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Form 990-PF

Return of Private Foundation

OMB No 1545-0052

	Depa	tment	of the Treasury	Treated as a Private be able to use a copy of this	e Founda	ition	ortina requiremente	2011	
			enue Service Note. The foundation may dar year 2011 or tax year beginning NOV		, and e		OCT 31, 2012		
			foundation	1, 2011	, and c	y	A Employer identification n	umber	
			MORTON A. & PHYLLIS SI		ON		22-3010423	· ···	
	_		nd street (or P O box number if mail is not delivered to street	address)		Room/suite	B Telephone number		
	_3		HESTNUT DRIVE				845-354-109		
	-		wn, state, and ZIP code				C If exemption application is pen	ding, check here	
			ONA, NY 10970			h t -		skadakan N	
	G	neck	all that apply: Initial return	Initial return of a fo	rmer public c	narity	D 1. Foreign organizations, check here		
			Final return Address change	Amended return			Foreign organizations meeti 2. check here and attach com	ing the 85% test,	
	<u></u>	hack	type of organization: X Section 501(c)(3) ex	Name change			1		
		_	· · ·	Other taxable private founda	tion		E If private foundation status under section 507(b)(1)(A)		
	L Fa		rket value of all assets at end of year J Account	<u> </u>	X Accr	uat	7		
			· —	ther (specify)	71001		F If the foundation is in a 60 under section 507(b)(1)(E		
	,		28,619. (Part I, colu	mn (d) must be on cash b	asis)			,, shock nord	
	_	rt I	Analysis of Revenue and Expenses	(a) Revenue and		vestment	(c) Adjusted net	(d) Disbursements	
ଚ			The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	expenses per books	inco		income	for charitable purposes (cash basis only)	
2013		1	Contributions, gifts, grants, etc., received	10,000.			N/A		
9		2	Check X if the foundation is not required to attach Sch. B						
~		3	Interest on savings and temporary cash investments	116.		116.	S	TATEMENT 1	
		4	Dividends and interest from securities			<u></u> .		_	
O AUG		5a	Gross rents						
		b	Net rental income or (loss)						
<u>u</u>	Revenue	6a	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all						
2			assets on line 6a			0.		· · · · · · · · · · · · · · · · · · ·	
SCANNED		-	Capital gain net income (from Part IV, line 2)						
S			Net short-term capital gain Income modifications						
			Gross sales less returns and allowances						
		_	Less Cost of goods sold						
			Gross profit or (loss)						
		11	Other income						
		12	Total. Add lines 1 through 11	10,116.		116			
		13	Compensation of officers, directors, trustees, etc	0.		0.		0.	
		14	Other employee salaries and wages						
	Ø	15	Pension plans employee penetits						
	nse		Accounting fees 2015TMTD 2	1 600		050		1 250	
	and Administrative Expenses	b	1601 AUC 18 AUS 17 17	1,600.		250	<u> </u>	1,350.	
	Ú) O		Other professional fees See						
	aţį		Taxes OGDEN III				<u> </u>		
	istri		Depreciation and depletion			•			
	nin.		Occupancy						
	Adr		Travel, conferences, and meetings						
	pu		Printing and publications						
	g		Other expenses STMT 3	189.		0.		189.	
	ati	24	Total operating and administrative						
	Operating		expenses. Add lines 13 through 23	1,789.		250		1,539. 7,273.	
	O		Contributions, gifts, grants paid	7,273.				<u>7,273.</u>	
			Total expenses and disbursements.	0.000		0.5.6		0.010	
			Add lines 24 and 25	9,062.		250	•	8,812.	
			Subtract line 26 from line 12:	1 054					
			Excess of revenue over expenses and disbursements Net investment income (if negative, enter -0-)	1,054.		0			
			Adjusted net income (if negative, enter -0-)			<u> </u>	N/A		
		_							

		10-PF (2011) THE MORTON A. & PHYLLIS	SIMON FOUNDA		3010423 Page 2
F	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year (a) Book Value	End o	f year (c) Fair Market Value
-	T 1	Cash - non-interest-bearing	6,987.		924.
		Savings and temporary cash investments	20,578.	27,695.	27,695.
	1	Accounts receivable	20,370.	21,095.	27,093.
	"	Less; allowance for doubtful accounts			
	4	Pledges receivable ► Less: allowance for doubtful accounts ►			
	_ ا				
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
	l _	disqualified persons			
	7	Other notes and loans receivable			
		Less: allowance for doubtful accounts			
Assets	1	Inventories for sale or use	<u> </u>	-	
SS		Prepaid expenses and deferred charges			
•	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock	<u>,</u>		
	C	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment: basis ▶			
		Less accumulated depreciation			
	15	Other assets (describe ►			
	İ		*		-
	16	Total assets (to be completed by all filers)	27,565.	28,619.	28,619.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
ģ	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons	7		
ā	21	Mortgages and other notes payable	**		
Ë		Other liabilities (describe >)			
		, , , , , , , , , , , , , , , , , , , ,			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
		and complete lines 24 through 26 and lines 30 and 31.			
es	24	Unrestricted			
ä	25	Temporarily restricted	***		
Bal	l .	Permanently restricted			
힏		Foundations that do not follow SFAS 117, check here			
Ξ		and complete lines 27 through 31.			
Net Assets or Fund Balances	27	Capital stock, trust principal, or current funds	0.	0.	
ets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Ass	29	Retained earnings, accumulated income, endowment, or other funds	27,565.	28,619.	
et.	30	Total net assets or fund balances	27,565.		
Z	30	Total net assets of fund parances	41,303.	28,619.	
	31	Total liabilities and net assets/fund balances	27,565.	28,619.	
_			-	20,019.	
P	art	Analysis of Changes in Net Assets or Fund Ba	alances		
1	Total	net assets or fund balances at beginning of year - Part II, column (a), line 3	30	·	 -
		t agree with end-of-year figure reported on prior year's return)			27,565.
		amount from Part I, line 27a		2	1,054.
		increases not included in line 2 (itemize)			1,054.
		ines 1, 2, and 3		3	
		eases not included in line 2 (itemize)		4	28,619.
		net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	lumn (h) line 20	5	<u>0.</u> 28,619.
<u> </u>	. otul	The course of tono buildings at one of year time 4 minus line 3) - Falt II, CO	iumi (D), iiiio 30		Form 990-PF (2011)
122	644				101111 220-F.E (2011)

