment income (if negative, enter -0-) . . . . .		2,188,389	
c Adjusted net income (if negative, enter -0-) . . . . .			

<b>Part III</b> <b>Balance Sheets</b>	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
<b>1</b>	Cash—non-interest-bearing . . . . .			
<b>2</b>	Savings and temporary cash investments . . . . .	15,869,775	14,210,597	14,210,597
<b>3</b>	Accounts receivable ► 292,858			
	Less allowance for doubtful accounts ►	892,050	292,858	292,858
<b>4</b>	Pledges receivable ►			
	Less allowance for doubtful accounts ►			
<b>5</b>	Grants receivable . . . . .			
<b>6</b>	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions) . . . . .			
<b>7</b>	Other notes and loans receivable (attach schedule) ►			
	Less allowance for doubtful accounts ►			
<b>8</b>	Inventories for sale or use . . . . .			
<b>9</b>	Prepaid expenses and deferred charges . . . . .		56,000	56,000
<b>10a</b>	Investments—U S and state government obligations (attach schedule)	12,031,483	9,675,326	9,675,326
<b>b</b>	Investments—corporate stock (attach schedule) . . . . .	47,624,119	33,983,744	33,983,744
<b>c</b>	Investments—corporate bonds (attach schedule) . . . . .	14,984,514	20,077,597	20,077,597
<b>11</b>	Investments—land, buildings, and equipment basis ►			
	Less accumulated depreciation (attach schedule) ►			
<b>12</b>	Investments—mortgage loans . . . . .			
<b>13</b>	Investments—other (attach schedule) . . . . .	22,150,510	22,488,467	22,488,467
<b>14</b>	Land, buildings, and equipment basis ► 4,825			
	Less accumulated depreciation (attach schedule) ► 4,269	690	556	556
<b>15</b>	Other assets (describe ► )			
<b>16</b>	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	113,553,141	100,785,145	100,785,145
<b>17</b>	Accounts payable and accrued expenses . . . . .	7,328,712	199,391	
<b>18</b>	Grants payable . . . . .	4,164,907	4,681,066	
<b>19</b>	Deferred revenue . . . . .			
<b>20</b>	Loans from officers, directors, trustees, and other disqualified persons			
<b>21</b>	Mortgages and other notes payable (attach schedule) . . . . .			
<b>22</b>	Other liabilities (describe ► )	12,101		
<b>23</b>	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	11,505,720	4,880,457	
	<b>Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/></b> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
<b>24</b>	Unrestricted . . . . .	102,047,421	95,904,688	
<b>25</b>	Temporarily restricted . . . . .			
<b>26</b>	Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/></b> <b>and complete lines 27 through 31.</b>			
<b>27</b>	Capital stock, trust principal, or current funds . . . . .			
<b>28</b>	Paid-in or capital surplus, or land, bldg , and equipment fund			
<b>29</b>	Retained earnings, accumulated income, endowment, or other funds			
<b>30</b>	<b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	102,047,421	95,904,688	
<b>31</b>	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	113,553,141	100,785,145	

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b>	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) . . . . .	<b>1</b>	102,047,421
<b>2</b>	Enter amount from Part I, line 27a . . . . .	<b>2</b>	-2,050,848
<b>3</b>	Other increases not included in line 2 (itemize) ►	<b>3</b>	
<b>4</b>	Add lines 1, 2, and 3 . . . . .	<b>4</b>	99,996,573
<b>5</b>	Decreases not included in line 2 (itemize) ►	<b>5</b>	4,091,885
<b>6</b>	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	<b>6</b>	95,904,688

**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.)	
1 a	Capital gains	P	2010-01-01	2012-06-30	
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	73,492,732		73,544,906	-52,174	
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				-52,174	
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	-52,174
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)			3	
If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8					

**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 page 18 of 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	4,888,394	98,910,653	0 04942
2009	2,056,859	34,076,517	0 06036
2008	2,567,647	35,098,352	0 07316
2007	2,653,033	47,458,759	0 05590
2006	2,942,848	48,353,098	0 06086
2			2 0 29970
3			3 0 05994
4			4 96,853,487
5			5 5,805,398
6			6 21,884
7			7 5,827,282
8			8 4,099,753

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 on page 18

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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 _____ <b>(attach copy of letter if necessary—see instructions)</b>		1	43,768
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		
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	43,768
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . . . .	5	43,768
6	<b>Credits/Payments</b>		
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a	100,000
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	100,000
8	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached <input checked="" type="checkbox"/>	8	432
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	10	55,800
11	Enter the amount of line 10 to be <b>Credited to 2012 estimated tax</b> <input type="checkbox"/> 55,800 <b>Refunded</b> <input type="checkbox"/>	11	

**Part VII-A Statements Regarding Activities**

		<b>Yes</b>	<b>No</b>
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	No
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . .	1b	No
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.			
c	Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .	1c	No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year <b>(1)</b> On the foundation <input type="checkbox"/> \$ _____ <b>(2)</b> 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? . . . . . If "Yes," attach a detailed description of the activities.	2	No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes . . . . .	3	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	4a	No
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	4b	No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . If "Yes," attach the statement required by General Instruction T.	5	No
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	Yes
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input type="checkbox"/> CA		
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes
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 on page 27)? If "Yes," complete Part XIV . . . . .	9	No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses <input checked="" type="checkbox"/>	10	Yes

