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7411

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

OMB No 1545-0052

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

Use the IRS Note: Name of foundation A Employee relation number (05-5034447 Use the IRS Note: The Reubern E. Physical state (or 0 to an number final and delawed to atel address) Romise and state (or 0 to an number final and delawed to atel address) Romise and state (or 0 to an number final and delawed to atel address) Romise and state (or 0 to an number final and delawed to atel address) Romise and state (or 0 to an number final and delawed to atel address) Romise and state (or 0 to an number final and delawed to atel address) Romise and state (or 0 to an number final and delawed to atel address) Romise and state (or 0 to an number final and delawed to atel address) I componention specific address to a tel address) I componention specific address to a tel address to a tel address) Romise and atel address to a delawed to atel address) Romise address to a delawed tel address to a delawed to a tel address to a delawed tel address to address to a delawed tel address to tel address to a de			of the Treasury nue Service Note. The foundation may be a		opy of this retui			requirements		2000	
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H Check bye of organization [] Section 501(c)(2) exempt provide foundation E First market brundation action gate I Check bye of organization [] Section 4547(a)(1) nonexempt charitable trust Other taxable private foundation E First market brundation states was terminated under section 507(01/0), oheck here and state Anapysis terminated under section 507(01/0), oheck here and state Anapysis terminated under section 507(01/0), oheck here and state Anapysis of Revenue and Expenses (The taxable private foundation is notwing b), (c) and (d) must be on cash basis (1) F If the foundation is notwing b), (c) and (d) must be on cash basis (1) F If the foundation is notwing b), (c) and (d) must be on cash basis (1) If the instruction (1) F If the instruction (1) F If the foundation is notwing and temporary cash investments F If the instruction (1)		•					E				
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a Excess of revenue over expenses & disbursements 7, 511						[
				s	7, <u>5</u> 11					<u> </u>	
		b	Net investment income (if negative, enter -0-)				8,761				
c Adjusted net income (if negative, enter -0-) 8, 761	_	c	· · · · · · · · · · · · · · · · · · ·			<u> </u>		8,	761		

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

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Form **990-PF** (2008)

Form 990-PF (2008) The Reuben E. Thalberg Foundation 06-6034447

Page 2

Part	Balance Sheets Attached schedules and amounts in the description column	Beginning of year	End o	f year
rdit.	should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
1	Cash—non-interest-bearing	12,326	18,161	18,161
2	Savings and temporary cash investments	228,871	194,674	194,674
3	Accounts receivable 🕨			
	Less allowance for doubtful accounts >			
4	Pledges receivable 🕨			
	Less allowance for doubtful accounts <			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other			
	disqualified persons (attach schedule) (see page 15 of the			
	instructions)			
7	Other notes and loans receivable (att schedule)			
	Less allowance for doubtful accounts			
<u>छ</u> 8	Inventories for sale or use			
8 Assets 9 10a	Prepaid expenses and deferred charges		560	560
S 10a	Investments—U S and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule) See Stmt 4	37,011	37,011	121,603
c	Investments—corporate bonds (attach schedule)			· · · · ·
11	Investments—land, buildings, and equipment basis			
	Less accumulated depreciation (attach sch)			
12	Investments-mortgage loans			
13	Investments-other (attach schedule)		····· · · · ·	
14	Land, buildings, and equipment basis			
	Less accumulated depreciation (attach sch)			
15	Other assets (describe)			
16	Total assets (to be completed by all filers—see the			
	instructions Also, see page 1, item I)	278,208	250,406	334,998
17	Accounts payable and accrued expenses	2107200	2007100	3017550
40	Grants payable and accided expenses	3,000		
19	Deferred revenue	37000		
	Loans from officers, directors, trustees, and other disqualified persons			
Liabilities	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ► See Statement 5	513		
23	Total liabilities (add lines 17 through 22)	3,513	0	
23	Foundations that follow SFAS 117, check here	5,515	0	
S	and complete lines 24 through 26 and lines 30 and 31.			
Security 24	Unrestricted			
	Temporarily restricted			
<u>е</u> 26	Permanently restricted			
ਹੂ ੈੱ	Foundations that do not follow SFAS 117, check here			
5	and complete lines 27 through 31.			
Net Assets or Fund Balan 0 6 8 2 5 7 1 0 6 8 2 30 1	Capital stock, trust principal, or current funds			
<u>୬</u> 28	Paid-in or capital surplus, or land, bldg , and equipment fund	186,842		
29	Retained earnings, accumulated income, endowment, or other funds	87,853	250,406	
SA 30	Total net assets or fund balances (see page 17 of the		2007100	
	instructions)	274,695	250,406	
2 31	Total liabilities and net assets/fund balances (see page 17	2/1/050	2001100	
0.	of the instructions)	278,208	250,406	
Part		2:07200		t
*****	I net assets or fund balances at beginning of year—Part II, column (a), line 30 (mu	st agree with		
	of-year figure reported on prior year's return)	23	1	274,695
	ar amount from Part I, line 27a		2	7,511
	r increases not included in line 2 (itemize)►		3	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
	lines 1, 2, and 3		4	282,206
	reases not included in line 2 (itemize) ► See Statement 6		5	31,800
	I net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (line 4 minus line 5)	b) line 30	6	250,406
	The assets of fund balances at end of year (inte 4 minus inte 5)-r alt if, column f	o, inc oo		Earm 900 DE (2000