-		MORTON A. & PHY			UNDA	TION	22-	-3010	0423	Page 3
۰	(a) List and describe	e the kınd(s) of property sold (e.q house; or common stock, 200 sh	g., real estate,		(b) Ho	ow acquired Purchase Donation	(c) Date acq (mo., day,	quired yr.)	(d) Date (mo., da	
18	a		-,			·	_			
_t	NON!	<u> </u>			<u> </u>				_	
	<u>c </u>				-					_
_	<u>d</u>				 					-
	(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale			(h) Gain (e) plus (f	or (loss)) minus (g)	
	a									
_t	b									
_	<u>c</u>		-			.,			_	
_	d			.,						
_	Complete only for assets showing (gain in column (h) and owned by	the foundation	on 12/31/69			(I) Gains (Col.	(h) nam i	minile	
_	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Ex	cess of col. (1)			ol. (k), but not Losses (fro	less than	-0-) or	
_ 8	a									
_	b									
_	<u>c</u>		 	 .		· .			_	
_	<u>d</u>		 							
_6	<u> </u>	C If goin also ente	r in Port I line	7	1		··· <u>··</u>		•	
2	Capital gain net income or (net capit	(al loss) If gain, also enter the loss) also enter the loss of the	or meart i, illie Or in Part I, line	<i>1</i> 7	 	2				
3	Net short-term capital gain or (loss) If gain, also enter in Part I, line 8, co	as defined in sections 1222(5) a			}					
	If (loss), enter -0- in Part I, line 8 Part V Qualification Unit	der Section 4940(e) fo	r Dodugod	Toy on No	<u> </u>	3	00000		_	
_	or optional use by domestic private for						COITIE			
lf	section 4940(d)(2) applies, leave this	part blank.				,				[===]
	as the foundation liable for the section			•	eriod?				Yes	X No
	"Yes," the foundation does not qualify Enter the appropriate amount in each				ries					
÷	(a) Base period years	(b)	TOCKONS DOTOLO	making any one	(c)				(d) ution ratio	
	Base periód years Calendar year (or tax year beginning	برام محدد کیا میں مار میں مار م	stributions	Net value of n		able-use asset	s (co	Distribi ol. (b) divi	ùtion ratio ded by col.	(c))
_	2010		0.				0.			00000
	2009	1	L1,098.			36,85				01159
_	2008		8,094.			46,23				75066
_	2007		L4,456.			57,28				52357
_	2006		3,091.			64,47	4.		. 0	47942
	Total of line 1, column (d) Average distribution ratio for the 5-y	year hase period - divide the total	on line 2 by 5	or by the numbe	or of yea	re	2		.7	76524
J	the foundation has been in existence	*	on line 2 by 3,	or by the number	n oi yea	15	3		.1	55305
4	Enter the net value of noncharitable-	use assets for 2011 from Part X,	, line 5				4		27	,671.
5	Multiply line 4 by line 3						5		4	,297.
6	Enter 1% of net investment income	(1% of Part I, line 27b)					6			0.
7	Add lines 5 and 6						7		4	,297.
8	Enter qualifying distributions from P	art XII, line 4					8		8	,812
	If line 8 is equal to or greater than lin See the Part VI instructions.	ne 7, check the box in Part VI, line	e 1b, and comp	lete that part us	ing a 1%	tax rate.				