**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 page 20 of the instructions). . . . .	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? . . . . .	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <a href="http://gluckfoundation.org">gluckfoundation.org</a>	13	Yes	
14	The books are in care of ► <u>Johanna E Zimmerman CPA</u> Telephone no ► (310) 276-6962 Located at ► <u>818 North Doheny Drive 207 West Hollywood CA</u> ZIP +4 ► <u>900694857</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . ► <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year. . . . . ► <input type="checkbox"/> 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
See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ► <u>CJ</u>				

**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
<b>1a</b>	During the year did the foundation (either directly or indirectly)		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ► <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . . ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). . . . . ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b>	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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 page 20 of the instructions)? . . . . . Organizations relying on a current notice regarding disaster assistance check here. . . . . ► <input type="checkbox"/>	1b	No
<b>c</b>	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	No
<b>2</b>	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))		
<b>a</b>	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? . . . . . ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>	2b	No
<b>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see page 20 of the instructions) . . . . .		
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
<b>3a</b>	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	3b	No
<b>b</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). . . . .		
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .	4a	No
<b>b</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	No

**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))? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Provide a grant to an individual for travel, study, or other similar purposes? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 page 22 of the instructions). . . . . <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here. . . . . <input type="checkbox"/> Yes	5b	No
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? . . . . . <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i> <input checked="" type="checkbox"/>		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . . <i>If "Yes" to 6b, file Form 8870.</i>		
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b	No
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . .		

**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 page 22 of the instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation <b>(If not paid, enter -0-)</b>	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

**2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the 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				
<b>Total number of other employees paid over \$50,000.</b>				<input type="checkbox"/>

**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

**3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".**

## **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
<b>1</b>		
<b>2</b>		
<b>3</b>		
<b>4</b>		

**Part IX-B Summary of Program-Related Investments** (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2		Amount
<b>1</b>		
<b>2</b>		
All other program-related investments See page 24 of the instructions		
<b>3</b>		
<b>Total</b>	Add lines 1 through 3	

**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	92,433,141
b	Average of monthly cash balances. . . . .	1b	5,895,272
c	Fair market value of all other assets (see page 24 of the instructions). . . . .	1c	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	<b>98,328,413</b>
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	
3	Subtract line 2 from line 1d. . . . .	3	98,328,413
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions). . . . .	4	1,474,926
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	96,853,487
6	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	6	4,842,674

**Part XI Distributable Amount** (see page 25 of the 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	4,842,674
2a	Tax on investment income for 2011 from Part VI, line 5. . . . .	2a	43,768
b	Income tax for 2011 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	43,768
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	4,798,906
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	
5	Add lines 3 and 4. . . . .	5	4,798,906
6	Deduction from distributable amount (see page 25 of the instructions). . . . .	6	
7	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	4,798,906

**Part XII Qualifying Distributions** (see page 25 of the 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	4,099,753
b	Program-related investments—total from Part IX-B. . . . .	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	
3	Amounts set aside for specific charitable projects that satisfy the	3a	
a	Suitability test (prior IRS approval required). . . . .	3b	
b	Cash distribution test (attach the required schedule). . . . .	4	4,099,753
4	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	5	
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 page 26 of the instructions). . . . .	6	4,099,753
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .		

**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 page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
<b>1</b> Distributable amount for 2011 from Part XI, line 7				4,798,906
<b>2</b> Undistributed income, if any, as of the end of 2011				
<b>a</b> Enter amount for 2010 only. . . . .				
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2011				
<b>a</b> From 2006. . . . .	593,575			
<b>b</b> From 2007. . . . .	358,222			
<b>c</b> From 2008. . . . .	858,681			
<b>d</b> From 2009. . . . .	381,079			
<b>e</b> From 2010. . . . .	55,966			
<b>f Total</b> of lines 3a through e. . . . .	2,247,523			
<b>4</b> Qualifying distributions for 2011 from Part XII, line 4 ► \$ _____ 4,099,753				
<b>a</b> Applied to 2010, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
<b>c</b> Treated as distributions out of corpus (Election required—see page 26 of the instructions). . . . .	0			
<b>d</b> Applied to 2011 distributable amount. . . . .				4,099,753
<b>e</b> Remaining amount distributed out of corpus				
<b>5</b> Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)	699,153			699,153
<b>6</b> Enter the net total of each column as indicated below:	1,548,370			
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5				
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b. . . . .				
<b>c</b> 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. . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . . . .				
<b>e</b> Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions . . . . .				
<b>f</b> Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011. . . . .				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions). . . . .				
<b>8</b> Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the instructions). . . . .				
<b>9</b> Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a . . . . .	1,548,370			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2007. . . . .	252,644			
<b>b</b> Excess from 2008. . . . .	858,681			
<b>c</b> Excess from 2009. . . . .	381,079			
<b>d</b> Excess from 2010. . . . .	55,966			
<b>e</b> Excess from 2011. . . . .				