741,1

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(a) List and describe t	Losses for Tax on Investm		me		<u> </u>		<u></u>
(a) List and describe the kind(s) of property sold (e g , real estate, (b) How acquired 2-story bnck warehouse, or common stock, 200 shs MLC Co) D—Durchase						Date acquired o , day, yr)	(d) Date sold (mo , day, yr)
1a N/A							
b							
<u> </u>							
d e							
(e) Gross sales price	(f) Depreciation allowed (or allowable)			r other basis nse of sale			n or (loss) (f) minus (g)
a							
b	·····				L		
<u>c</u>					<u> </u>		·
	ere in column (b) and surred by the	}	n 12/21/6				
Complete only for assets showing g	(j) Adjusted basis			s of col (I)	1		ol (h) gain minus t less than -0-) or
(i) FMV as of 12/31/69	as of 12/31/69		• •	(j), if any			om coi (h))
a							
b							
с		_					
<u>d</u>		_					
e					<u>н</u> т	<u>.</u> , .	
2 Capital gain net income or (net capit	If (loss), enter -0- ir	n Part I, line			2		
3 Net short-term capital gain or (loss)			_				
If gain, also enter in Part I, line 8, co	olumn (c) (see pages 13 and 17 of th	e instruction	ns)				
If (loss), enter -0- in Part I, line 8			ſ				
Double Ovalification Und	ar Section 4040(a) for Pode	und Tax		Invostment Inc	3		
	er Section 4940(e) for Redu		-		ome		
(For optional use by domestic private for	undations subject to the section 494		-		3 ome		
(For optional use by domestic private for If section 4940(d)(2) applies, leave this j	undations subject to the section 494 part blank	0(a) tax on i	net invest	ment income)			
(For optional use by domestic private for If section 4940(d)(2) applies, leave this p Was the foundation liable for the sectior	undations subject to the section 494 part blank n 4942 tax on the distributable amou	0(a) tax on i int of any ye	net invest ar in the t	ment income)		No	
For optional use by domestic private for if section 4940(d)(2) applies, leave this p Was the foundation liable for the sectior	undations subject to the section 494 part blank n 4942 tax on the distributable amou	0(a) tax on i int of any ye	net invest ar in the t	ment income)		No	
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For optional use by domestic private for if section 4940(d)(2) applies, leave this j Was the foundation liable for the section f "Yes," the foundation does not qualify <u>1 Enter the appropriate amount in eac</u> (a) Base period years	undations subject to the section 494 part blank a 4942 tax on the distributable amou under section 4940(e) Do not comp th column for each year, see page 1 (b) Adjusted qualifying distribution	O(a) tax on i nt of any ye blete this pa 8 of the inst	net invest ar in the t rt <u>ructions t</u>	ment income) base period?	res X	Dist	(d) nbutton ratio
For optional use by domestic private for f section 4940(d)(2) applies, leave this j Was the foundation liable for the section f "Yes," the foundation does not qualify <u>1 Enter the appropriate amount in eac</u> (a) Base penod years Calendar year (or tax year beginning in)	undations subject to the section 494 part blank a 4942 tax on the distributable amou under section 4940(e) Do not comp th column for each year, see page 1 (b) Adjusted qualifying distribution	O(a) tax on i ont of any ye blete this part 8 of the inst	net invest ar in the t rt <u>ructions t</u>	ment income) Dase period? Y Pefore making any e (c) of nonchantable-use a	′es Ⅹ ntries ssets	Dist	nbution ratio divided by col (c))
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(For optional use by domestic private for if section 4940(d)(2) applies, leave this j Was the foundation liable for the sectior if "Yes," the foundation does not qualify <u>1 Enter the appropriate amount in eac</u> (a) Base penod years Calendar year (or tax year beginning in) 2007 2006	undations subject to the section 494 part blank 1 4942 tax on the distributable amou under section 4940(e) Do not comp th column for each year, see page 1 (b) Adjusted qualifying distribution 1 0 1 0 1 0 1 7	0(a) tax on int of any ye blete this part 8 of the inst 0, 240 5, 427 0, 859 7, 141	net invest ar in the t rt <u>ructions t</u>	ment income) base period? Y efore making any e of nonchantable-use a 382, 387, 347, 335,	res X ntries ssets 463 215 531 181	Dist	nbution ratio divided by col (c)) 0.050306 0.042423 0.028369 0.051140
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 (For optional use by domestic private for if section 4940(d)(2) applies, leave this provide the foundation liable for the section of the section of	undations subject to the section 494 part blank 1 4942 tax on the distributable amou under section 4940(e) Do not comp th column for each year, see page 1 (b) Adjusted qualifying distribution 1 2 1 4 ear base period—divide the total on been in existence if less than 5 yea -use assets for 2008 from Part X, lin	line 2 by 5, rs	net invest ar in the t rt ructions b	ment income) base period? Y efore making any e of nonchantable-use a 382, 387, 347, 335,	res X ntries ssets 463 215 531 181	2 3 4 5 6	nbutton ratio divided by col (c)) 0.050306 0.042423 0.028369 0.051140 0.044423 0.216661 0.043332 227,017 9,837
 (For optional use by domestic private for if section 4940(d)(2) applies, leave this provide the foundation liable for the section of the section of	undations subject to the section 494 part blank 1 4942 tax on the distributable amou under section 4940(e) Do not comp th column for each year, see page 1 (b) Adjusted qualifying distribution 1 2 1 4 ear base period—divide the total on been in existence if less than 5 yea -use assets for 2008 from Part X, lin	line 2 by 5, rs	net invest ar in the t rt ructions b	ment income) base period? Y efore making any e of nonchantable-use a 382, 387, 347, 335,	res X ntries ssets 463 215 531 181	2 3 4 5	nbutton ratio divided by col (c)) 0.050306 0.042423 0.028369 0.051140 0.044423 0.216661 0.043332 227,017 9,837