	n 990-PF (2011) THE MORTON A. & PHYLLIS SIMON art VI Excise Tax Based on Investment Income (Section 4940	FOUNDATI (a), 4940(b),			3010 - see ii			age 4 1 S)
1a	Exempt operating foundations described in section 4940(d)(2), check here 🕨 🔲 and en	iter "N/A" on line 1.)					
	Date of ruling or determination letter: (attach copy of letter if nece		tions)					
b	b Domestic foundations that meet the section 4940(e) requirements in Part V, check here X and enter 1%							0.
	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, o	ol. (b). 📗					
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Other	hers enter -0-)		2				0.
3	Add lines 1 and 2			3				0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Ot	thers enter -0-)		4				<u>0.</u>
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			5				<u>0.</u>
6	Credits/Payments:							
а	2011 estimated tax payments and 2010 overpayment credited to 2011	6a		ŀ				
b	Exempt foreign organizations - tax withheld at source	6b						
C	: Tax paid with application for extension of time to file (Form 8868)	6c		ļ				
d	Backup withholding erroneously withheld	6d						
	Total credits and payments. Add lines 6a through 6d			7				0.
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attack	ched		8				
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		>	9				0.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		, >	10				
	Enter the amount of line 10 to be: Credited to 2012 estimated tax		Refunded >	11				
	art VII-A Statements Regarding Activities							<u> </u>
1a	f a During the tax year, did the foundation attempt to influence any national, state, or local legisle	lation or did it parti	cipate or intervene	ın			Yes	
	any political campaign?					1a_		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purpos					1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and	d copies of any n	naterials publishe	ed or				
	distributed by the foundation in connection with the activities							
	c Did the foundation file Form 1120-POL for this year?					1c		<u> </u>
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the		•					
	(1) On the foundation. > \$ (2) On foundation managers.		0.					
е	Enter the reimbursement (if any) paid by the foundation during the year for political expendit	ture tax imposed o	n foundation					
_	managers. ▶ \$ 0.							37
2	Has the foundation engaged in any activities that have not previously been reported to the IR	157				2		X
_	If "Yes," attach a detailed description of the activities.							
3	Has the foundation made any changes, not previously reported to the IRS, in its governing in		or incorporation, c	or				v
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the change					3	-	X
	a Did the foundation have unrelated business gross income of \$1,000 or more during the year	,		N	r / ⁊	4a		
	b If "Yes," has it filed a tax return on Form 990-T for this year? Wes there a liquidation termination discolution or substantial contraction during the year?			1	I/A	4b 5		Х
Ð	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.					3		
_	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied eit	ther:						
O	By language in the governing instrument, or	uici.						
	 By state legislation that effectively amends the governing instrument so that no mandatory 	v directions that co	nflict with the state	a law				
	remain in the governing instrument?	y directions that co	innot with the state	· iuvv		6	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year?					7	X	
•	If "Yes," complete Part II, col. (c), and Part XV.					<u> </u>		-
82	a Enter the states to which the foundation reports or with which it is registered (see instruction	ns) ►						
Ja	NY							
h	b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the At	ttornev General (or	designate)					
of each state as required by General Instruction G? If "No," attach explanation					8b	х		
9		ction 4942(i)(3) or	4942(ı)(5) for cale	endar				
_	year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," co					9		Х
10	Did any persons become substantial contributors during the tax year? if "Yes," attach a schedul	=				10		Х