**Part XIV Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9)

1a	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling. ►			
b	Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)			
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.			
b	85% of line 2a.			
c	Qualifying distributions from Part XII, line 4 for each year listed.			
d	Amounts included in line 2c not used directly for active conduct of exempt activities.			
e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c.			
3	Complete 3a, b, or c for the alternative test relied upon			
a	"Assets" alternative test—enter			
(1)	Value of all assets.			
(2)	Value of assets qualifying under section 4942(j)(3)(B)(i)			
b	"Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.			
c	"Support" alternative test—enter			
(1)	Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).			
(2)	Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).			
(3)	Largest amount of support from an exempt organization			
(4)	Gross investment income			

**Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the 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) )

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

**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 page 28 of the 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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b> See Additional Data Table				
<b>Total</b>			► 3a	4,163,644
<b>b Approved for future payment</b>				
<b>Total</b>			► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		(e) Related or exempt function income (See page 28 of the instructions )
		(a) Business code	(b) Amount	
<b>1</b> Program service revenue				
a				
b				
c				
d				
e				
f				
<b>g</b> Fees and contracts from government agencies				
<b>2</b> Membership dues and assessments. . . . .				
<b>3</b> Interest on savings and temporary cash investments		14	12,329	
<b>4</b> Dividends and interest from securities. . . . .		14	3,023,938	
<b>5</b> Net rental income or (loss) from real estate				
a Debt-financed property. . . . .				
b Not debt-financed property. . . . .				
<b>6</b> Net rental income or (loss) from personal property				
<b>7</b> Other investment income. . . . .				
<b>8</b> Gain or (loss) from sales of assets other than inventory		18	-52,174	
<b>9</b> Net income or (loss) from special events				
<b>10</b> Gross profit or (loss) from sales of inventory. . . . .				
<b>11</b> Other revenue a _____				
b _____				
c _____				
d _____				
e _____				
<b>12</b> Subtotal Add columns (b), (d), and (e). . . . .				2,984,093
<b>13</b> <b>Total.</b> Add line 12, columns (b), (d), and (e). . . . .				2,984,093
(See worksheet in line 13 instructions on page 28 to verify calculations )				

**Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes**

**Part XVII** **Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

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 or**

**b Other transactions**

- (1) Sales of assets to a noncharitable exempt organization. . . . .
- (2) Purchases of assets from a noncharitable exempt organization. . . . .
- (3) Rental of facilities, equipment, or other assets. . . . .
- (4) Reimbursement arrangements. . . . .
- (5) Loans or loan guarantees. . . . .
- (6) Performance of services or membership or fundraising solicitations. . . . .

**c Sharing of facilities, equipment, mailing lists, other assets, or paid employees**

**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.

	Yes	No
<b>1a(1)</b>		No
<b>1a(2)</b>		No
<b>1b(1)</b>		No
<b>1b(2)</b>		No
<b>1b(3)</b>		No
<b>1b(4)</b>		No
<b>1b(5)</b>		No
<b>1b(6)</b>		No
<b>1c</b>		No

**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		
<p>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 or fiduciary) is based on all information of which preparer has any knowledge.</p>				
<p>*****</p>	<p>2013-05-14</p>	<p>*****</p>		
<p>Signature of officer or trustee</p>	<p>Date</p>	<p>Title</p>		
<p><b>Sign Here</b>  <b>Paid Preparer's Use Only</b></p>	<p>Preparer's Signature</p>	<p>Date</p>	<p>Check if self-employed <input checked="" type="checkbox"/></p>	<p>PTIN</p>
	<p>Johanna E Zimmerman</p>			
	<p>Firm's name</p>	<p>Johanna E Zimmerman CPA</p>		<p>Firm's EIN</p>
	<p>818 North Doheny Drive 207</p>			
<p>Firm's address</p>	<p>West Hollywood, CA 900694857</p>		<p>Phone no</p>	<p>(310) 276-6962</p>

May the IRS discuss this return with the preparer shown above? See instructions . . . . .  Yes  No

**Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation**

<b>(a) Name and address</b>	<b>(b) Title, and average hours per week devoted to position</b>	<b>(c) Compensation (If not paid, enter -0-)</b>	<b>(d) Contributions to employee benefit plans and deferred compensation</b>	<b>(e) Expense account, other allowances</b>
Camilla Townsend	Executive Dir 25 00	73,400		
2019 West 35th Street San Pedro, CA 90732				
Betty S Shelhamer	Director 1 00	2,000		
P O Box 55516 Sherman Oaks, CA 91413				
Julie Kaswick	Secretary 1 00	2,000		
P O Box 55516 Sherman Oaks, CA 91413				
Jennifer Kaswick	Secretary 1 00	2,000		
P O Box 55516 Sherman Oaks, CA 91413				
Richard Reinis	Director 1 00	2,000		
2121 Ave of the Stars Ste 900 Los Angeles, CA 90067				
Jon A Kaswick MD	President 2 00	2,000		
P O Box 55516 Sherman Oaks, CA 91413				