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

Form 990-PF (2008) The Reuben E. Thalberg Foundation 06-6034447

Form	990-PF (2008) The Reuben E. Thalberg Foundation 06-6034447		F	Page 4
Pa	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instruction	s)		
1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1			
	Date of ruling letter (attach copy of ruling letter if necessary-see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check			88
	here ► X and enter 1% of Part I, line 27b			
С	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-)			0
3	Add lines 1 and 2			88
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			0
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0- 5			88
6	Credits/Payments			
а	2008 estimated tax payments and 2007 overpayment credited to 2008			
b	Exempt foreign organizations—tax withheld at source 6b 63			
с	Tax paid with application for extension of time to file (Form 8868) 6c			
ď	Backup withholding erroneously withheld 6d			
7	Total credits and payments Add lines 6a through 6d 7			623
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached			000
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			535
11	Enter the amount of line 10 to be Credited to 2009 estimated tax			535
	Interviewe and the second to 2009 estimated taxe of the second of the se			555
 1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it	1	Yes	No
14	participate or intervene in any political campaign?	1a	163	X
h				
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	16		x
	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 Form 1120-POL for this year?	1c		<u>X</u>
ď	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
	(1) On the foundation ▶ \$ (2) On foundation managers ▶ \$			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on			
_	foundation managers \$.,
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	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 instrument, articles of			
	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		<u>X</u>
b	If "Yes," has it filed a tax return on Form 990-T for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
	If "Yes," attach the statement required by General Instruction T			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
	 By language in the governing instrument, or 			
	 By state legislation that effectively amends the governing instrument so that no mandatory directions that 			
	conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Х	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the			
	Instructions) 🕨 None			
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	Х	
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 2008 or the taxable year beginning in 2008 (see instructions for Part XIV on			
	page 27)? If "Yes," complete Part XIV	9		Х
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their			
	names and addresses	10		x