11 All any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If Year, attach schedule (see instructions) 12 Did the foundation make a distribution in a donor advised fund over which the foundation or a disqualified person had advisory privileges? 13 If Year, attach statement (see instructions) 14 If Year, attach statement (see instructions) 15 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 16 Without address ► N/A 17 The blooks are in car or ► MORTON A. SIMON 17 Telephone no. ►845-354-1094 18 Located at ►3 CHESTNUT DR., POMONA, NY 18 Section 4847(6)(1) nonexempt charable trusts limit growing private and water the amount of tax-exempt interest received or accrued during the year 18 All any time during claineds year 2011, did the foundation have an interest in or a signature or other authority over a bank, 18 All any time during claineds year 2011, did the foundation have an interest in or a signature or other fundancial account in a foreign country? 19 Early III Sittlements 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. 10 Jump tile year did the foundation (either directly or indirectly): 11 Engage in the sist or exchange, or insempt of preceivery with a disqualified person? 12 Grown money from, lend money to, or otherwise sedend credit to (or accept it from) a disqualified person? 13 Furnish goods, services, or societies to or accept them from) a disqualified person? 14 Fay and the side exchange, or insempt of preceivery with a disqualified person? 15 Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 16 Form 4720 if any item columns are preceived and several credit to (or accept it from) as disqualified person? 17 Form series any income or assets to a desqualided person? 18 Form 4720 if any item as a column and		990-PF (2011) THE MORTON A. & PHYLLIS SIMON FOUNDATION 22-303	L0423		Page 5
section 512(b)(13)? If If Yes, attach schodule (see instructions) 10 diff betomakton make a distribution to a doring advised fund over which the foundation or a designalized person had adverory privileges? If Yes, attach statement (see instructions) 10 diff betomakton comply with the public inspection requirements for its annual returns and exemption application? Website address > N/A 11 The books are in care of MCRTON A. SIMON 12 P-4 > 10970 15 Section 497(g)(1) nonexempt charitable trusts fring form 990-PF in lieu of form 1041 - Check here and writer the amount of flax-exempt interest received or accrued during the year 16 At lary time during calendar year 2011, do the foundation have an interest in or a signature or other authority over a bank, securities, or other financial accruit in a foreign country? 16 Section 497(g)(1) nonexempt charitable trusts fring form 990-PF in lieu of form 1041 - Check here and writer the mannual control of the completion in a foreign country? 16 At lary time during calendar year 2011, do the foundation have an interest in or a signature or other authority over a bank, securities, or other financial accruit in a foreign country? 16 Section 497(g)(1) more securities, or other financial accruiting a country of the instructions for exceptions and fining requirements for form TD F 90-221. If If Yes, and the foreign country of the instructions of exceptions and fining requirements for form TD F 90-221. If If Yes, and the foreign country of the instructions of exceptions and fining requirements for form TD F 90-221. If Yes, and the foreign form 1041 in Yes in Ye			-		
12 Dot the foundation make a distribution to a dinor advised fund over which the foundation or a disqualified person had advisory privileges? 13 Dot the foundation comply with the public inspection requirements for its annual returns and exemption application? 14 The blooks are in care of ▶ MORTON A. SIMON Telephone no. ▶ 845-354-1094 15 Section 4987((1) moseximptic fundation from 190-PF in less of form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year 16 A larly time during clained year 2011, did the foundation have an interest in or a segnature or other authority over a bank, securities, or other financial account in a foreign country? 18 N/A 19 Pert VII-B Statements Regarding Activities for Which Form 4720 May Be Required FILE Form 4720 if any them is checked in the "Yes" column, unless an exception applies. 19 Pert VII-B Statements Regarding Activities for Which Form 4720 May Be Required FILE Form 4720 if any them is checked in the "Yes" column, unless an exception applies. 10 Uring the year did the foundation (either diesetily or indirectily: 11 Chapter in the safe or exchange, or lessing of property with a disqualified person? 12 Urinsh goods, services, or facilities to (or accept them from) a disqualified person? 13 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 14 Person personation to, or ayor inemburs the expenses of, a disqualified person? 15 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 16 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 17 Yes X No 18 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 18 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 19 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 10 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 10 Fur			11		x
If Yes, attach statement (see instructions) Did the foundation comply with the public inspection requirements for as annual returns and exemption application? Website address ▶ N/A 11 The books are in care of ▶ MORTON A. SIMON Societion 4947(a)(1) nonexempt charitable trusts thing form 950-PF in leve of form 1041 - Check here and enter the amount of tax-eventy interest received or accrued during the year and enter the amount of tax-eventy interest received or accrued during the year and enter the amount of tax-eventy interest received or accrued during the year 16 All any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or order financial account in a foreign country? See the instructions for exceptions and filing requirements for Form 10 F 90-22.1, if Yes,* enter the name of the foreign country? Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 Set of the instructions of exceptions and filing requirements for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 Set of the instructions of exceptions (either directly or addressly): (1) Engage in the sale or exchange, or lessing of property with a disqualited person? (2) Berrow money from, lend money to, or otherwise excend cred to (or accept it from) a disqualited person? (3) Furnarish goods, services, or facilities to (or accept them from) a disqualited person? (4) Pay compensation to, or pay or remburse the expenses of, a disqualitied person? (5) Furnarish rary income or assets to a disqualitied person (or make any of either available for the benefit or use of all signalitied person? (6) Transfer any income or assets to a disqualitied person (or make any of either available for the benefit or use of all signalitied person? (7) Furnarish rary in come or assets to a disqualit	12	· · · · · · · · · · · · · · · · · · ·			
13 X		· · · · · · · · · · · · · · · · · · ·	12		х
Website address ► N/A If he books are in case of ▶ MORTON A. SIMON Located at ► 3 CHESTNUT DR., POMONA, NY 15 Section 4847(a)(1) onexempt charitable trusts fining form \$30-9F in lieu of Form 1041 - Chack here and enter the anount of tax-exempt interest received or accrued during the year and enter the anount of tax-exempt interest received or accrued during the year 16. At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and fling requirements for Form TD F 90-22.1. If Yes,* enter the name of the foreign country Part VIII-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. 1 During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of properly with a disqualified person? (2) Borrow money from, lend money for, or otherwise extend credit to (or accept it from) a disqualited person? (3) Furnish poods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation for, or pay or remitivise the expenses of, a disqualified person? (5) Transfer any income or assists to a disqualified person (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available or service) or a current notice regarding disaster assistance (see instructions) (6) Hayare to pay morey or a scatts to a disqualified person) (or make any of either available or the benefit or use of a disqualified person) (or make any of either available or the benefit or use of a disqualified person) (or search and yearch and yearch and yearch and yearch and yearch and yearch and ye	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	1	X	
Located at M 3 CHESTRUT DR POMONA NY 1 Section 4947(a)(1) nonexempt charactels trusts filing form 990-PF in Neu of Form 1041 - Check here and enter the amount of tax-exempt intenst received or accrued during the year 16. At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial accounting of other financial accounting of the instructions for exceptions and filing requirements for Form 10F 90-22.1. If Yes, enter the name of the foreign country. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 Juming the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburs the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person in 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.) 10) If any answer is "Yes" to 14(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.494(14)-30 or in a current notice regarding disaster assistance cleen here 10) Did the foundation engage in a prior year in any of the acts discribed in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011? 10) The expension of the prior year any of the acts discribed in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011? 10) The expension of section 4942(2)(2) are being applied to any of the years listed in					
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15 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 filling requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): 15 Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay complemation to, or pay or reimburse the expenses of, a disqualified person? (5) Irransfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a powriment official? (Exception, Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b If any answer is "Yes" to 14(1-6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(g/3) or na current notice regarding disaster assistance (see instructions)? N/A Organizations relying on a current notice regarding disaster assistance (see instructions)? N/A 1b D 1c Taxes on failure to distribute ancemal (section 4942 (a)(2)) (relating to incorrect valuation of assets) to the lax year beginning in 2011 as a result of (i) any purchase of the foundation was a private operating foundation defined in section 4942((a)(2)) relating to distribute ancome (section 4942 (a)(2)) (relating to incorrect valuation of assets) to the year's undestributed income? (if appl	15			>	
Securities, or other financeal account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No A 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 remibures the expenses of, a disqualified person? Yes No 5) Transfer any income or assets to a disqualified person (or make any of either available to 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 graint to or to employ the official for a period after termination of government service, if terminaling within 90 days.) Yes No b If any answer is Yes' to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.491(d)-3 or in a current notice regarding disaster assistance (see instructions)? N/A 70 Organizations relying on a current notice regarding disaster assistance (see instructions)? N/A 80 Are there any years issted in 2a for which the foundation have any undistributed income (times 6d and 6e, Part XIII) for tax year(s) beginning before 2011? 1 Yes No Yes No 1 If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years listed, answer "No" and attach statement - see instructions.) 1 If Yes, "I the tayee ascess business holdings in 2011 as a result of (1) any p		and enter the amount of tax-exempt interest received or accrued during the year			
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for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b If any answer is 'Yes' to 1a(1)-(6), 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)? 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? 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If 'Yes,' list the years A the end of tax year's undistributed income? (If applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.) N/A 2b If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. A 2b 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 accurred by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.) N/A a Did the foundation make any investment in a prior year (but after December 31, 1969) that could					
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had not been removed from jeopardy before the first day of the tax year beginning in 2011? 4b X			48		
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orm 990-PF (2011) THE MORTON A. & PHYLLIS			<u> 22-30104</u>	<u> 43</u>	Page 6
Part VII-B Statements Regarding Activities for Which	rorm 4/20 May Be F	sequired (continu	ued)		
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))?					
(2) Influence the outcome of any specific public election (see section 4955); of	or to carry on, directly or indire				
any voter registration drive?			s X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes		Ye	s X No		
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section				
509(a)(1), (2), or (3), or section 4940(d)(2)?			s X No	1	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	, or educational purposes, or f				
the prevention of cruelty to children or animals?		Ye	s X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	der the exceptions described i	n Regulations			
section 53.4945 or in a current notice regarding disaster assistance (see instru	uctions)?		N/A	5b	
Organizations relying on a current notice regarding disaster assistance check t	nere				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f		ined			
expenditure responsibility for the grant?		I/A □ Ye	s No		
If "Yes," attach the statement required by Regulations section 53 494					
6a Did the foundation, during the year, receive any funds, directly or indirectly, to					
a personal benefit contract?	1 A Grant or and and	Ye	s X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a	personal benefit contract?		· — ·	6Ь	x
If "Yes" to 6b. file Form 8870	S. S		<u> </u>	_	
7a At any time during the tax year, was the foundation a party to a prohibited tax:	shelter transaction?	□ va	es X No		
b If "Yes," did the foundation receive any proceeds or have any net income attrib				7b	
Information About Officers Directors Truck		nagers Highly		· • 1	
Part VIII Paid Employees, and Contractors	, i suituutioti Ma		•		
List all officers, directors, trustees, foundation managers and their	compensation.				
	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e)	Expense unt, other
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation	acco allo	unt, other owances
MORTON A. SIMON	PRESIDENT	enter -0-7	сопреизавоп	unc	777411003
3 CHESTNUT DR.	T LEGITORNI				
	1.00	0.	0.		0.
POMONA, NY 10970 PHYLLIS B. SIMON	V.P, SEC		<u> </u>		
	V.P, SEC				
3 CHESTNUT DR.	2 00	0.	0.		0
POMONA, NY 10970	2.00	· ·	0.	1	0.
	-				
	4				
	4				
	_{				
	alread on the state of the state of	1 THOMAS INCOME.			
2 Compensation of five highest-paid employees (other than those in		enter "NUNE."	(d) Contributions to	(6)	Fynense
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans and deferred	acco	Expense unt, other
	devoted to position		compensation	alle	owances
NONE	4				
				ļ	
				<u> </u>	
	<u></u>				
Total number of other employees paid over \$50,000					0