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
Radio Plays Perf Proj- Gregg Oppenb 524 9th Street Santa Monica, CA 90402	None	N/A	Perform radio play at home for the aged	750
New Visions Foundation3131 Olympic Boulevard Santa Monica, CA 90404	None	Public	Arts Education	150,000
Music CenterPerforming Arts Center 135 North Grand Avenue Los Angeles, CA 90012	None	Public	Enrich education of students in music	50,000
Los Angeles Philharmonic Associatio 135 No Grand Ave Los Angeles, CA 90012	None	Public	Arts Education	217,850
LA Opera135 No Grand Ave Los Angeles, CA 90012	None	Public	Arts Education	143,500
LA's Best200 No Spring St Ste M- 120 Los Angeles, CA 90012	None	Public	Arts Education	50,000
Constitutional Rights Foundation601 So Kingsley Dr Los Angeles, CA 90005	None	Public	Arts Education	28,000
Children's Hospital of Los Angeles 3303 Wilshire Boulevard Ste 320 Los Angeles, CA 90010	None	Public	Hospital patient arts education	50,000
Carnegie HallThe Academy Program 881 Seventh Avenue New York, NY 10019	None	Public	Arts Education	150,000
Angeles Gate Cultural Center3601 So Gaffey Street San Pedro, CA 90731	None	Public	Arts Education	100,000
Regents of UC-Riverside900 University Ave/3143 HMNSS Riverside, CA 92521	None	Public	Music education/student fellowships	600,000
Los Angeles Co HS for the Arts Foun 1149 So Hill St Ste H100 Los Angeles, CA 90015	None	Public	Arts education	113,810
The Coburn School200 S Grand Ave Los Angeles, CA 90012	None	Public	Summer Encounter arts education program	141,575
Orange Co HS of the Arts Fdtn1010 N Main Street Santa Ana, CA 92701	None	Public	Support community service arts programs	75,000
Los Angeles Co Museum of Art5905 Wilshire Blvd Los Angeles, CA 90036	None	Public	Maya art truck/art education LAUSD	539,144
Regents of UC-Los Angeles2539 Schoenberg Hall Los Angeles, CA 90095	None	Public	Music Education/Student fellowships	658,015
Nat Hist Museum LA Co900 Exposition Blvd Los Angeles, CA 90007	None	Public	Three science trucks for LAUSD science education	626,000
The Juilliard School60 Lincoln Center New York, NY 10023	None	Public	Student fellowship program	275,000
San Diego Opera1200 3rd Avenue San Diego, CA 92101	None	Public	Opera outreach programs	195,000
<b>Total . . . . .</b>			<b>► 3a</b>	<b>4,163,644</b>

2011

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

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

**Name of organization**  
Max H Gluck Foundation Inc**Employer identification number**

95-3979100

**Organization type (check one)****Filers of:****Section:**

Form 990 or 990-EZ

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

Form 990-PF

- 501(c)(3) exempt private foundation  
 4947(a)(1) nonexempt charitable trust treated as a private foundation  
 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions**General Rule—**

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

**Special Rules**

- For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 33<sup>1/3</sup>% 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, aggregate 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 aggregate 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 in the heading of its Form 990-EZ, or on 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**  
 Max H Gluck Foundation Inc
**Employer identification number**

95-3979100

<b>Part I</b> <b>Contributors</b> (see Instructions) Use duplicate copies of Part I if additional space is needed			
<b>(a)</b> No.	<b>(b)</b> Name, address, and ZIP + 4	<b>(c)</b> Aggregate contributions	<b>(d)</b> Type of contribution
1	Muriel S Gluck Living Trust 818 North Doheny Drive 207  West Hollywood, CA 900694857	\$ 709,890	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 )
			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 Max H Gluck Foundation Inc		Employer identification number 95-3979100	
<b>Part III</b> <b>Exclusive/y religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year.</b> (Complete columns (a) through (e) and the following line entry ) For organizations completing Part III, enter the total of <i>exclusive/y religious, charitable, etc., contributions of \$1,000 or less</i> 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	
—	—	—	—
(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	
—	—	—	—
(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	
—	—	—	—
(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	
—	—	—	—

## TY 2011 Accounting Fees Schedule

**Name:** Max H Gluck Foundation Inc

**EIN:** 95-3979100

**Software ID:** 11000144

**Software Version:** 2011v1.5

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Audit fees	9,757	6,917	0	2,840
Accounting fees	163,375	146,913	0	16,462

## TY 2011 Contractor Compensation Explanation

**Name:** Max H Gluck Foundation Inc

**EIN:** 95-3979100

**Software ID:** 11000144

**Software Version:** 2011v1.5

Contractor	Explanation
Johanna E Zimmerman CPA	Responsible for all accounting, payroll, and tax functions.

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

## TY 2011 Depreciation Schedule

**Name:** Max H Gluck Foundation Inc

**EIN:** 95-3979100

**Software ID:** 11000144

**Software Version:** 2011v1.5

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Office Filing Cabinets	2006-08-24	1,337	402	91	10 0000	134			

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

## TY 2011 Expenditure Responsibility Statement

**Name:** Max H Gluck Foundation Inc

**EIN:** 95-3979100

**Software ID:** 11000144

**Software Version:** 2011v1.5

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
Radio Plays Perf Proj G Oppenheimer	524 9th Street Santa Monica, CA 90402	2011-09-26	750	Perform Radio Play at Senior Home	750	No	10/15/11	2011-10-15	Grant check was made payable to the Motion Picture & Television Fund Foundation President attended performance of the Radio Play at the designated Senior Care Facility Grant amount was for sound effects and the cash went directly to the Guild Performance was successful and enjoyed by all attendees

**TY 2011 Land, Etc. Schedule****Name:** Max H Gluck Foundation Inc**EIN:** 95-3979100**Software ID:** 11000144**Software Version:** 2011v1.5

<b>Category / Item</b>	<b>Cost / Other Basis</b>	<b>Accumulated Depreciation</b>	<b>Book Value</b>	<b>End of Year Fair Market Value</b>
Furniture and Fixtures	4,825	4,269	556	556

## TY 2011 Other Decreases Schedule

**Name:** Max H Gluck Foundation Inc**EIN:** 95-3979100**Software ID:** 11000144**Software Version:** 2011v1.5

Description	Amount
Unrealized loss on investments	4,091,885

## TY 2011 Other Professional Fees Schedule

**Name:** Max H Gluck Foundation Inc**EIN:** 95-3979100**Software ID:** 11000144**Software Version:** 2011v1.5

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Technological consulting	9,597	0	0	5,000
Broker advisory fees	617,002	617,002	0	0

## TY 2011 Substantial Contributors Schedule

**Name:** Max H Gluck Foundation Inc

**EIN:** 95-3979100

**Software ID:** 11000144

**Software Version:** 2011v1.5

Name	Address
Muriel S Gluck Living Trust	8518 North Doheny Drive West Hollywood, CA 90069

## TY 2011 Taxes Schedule

**Name:** Max H Gluck Foundation Inc**EIN:** 95-3979100**Software ID:** 11000144**Software Version:** 2011v1.5

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
State filing fee	10			
Penalties	152			
Foreign tax withheld	67,645	67,645		
Excise taxes	46,790			

**SCHEDULE OF ASSETS****FORM 990PF (2011) MAX H. GLUCK FOUNDATION, INC.****FEIN 95-3979100****Part II Balance sheets****Line 13 Investments - Other Assets****Description**

	<b>VALUATION METHOD</b>	<b>BOOK VALUE</b>
CREDIT SUISSE NASSAU BRH EXCH TRADED NTS LKD CS LONG/SHORT LIQ IND	Market Value	2,014,650
CREDIT SUISSE NASSAU BRH EXCH TRD NT LKD CS MERGER ARB IND	Market Value	1,975,000
TEMPLETON GLOBAL BOND FUND CLASS A	Market Value	7,167,070
ISHARES TR BARCLAYS 1-3 YR TREAS BD FD	Market Value	1,765,020
ISHARES TR BARCLAYS 3-7 YR TREAS BD FD	Market Value	1,777,965
PROSHARES TR PROSHARES ULTRA 7-10 YR TRES	Market Value	1,591,438
CREDIT SUISSE DOLLAR SENIOR LOAN FUND	Market Value	6,197,324
<b>Total Other Assets</b>		<b><u>22,488,467</u></b>

**SCHEDULE OF ASSETS**
**FORM 990PF (2011) MAX H. GLUCK FOUNDATION, INC.**
**FEIN 95-3979100**
**Part II Balance sheets**