Form 990-PF (2011) THE MORTON A. & PHYLLIS SIMON FOUNDATION 22	-30104	23 Page 7
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	E	xpenses
number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	 	·
1 N/A	\dashv	
	-	
2		
	7	
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.	T #	Amount
1 N/A		
2		
	_	
All other program-related investments. See instructions.		
3	\dashv	
	\dashv	
Total. Add lines 1 through 3	.	0.

P	art X. Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations, se	e instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	0.
	Average of monthly cash balances	1b	<u>28,092.</u>
	Fair market value of all other assets	1c	
đ	Total (add lines 1a, b, and c)	1d	28,092.
	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	28,092.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	421.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	27,671.
6	Minimum investment return. Enter 5% of line 5	6	1,384.
Р	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	nd certain	
1	Minimum investment return from Part X, line 6	1	1,384.
2a	Tax on investment income for 2011 from Part VI, line 5		
b	Income tax for 2011. (This does not include the tax from Part VI.)	1	
C	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,384.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,384.
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	1,384.
P	art XII Qualifying Distributions (see instructions)	1	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		0 010
a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	8,812.
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	8,812.
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	0.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	8,812.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 4940(e) reduction of tax in those years.	qualifies for th	e section

Form **990-PF** (2011)

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,			22.72	
line 7				1,384.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			0.	
b Total for prior years:				<u> </u>
,,		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006 3,091.				
b From 2007 11,592.				
c From 2008 5,788.				
d From 2009 9,255.				
e From 2010				
f Total of lines 3a through e	29,726.			
4 Qualifying distributions for 2011 from				
Part XII, line 4: ► \$ 8,812.			_	
a Applied to 2010, but not more than line 2a			0.	
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.			4 004
d Applied to 2011 distributable amount	T 400		·	1,384.
e Remaining amount distributed out of corpus	7,428.		······································	
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:				
& Corpus Add lines 3f, 4c, and 4e Subtract line 5	37,154.			
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	2 001			
not applied on line 5 or line 7	3,091.			*****
9 Excess distributions carryover to 2012.	24 062			
Subtract lines 7 and 8 from line 6a	34,063.			
Analysis of line 9: a Excess from 200711,592.				
a Excess from 2007 b Excess from 2008 5,788.				
c Excess from 2009 9, 255.				
d Excess from 2010		-		
e Excess from 2011 7,428.				
7,420 •				5 000 PF (00.11)