<b>Line 10c Investments - Corporate Bonds</b>	<b>VALUATION METHOD</b>	<b>BOOK VALUE</b>
AMERICAN EXPRESS CR CORP NT 7 300% 08/20/13	Market Value	379,552
ANHEUSER BUSCH INBEV WWD INC GTD NT 5 375% 01/15/20 CLB	Market Value	381,318
AT&T INC GLOBAL NTS FIXED RT 2 50% 08/15/15 CLB	Market Value	390,379
BEAR STEARNS & CO INC GLOBAL NT 5 70% 11/15/14 CLB	Market Value	373,321
COOPERATIVE CENTRALE RAIFFEISEN BOERENLEENBANK B A 3 375% 01/19/17	Market Value	385,946
COUNTRYWIDE FINL CORP INC SUB NT 6 250% 05/15/16	Market Value	379,892
GEN ELEC CAPTL CORP MTN 5 625% 05/01/18	Market Value	758,696
GOLDMAN SACHS INC 3 625% 02/07/16	Market Value	385,042
INT BUSINESS MACHS CORP NT 5 700% 09/14/17 CLB	Market Value	390,744
MERRILL LYNCH & CO INC SER C R 5 450% 07/15/14	Market Value	381,903
MORGAN STANLEY SR NT 6 00% 05/13/14	Market Value	393,881
OMNICOM GROUP INC SR DEBT SECS 5 900% 04/15/16 CLB	Market Value	766,206
PRUDENTIAL FINL INC MED TERM NTS SER B R 5 100% 09/20/14	Market Value	380,514
TELEFONICA EMISIONES SAU GTD SR NT 4 949% 01/15/15 CLB	Market Value	363,983
TRANSOCEAN INC NTS 6 000% 03/15/18 CLB	Market Value	390,954
VERIZON COMMUNICATIONS INC NT 8 750% 11/01/18 CLB	Market Value	377,998
VERIZON WIRELESS CAP LLC 8 500% 11/15/18 CLB	Market Value	389,991
WAL MART STORES INC 5 800% 02/15/18 CLB	Market Value	388,178
WESTPAC BKG CORP NT 3 000% 08/04/15 CLB	Market Value	383,262
AMERENENERGY GENERATING CO SR NT 7 000% 04/15/18	Market Value	371,950
ARCELORMITTAL SA LUXEMBOURG NT 3 750% 08/05/15 CLB	Market Value	367,022
CENTURYTEL INC SER S 6 450% 06/15/21 CLB	Market Value	463,058
CHESAPEAKE ENERGY CORP GTD SR 6 125% 02/15/21 CLB	Market Value	295,087
CITIGROUP INC GLOBAL SR NT 5 125% 05/05/14 CLB	Market Value	359,752
ERICSSON TELEFONAKTIEBOLAGET NT 4 125% 05/15/22 CLB	Market Value	381,053
GATX CORP FIXED RT SR NT 4 750% 05/15/15 CLB	Market Value	375,071
GENL ELEC CAP CORP MED TERM NTS SER A 5 375% 10/20/16	Market Value	378,892
GENWORTH FINL INC SR NT 6 515% 05/22/18 CLB	Market Value	407,269
GOLDMAN SACHS GR INC SR NT 5 500% 11/15/14 CLB	Market Value	359,094
HOME DEPOT INC SR NT 5 400% 03/01/16 CLB	Market Value	345,846
ICAHN ENTERPRISES L P/ICAHN ENT FIN CO GTD SR NT 8 000% 01/15/18	Market Value	377,187
INTERNATIONAL LEASE FIN CORP SR NT 5 750% 05/15/16	Market Value	380,468
JEFFERIES GROUP INC NEW SR NT 5 125% 04/13/18 CLB	Market Value	402,550
MASCO CORP NT 6 125% 10/03/16 CLB	Market Value	453,560
MERRILL LYNCH & CO INC MED TR NTS 6 500% 07/15/18 CLB	Market Value	387,392
MORGANSTANLEY/DEANWITTER DISCOVER FIXED RT STEP-UP 3 500% 10/15/20	Market Value	33,454
MORGAN STANLEY GRP INC MED TRM SR NTS 4 000% 07/30/20	Market Value	404,550
NEXTEL COMMUNICATIONS INC SR SER RED NT SER E 6 875% 10/31/13	Market Value	125,469
NRG ENERGY INC SR NT - FULLY EXC ORIGINAL CUSIP 629377B5 7 625% 01/15/18	Market Value	476,100
SIMON PPTY GROUP L P NT 5 100% 06/15/15	Market Value	380,828
SLM CORP MEDIUM TERM NTS R 5 000% 10/01/13	Market Value	442,900
TYCO INTL FINANCE S A GTD NT 3 375% 10/15/15	Market Value	350,327
VALERO ENERGY CORP NEW NT 6 125% 06/15/17	Market Value	384,124
ZURICH REINS CENTRE HLDGS INC SR NT 7 125% 10/15/23	Market Value	358,934
BARCLAYS FINL LLC NT LKD WORSE PERFORATION OUT OF TWO 8 500% 12/31/13 CLB	Market Value	492,150
BARCLAYS FINL LLC NT LKD WORSE PERFORATION OUT OF TWO 8 750% 11/29/13 CLB	Market Value	494,850
CREDIT SUISSE SECS USA 0 000% 07/30/13	Market Value	1,000,300
JPMORGAN CHASE BK NT S R 8 000% 11/04/13 CLB	Market Value	986,600
<b>TOTAL CORPORATE BONDS</b>		<b>20,077,597</b>