Part XIV Private Operating Form	TON A. & PH				010423 Page II
_			I-A, question 9)	N/A	
1 a If the foundation has received a ruling of		, , ,			
foundation, and the ruling is effective for			· ▶└─	7 40 40 () (0)	10.40(.)(5)
b Check box to indicate whether the found		g toundation described		4942(j)(3) or 4	1942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year (a) 2011	(b) 2010	Prior 3 years (c) 2009	(d) 2008	(e) Total
income from Part I or the minimum	(a) 2011	(0) 2010	(6) 2003	(0) 2000	(6) 10(a)
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					
 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				İ	
. . ,		_			
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					<u> </u>
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 Info	rmation (Comple	te this part only	if the foundation	on had \$5,000 or m	ore in assets
at any time during t	he year-see instr	uctions.)			
1 Information Regarding Foundation	n Managers:	-			
a List any managers of the foundation wh	o have contributed more t	han 2% of the total con	tributions received by	the foundation before the cl	ose of any tax
year (but only if they have contributed n	nore than \$5,000). (See se	ection 507(d)(2).)			
NONE		· <u> </u>			
b List any managers of the foundation wh			(or an equally large po	rtion of the ownership of a	partnership or
other entity) of which the foundation has	s a 10% or greater interes	l.			
NONE	_			· · · · · · · · · · · · · · · · · · ·	
2 Information Regarding Contributi					
Check here X if the foundation of the foundation makes gifts, grants, etc.	-	•	-		
	·			, complete items 2a, b, c, ai	
a The name, address, and telephone num	per of the person to whoh	n applications should be	addressed.		
b The form in which applications should be	e submitted and informat	ion and materials they s	hould include;		
c Any submission deadlines:					
			 		
d Any restrictions or limitations on awards	s, such as by geographica	I areas, charitable fields	, kinds of institutions,	or other factors:	

Form 990-PF (2011) THE MORTON Part XV Supplementary Informati	A. & PHYLLIS SIN	MON FOUNDA	TION 22-301	0423 Page 11
3 Grants and Contributions Paid During the		Payment		=
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
a Paid during the year				
SEE STATEMENT ATTACHED	none	NON-PROFIT	CHARITABLE	7,273
Total		<u> </u>	▶ 3a	7,273
b Approved for future payment				
NONE				
Total			▶ 26.	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income		ded by section 512, 513, or 514	(e)
_	(a) Business	(b) Amount	(c) Exclu- sion	(d) Amount	Related or exempt function income
1 Program service revenue:	code	741100114	code	Alliount	- Idinction income
a	<u> </u>		ļ		
b	<u></u>		ļ		
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments			14	116.	
4 Dividends and interest from securities		_			<u>-</u>
5 Net rental income or (loss) from real estate:					
	-		 		
a Debt-financed property	<u> </u>				
b Not debt-financed property				,	
6 Net rental income or (loss) from personal					
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other					
than inventory					
9 Net income or (loss) from special events			L		
10 Gross profit or (loss) from sales of inventory			l.,		
11 Other revenue:					
a					
b					
С					
d					
<u> </u>					
12 Subtotal. Add columns (b), (d), and (e)		0.	†	116	0.
13 Total Add line 12, columns (b), (d), and (e)		0.			116.
(See worksheet in line 13 instructions to verify calculations.)				10	110.
					·
Part XVI-B Relationship of Activities to	the Acc	omplishment of Ex	emp	t Purposes	
Line No. Explain below how each activity for which incom			contrib	outed importantly to the accor	nplishment of
the foundation's exempt purposes (other than be				<u></u>	
3 THE FOUNDATION EARNED I	NTERES	T INCOME ON	SAV	ING A/C'S	
					· · · · · · · · · · · · · · · · · · ·
		· · · · · · · · · · · · · · · · · · ·			
-				·····	
		· · · · · · · · · · · · · · · · · · ·			
		118.			

123622 12-02-11

14

FORM 990-PF INTEREST ON SAVI	NGS AND TEM	PORARY CASH I	NVESTMENTS	STATEMENT	1
SOURCE				AMOUNT	
HUDSON BANK			-	11	6.
TOTAL TO FORM 990-PF, PART I,	LINE 3, CO	LUMN A	=	11	6.
FORM 990-PF	ACCOUNTI	NG FEES		STATEMENT	2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM		
ACCOUNTING FEES	1,600.	250.		1,35	0.
TO FORM 990-PF, PG 1, LN 16B	1,600.	250.		1,35	0.
FORM 990-PF	OTHER E	XPENSES		STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM		
POSTAGE NY LAW JOURNAL AD FILING FEES	139. 25. 25.	0.			9. 5. 5.
TO FORM 990-PF, PG 1, LN 23	189.	0.		18	9.