**SCHEDULE OF ASSETS****FEIN 95-3979100****FORM 990PF (2011) MAX H. GLUCK FOUNDATION, INC.****Part II Balance sheets**

<b>Line 10b Investments - Corporate Stock</b>	<b>VALUATION METHOD</b>	<b>BOOK VALUE</b>
ACCENTURE PLC IRELAND	Market Value	147,701
AGILENT TECHNOLOGIES INC	Market Value	127,491
AIRGAS INC	Market Value	124,755
AMAZON COM INC	Market Value	274,477
AMERISOURCE BERGEN CORP	Market Value	137,882
AMPHENOL CORP NEW CL A	Market Value	211,826
APPLE INC	Market Value	379,016
CBRE GROUP INC CL A	Market Value	113,882
CELGENE CORP	Market Value	83,344
CITRIX SYSTEMS INC	Market Value	306,885
COGNIZANT TECHNOLOGY SOLUTIONS CORP	Market Value	143,880
COOPER INDs PLC	Market Value	131,315
CSX CORPORATION	Market Value	142,165
CUMMINS INC	Market Value	211,845
DEERE & CO	Market Value	197,808
EDWARDS LIFESCIENCES CORP	Market Value	129,435
ESTEE LAUDER COMPANIES INC CL A	Market Value	200,948
EXPRESS SCRIPTS HLDG CO	Market Value	130,586
F5 NETWORKS INC	Market Value	136,596
FLOWSERVE CORP	Market Value	191,174
FMC TECHNOLOGIES INC	Market Value	118,082
FOSSIL INC	Market Value	107,615
GOOGLE INC CL A	Market Value	145,018
HALLIBURTON CO	Market Value	68,590
HOME DEPOT INC	Market Value	136,502
INTUITIVE SURGICAL INC	Market Value	259,728
JACOBS ENGR GROUP INC	Market Value	114,224
JOY GLOBAL INC	Market Value	192,201
MASTERCARD INC CL A	Market Value	197,851
METTLER-TOLEDO INTL INC	Market Value	108,472
MICROCHIP TECHNOLOGY INC	Market Value	149,852
MONSTER BEVERAGE CORP	Market Value	104,664
NETAPP INC	Market Value	150,636
NETFLIX INC	Market Value	68,143
ORACLE CORP	Market Value	141,134
PERRIGO COMPANY	Market Value	200,363
PRECISION CASTPARTS CORP	Market Value	240,484
PRICELINE COM INC	Market Value	303,686
QUALCOMM INC	Market Value	130,514
RALPH LAUREN CORP CL A	Market Value	244,405
SHERWIN WILLIAMS CO	Market Value	179,334
STARBUCKS CORP	Market Value	254,870
TIFFANY & COMPANY	Market Value	98,805
TRIMBLE NAV LTD	Market Value	91,836
WATERS CORP	Market Value	146,384
WYNN RESORTS LTD	Market Value	105,898

**SCHEDULE OF ASSETS (Continued)**  
**FORM 990PF (2011) MAX H. GLUCK FOUNDATION, INC.**  
**Part II Balance sheets**

**FEIN 95-3979100**

<b>Line 10b Investments - Corporate Stock</b>	<b>VALUATION METHOD</b>	<b>BOOK VALUE</b>
ABAXIS INC	Market Value	288,193
ADVISORY BRD CO	Market Value	103,246
ANSYS INC	Market Value	359,475
APTARGROUP INC	Market Value	206,548
BLACKBAUD INC	Market Value	116,773
BROWN & BROWN INC	Market Value	284,181
CABOT MICROELECTRONICS CORP	Market Value	79,013
CARBO CERAMICS INC	Market Value	53,251
COHEN & STEERS INC	Market Value	395,416
COMPUTER PROGRAMS & SYS INC	Market Value	284,212
COPART INC	Market Value	321,615
EXONENT INC	Market Value	306,203
FACTSET RESEARCH SYSTEMS INC	Market Value	186,159
FEDERATED INVS INC PA CL B	Market Value	285,427
HAEMONETICS CORP MASS	Market Value	326,603
HENRY JACK & ASSOC INC	Market Value	376,026
HITTITE MICROWAVE CORP	Market Value	351,399
LANDSTAR SYSTEMS INC	Market Value	224,775
LINCOLN ELEC HLDGS INC	Market Value	178,619
OWENS AND MINOR INC HLDGS CO INC	Market Value	370,991
POOL CORP	Market Value	429,685
RBC BEARINGS INC	Market Value	164,131
RLI CORP	Market Value	226,697
ROLLINS INC	Market Value	131,245
STEINER LEISURE LTD	Market Value	218,638
TECHNE CORP COM	Market Value	394,002
TORO CO	Market Value	151,271
ACTIVISION BLIZZARD INC	Market Value	292,496
ADOBE SYS INC	Market Value	331,307
APACHE CORP	Market Value	346,726
BROADCOM CORP CL A	Market Value	307,216
CISCO SYSTEMS INC	Market Value	290,173
CME GROUP INC	Market Value	206,981
COMCAST CORP CL A	Market Value	371,332
DELL INC	Market Value	258,819
DEVON ENERGY CORP NEW	Market Value	210,504
EBAY INC	Market Value	351,540
ENERGIZER HLDGS INC	Market Value	217,774
EOG RES INC	Market Value	280,693
FEDEX CORP	Market Value	250,095
FORD MOTOR CO	Market Value	283,432
GILEAD SCIENCES INC	Market Value	368,652
HALLIBURTON CO	Market Value	290,288
HARRIS CORP DEL	Market Value	328,313
INTUIT INCORPORATED	Market Value	309,214

**SCHEDULE OF ASSETS (Continued)**  
**FORM 990PF (2011) MAX H. GLUCK FOUNDATION, INC.**  
**Part II Balance sheets**

**FEIN 95-3979100**

<b>Line 10b Investments - Corporate Stock</b>	<b>VALUATION METHOD</b>	<b>BOOK VALUE</b>
MERCK & CO INC NEW	Market Value	342,225
POTASH CORP OF SASKATCHEWAN INC	Market Value	205,211
RYDER SYS INC	Market Value	183,651
SCHWAB CHARLES CORP NEW	Market Value	300,235
TEVA PHARMACEUTICAL INDUSTRIES LTD	Market Value	317,571
UNITEDHEALTH GROUP INC	Market Value	341,933
YAMANA GOLD INC	Market Value	363,154
YUM BRANDS INC	Market Value	171,357
ABB LTD SPONSORED ADR	Market Value	589,854
ABBOTT LABS	Market Value	426,018
ALTRIA GROUP INC	Market Value	632,127
ASTRAZENECA PLC SPONSORED ADR	Market Value	564,298
BASF SE SPONS ADR	Market Value	237,476
BEMIS CO INC	Market Value	425,942
CA INC	Market Value	615,187
CHEVRON CORP NEW	Market Value	311,120
CHINA MOBILE LTD SPON ADR S A	Market Value	250,443
CONAGRA FOODS INC	Market Value	240,864
DIAGEO PLC SPONSORED ADR NEW	Market Value	257,675
ECOPETROL S A SPONSORED ADS	Market Value	283,078
ELI LILLY & CO	Market Value	322,941
EMERSON ELEC CO	Market Value	229,733
GENUINE PARTS CO	Market Value	378,250
GLAXOSMITHKLINE PLC SPONS ADR	Market Value	607,175
HASBRO INC	Market Value	344,153
INTEL CORP	Market Value	244,754
KIMBERLY CLARK CORP	Market Value	498,850
LORILLARD INC	Market Value	395,058
MATTEL INC	Market Value	370,173
PETROCHINA CO LTD SPONS ADR	Market Value	233,614
PG & E CORP	Market Value	243,055
PPL CORP	Market Value	238,165
SANOFI SPONS ADR	Market Value	436,246
SIEMENS A G SPONSORED ADR	Market Value	545,530
STATOIL ASA SPONSORED ADR	Market Value	243,396
SYSCO CORP	Market Value	243,369
TELEFONICA S A ADR SPONS ADR	Market Value	10,428
THOMSON REUTERS CORP	Market Value	431,476
TOTAL S A SPONSORED ADR	Market Value	571,494
VALE SA ADR REPSTG PFD	Market Value	644,825
<b>TOTAL</b>		<b>33,983,744</b>

**SCHEDULE OF ASSETS****FORM 990PF (2011) MAX H. GLUCK FOUNDATION, INC.****FEIN 95-3979100****Part II Balance sheets**

<b>Line 10a Investments - US Government Obligations</b>	<b>VALUATION METHOD</b>	<b>BOOK VALUE</b>
UNITED STATES TREAS BDS 7 500% 11/15/16 B/E DTD 11/15/86	Market Value	2,625,683
UNITED STATES TREAS NTS 1 375% 09/30/18 B/E DTD 09/30/11	Market Value	389,025
UNITED STATES TREAS NTS 3 375% 11/15/19 B/E DTD 11/15/09	Market Value	786,726
UNITED STATES TREAS INFLATION INDEXED NTS 1 625% 1/15/18	Market Value	1,140,217
FED FARM CR BKS CONS BOND 0 460% 10/24/14 CLB	Market Value	220,020
FED FARM CR BKS CONS BOND 0 570% 10/02/14 CLB	Market Value	175,005
FED FARM CR BKS CONS BDS 0 690% 10/30/15 CLB	Market Value	225,079
FED FARM CR BKS CONS BDS 1 540% 06/11/18 CLB	Market Value	395,087
FED FARM CR BKS CONS BDS 2 130% 01/30/20 CLB	Market Value	70,085
FED FARM CR BKS CONS BDS 2 150% 02/14/20 CLB	Market Value	175,019
FED FARM CR BKS CONS BDS 2 750% 05/01/23 CLB	Market Value	39,947
FED FARM CR BKS CONS BDS 2 900% 08/07/23 CLB	Market Value	350,046
FED HOME LN BKS 4 125% 03/13/20	Market Value	177,151
FED HOME LN MTG CORP MED TERM NTS 1 500% 7/13/15CLB	Market Value	110,033
FNMA MEDIUM TERM NTS 1 125% 12/17/13 CLB	Market Value	30,052
FNMA MEDIUM TERM NTS STEP UP 0 50% 8/15/16 CLB	Market Value	180,232
FNMA MEDIUM TERM NTS STEP UP 0 50% 10/23/15 CLB	Market Value	70,018
FNMA MEDIUM TERM NTS STEP UP 1 00% 09/14/16 CLB	Market Value	165,280
UNITED STATES TREAS BDS TIPS 2 375% 1/15/25	Market Value	787,524
UNITED STATES TREAS NTS TIPS E-A-2019 2 125% 01/15/19	Market Value	384,587
UNITED STATES TREAS NTS TIPS 1 125% 1/15/21	Market Value	786,597
UNITED STATES TREAS NTS TIPS 1 250% 07/15/20	Market Value	391,913
<b>Total United States Government Obligations</b>		<b>9,675,326</b>