The Marton & Phyllis Simon Foundation	
ID # 22-3010423	
31-04-12	•

31-04-17					
Матъ	Address	Foundation Status of Receipients	Purpose of Grant Contribution	₹	Amount
American Society For Yad Vashem, Inc.	PO 80x 170305 Milwaukee, WI 52317-9962	501(c)3	Chantable	s	15 00
Temple Bethel	415 Viola Road Spring Valley, NY 10977	501(c)3	Chantable	s	283.75
Temple Bethel	416 Viola Road Spring Valley, NY 10977	501(c)3	Chantable	s	283.75
National Yiddish BookCenter	1021 West Street Amherst, MA 01002-3375	501(c)3	Chantable	s	36 00
Blinded Veterans Association	477 H Street, PO Box 98081, Washington, DC 20090-8081	501(c)3	Charitable	•	10 00
Alzheimers Assn	Hudson Valley/Roccland/Westchester Ny Chapter PO Box 96011 Washington, DC 20090-6011	501(c)3	Charitable	ν	20.00
Epilepsy Foundation	PO Box 96546 Washington, DC 20077-7222	501(c)3	Chantable	s	15 00
American Heart Association	PO Box 78857 Phoenix, AZ 85062-8851	501(c)3	Chantable	vs	15 00
The ALS Association	PO Box 8178 Pueblo, Colc. 81008-8178	501(c)3	Charitable	σ,	20.00
Barry Wynn, Executive Director Americans United	PO Box 96033 Washington, DC 20090-6033	501(c)3	Charitabio	v	25 00
Autum Society of America	PO 80x 96223 Washington, DC 20090-6223	501(c)3	Charitable	s	10.00
American Jewish World Service	PO Box 96061 Washington, DC 2090-6061	501(c)3	Charitable	\$	10.00
American Lung Association	PO Box 700 Albert Lea, MN 56007-8000	501(c)3	Charitable	s	10 00
Children's Cancer Research Foundation	PO Box 7006 Albert Lea, MN 56007-8006	501(c)3	Charitable	s	10 00
Christopher + Dana Reeve Foundation	PO Box 9004 Waldorf, MS 20697-0410	501(c)3	Charitable	w	10 00
Hillcrest Volunteer Fire Co No. 1	200 North Main Street Spring Valley, NY 10977	501(c)3	Charitable	w	25.00
Arbor Day Foundation	211 N 12 Street Uncoln, NE 68508-1497	501(c)3	Charitable	Ś	10.00
Arbor Day Foundation	212 N 12 Street Lincoln, NE 68508-1497	501 (c) 3	Charitable	s,	15.00
Ranald McDanald House New York	PO Box 2489 New York, NY 10131-0601	501(c)3	Chantable	s	10 00
Jewish National Fund	PO Box 5609 Hicksville, NY 11802-5609	501(c)3	Charitable	ν,	15.00
AMFAR	PO Box 96635 Washington, DC 20090-6635	501(c)3	Charitable	φ.	10.00
BNAI Brith International	PO Box 17035 Milwaukee, WI 53217-9862	501 (c) 3	Charitable	σ	25 00
American Foundation for the Blind	PO Box 96051 Washington, DC 20077-7624	501(c)3	Charitable	w	10.00
American Diabetes Association	PO Box 1534 Memfield, VA 22116-8034	501(c)3	Charitable	s	10.00
American Institute for Cancer Research	1759 R Street N.W. PO Box 99167 Washington, DC 20077-7824	501 (c) 3	Chantable	s	10.00
Anti Defamation League	PO Box 96226 Washington, DC 20090-6226	501(c)3	Charitable	s	15.00
Amencan Cancer Soceity	PO Box 1100 Syracuse, NY	501 (c) 3	Charitable	s	100 00
Temple Bethel	415 Viola Road Spring Valley, NY 10977	501(c)3	Charitable	s	2,000 00
Temple Bethei	416 Viola Road Spring Valley, NY 10977	501(c)3	Charitable	s	283.75
Jewish National Fund	PO Box 5609 Hicksville, NY 11802-5609	501(c)3	Charitable	•^	20.00
Disabled American Veterans	PO Box 14301 Cincinnati, OH 45250-0301	501(c)3	Chantable	₩.	10.00
Cystic Fibrosis Foundation	PO Box 96305 Washington, DC 20090-6305	501(c)3	Charitable	S	10 00
Hillel- The FDN for Jewish Campus Life	PO Box 92994 Washington, DC 20090-2994	501(c)3	Charitable	s	18 00
Foundation Fighting Blindness	PO Box 17279 Baltimore, MD 21291-0495	501(c)3	Charitable	S	10 00
Disabled American Veterans	PO Box 14301 Cincinnati, OH 45250-0301	501(c)3	Charitable	٠.	10.00
s on Wheels Mail Processing Dept Stanley Isaacs Neighborhood C Po Box 504 Etna, NH 03750-0507	od C Po Box 504 Etna, NH 03750-0507	501 (c) 3	Charitable	s	10.00
Arthritis Foundation	PO Box 96250 Washington, DC 20090-8280	501 (c) 3	Charitable	√	10.00
Temple Bethel Mens Club	41S Viola Road Spring Valley, NY 10977	501(c)3	Charitable	s	40.00

The Morton & Phyllis Simon Foundation ID # 22-3010423

31-0ct-12

Name

Name	Address	Foundation Status
		of Receipients
Hearing Loss Association of America Membership	Woodmont Ave, Suite 1250, Bethesda, MD 20514	501(c)3
Amencan Leprosy Missions	P.O Box 5002 Washington, DC 20090-6226	501(c)3
American Leprosy Missions	P.O Box 5002 Washington, DC 20090-6227	501(c)3
Braille institute of America	742 N Vermont Ave Los Angeles, CA 90029-9988	501(c)3
Braille Institute of America	742 N. Vermont Ave Los Angeles, CA 90029-9988	501(c)3
Alzheimers Assn (Rockland/Westchester, NY Chapter)	2 Jefferson Plaza Poughkeepsle, NY 12601-4060	501(c)3
Haver Straw Ambulance Corps Inc.	160 North Route 9W Haverstraw, NY 10927	501(c)3
Cancer Research Inst.	55 Broadway St. NY, NY 10006-3724	501(c)3
American Kidney Fund	PO Box 1537 Merrifield, VA 22116-9743	501 (c) 3
Blue Card Inc.	171 Madison Ave NY, NY 10018	501(c)3
Jewish War Veterans	12 Hidden Glen Road Alrmond, NY 10952	501(c)3
International Fellowship of Christians & Jews	Rabbi Yechel Eckstein PO Box 97339 Washington DC 30077-7472	501(c)3
Junior Blind of America	5300 Angeles Vista Blvd. Los angeles, CA 90043-9923	501(c)3
BBB Wisegruing Alliance (Better Business Guide)	PO Box 1808 Nerrifield, VA 22116-8005	501(c)3
Temple Bethel	416 Viola Road Spring Valley, NY 10977	501(c)3
Corporation Service Company	PO 80x 13397 Philadelphia, PA 19101-3397	501(c)3

35 00 10 00 10 00 10 00 10 00 25 00 15 00 15 00 15 00 15 00 15 00 15 00 15 00 15 00 15 00 15 00 15 00 15 00 15 00 15 00 15 00 15 00 16 00

Charitable Chantable Chantable Charitable Charitable

Charitable

Charitable Charitable

Charitable

Amount

Purpose of Grant Contribution

Chantable Charitable Charitable Charitable

Charitable

7,273.35

s

Charitable Charitable

Total

Form 8868 (Rev. 1-2012)					Page 2
 If you are filing for an Additional (Not Automatic) 3-Month Ex 					▶ 🛣
Note. Only complete Part II if you have already been granted an a			filed Form	8868.	
 If you are filing for an Automatic 3-Month Extension, comple 					
Partill Additional (Not Automatic) 3-Month E	xtensio	n of Time. Only file the origin	nai (no c	copies need	ed)
		Enter filer's	identify	ng number, se	e instructions
Type or Name of exempt organization or other filer, see instru	ctions		Employe	r identification	number (EIN) or
print					
File by the THE MORTON A. & PHYLLIS SIMO	ON FO	UNDATION	X	22-301	0423
due date for Number, street, and room or suite no. If a P.O. box s			Social se	curity number	
return. See 3 CHESTNUT DRIVE				•	•
Instructions. City, town or post office, state, and ZIP code. For a fo	oreign add	fress, see instructions.			
POMONA, NY 10970					
					
Enter the Return code for the return that this application is for (file	9 66030	te application for each return)			04
Lines the neterin code for the retern that the application is for fine	a sopera	to application to capitions,	••••••	• • • • • • • • • • • • • • • • • • • •	
Application	Return	Application			Return
ls For	Code	Is For			Code
			2012	LANGE STATE	Code
Form 990	01	Form 1041-A	STEEL SECTION	CONTRACTOR OF THE PARTY OF THE	
Form 990-BL	02	Form 4720			08
Form 990-EZ	01	Form 5227			10
Form 990-PF	05	Form 6069			11
Form 990-T (sec. 401(a) or 408(a) trust)	06	Form 8870			12
Form 990-T (trust other than above)				d F 0000	
STOPI Do not complete Part II if you were not already granted		natic 3-month extension on a prev	COUSIN THE	a Form 8808.	
MORTON A. SIMON		10070 NR 10070			
• The books are in the care of > 3 CHESTNUT DR,	~ PO				
Telephone No. ► <u>845-354-1094</u>		FAX No. >			
• If the organization does not have an office or place of business					P [
If this is for a Group Return, enter the organization's four digit					
box ▶ . If it is for part of the group, check this box ▶			all memb	ers the extens	ion is for.
4 I request an additional 3-month extension of time until			000	21 20	4.0
5 For calendar year, or other tax year beginning _1					14
6 If the tax year entered in line 5 is for less than 12 months, c	neck reas	on: L Initial return L	j Final :	etum	
Change in accounting period					
7 State in detail why you need the extension					
INFORMATION TO PREPARE TAX RET	rurn .	IS NOT AVAIALABLE.			
8a If this application is for Form 990-BL, 990-PF, 990-T, 4720,	or 6069, e	nter the tentative tax, less any	ł		
nonrefundable credits. See instructions.				\$	0.
b If this application is for Form 990-PF, 990-T, 4720, or 6069,					
tax payments made. Include any prior year overpayment all	owed as a	credit and any amount paid			•
previously with Form 8868.			8b	\$	0.
c Balance due. Subtract line 8b from line 8a. Include your pa		h this form, if required, by using	1		•
EFTPS (Electronic Federal Tax Payment System). See instru			8c	\$	<u> </u>
		t be completed for Part II o			
Under penalties of perjury, I declare that I have examined this form, including the form of the law extraction of the law extraction of the law extraction.	ng accomp	anying schedules and statements, and to	the best o	f my knowledge	and belief,
it is true, correct, and complete, and that I am authorized to prepare this fo	"~ PA	_		119	112
Signature Takule Star Title	CPM		Date		12
				Fo#m 88 6	8 (Rev. 1-2012)