Form 990-PF (2008)

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Form 980-PF (2008) The Reuben E. Thalberg Foundation 06-6034447 Page 5 Part VIA. Statements Regarding Activities (continued) 11 1 1 1 11 Alary time dung Payea, dath toodado, dicety or indexity, on a controlod entry with its meaning of section 53(1)(3)?1 ("st, "statis obselve (see page 20) of the instructions) 11 1	741,1	ı					
Part VII-A. Statements Regarding Activities (continued) 11 Any means pays, add me brounded, ordery or madex, and a scatcled dety with the manual returns and exemption application? 11 12 Did the foundation acquee a direct or indirect interest in any applicable insurance contract before August 17, 2005? 12 X 13 Did the foundation acquee a direct or indirect interest in any applicable insurance contract before August 17, 2005? 13 Did the foundation acquee a direct or indirect interest in any applicable insurance contract before August 17, 2005? 12 X 13 X 14 The books are in care of ▶ Genevieve B. Thalberg, CPA Telephone no ▶ 860-628-6704 21 Section 497(a)(1) nonsexempt interest incoved or accrued during the year ▶ 15 Part VIL-A Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 fary item is checked in the "Yee" column, unless an acception applies. 15 During the year did the foundation (wherd inferent receaved or accrued during the year Yes No 16 During the year did the foundation (wherd inferent receaved or accept if form) a disqualified person? Yes No 16 File Form 4720 fary item is checked in the "Yee" column, unless an acception applies. No No 16 Form money forin, find money	For	$\frac{1}{1000}$ PE (2008) The Reuber F Thalberg Foundation 06-6034447				c	2000 5
11 At any time during the spart of the function, directly or indexity, con a control denty with the method costs 11 X 12 Dot the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2009° 11 X 12 X 13 Dot the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2009° 11 X 12 X 14 The books are neare of ► Genevieve B. Thalberg, CPA Telephone no ► 860-628-6704 32 20 or the foundation comply with the public inspection requirements for its annual returns and exemption applicable. 11 X 12 X 14 The books are neare of ► Genevieve B. Thalberg, CPA Telephone no ► 860-628-6704 32 20 or the mamoting diversempt interaction for 990-PF in lieu of form 1041-Check here and effer the amount of fux-sempt interaction of 990-PF in lieu of form 1041-Check here and effer the amount of fux-sempt interaction in directly or infractly 11 11 X 16 Doring the year of the foundation celler directly or infractly Infractly infractly infractly Yes No 10 Drung the year of the foundation infert directly or infractly Infractly infractly Yes No 11 Ergeneric Provise Cost acquatified person? Yes No <						<u> </u>	age 5
12 Dot the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? 13 Dot the foundation acquire a direct or indirect interest in any applicable. 12 X 13 Dot the foundation acquire a direct or indirect interest in any applicable. 12 X 13 X 14 The books are incare of ▶ Genevieve B. Thalberg, CPA Telephone no ▶ 860-628-6704 32 20 7 219 Section 4947(a)(1) nonexampt chartable trusts filing form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest readed or accued during the year and anter the amount of tax-exempt interest readed or accued during the year and acquired parts. 15 16 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) Brorem money form. Idense to cordinate any of entifier available for the boundation to, apa or remburse the exception. Check 'No'' if the foundation aggined to make a girant to art to engive the official for a genoid after termination of government after any income or properly to a girant to art to engive the size astance (see page 20 of the instructions)? Organization relying on a current notice regarding disaster asstance (see page 20 of the instructions)? Organization relying on a current notice regarding disaster asstance (see page 20 of the instructions)? Organization relying on a current notice regarding disaster asstance (see page 20 of the instrucutions)? Organization relying on a		At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the					
August 17. 2009 12 X 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 X 14 The books are in are of ▶ Genevieve B. Thalberg, CPA Telephone no ▶ 860-628-6704 14 The books are in are of ▶ Genevieve B. Thalberg, CPA Telephone no ▶ 860-628-6704 15 Section 447/0(1) consexempt charable trust Sing Form 950-PF in leu of Form 1041Check here ▶ 15 Part VI-B Part VI-B Statements Reparading 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 Borrow money from, lend money to, or otherwise extend credit to (or accept 1 from) a disqualified person? Uses X No (3) Function adjust of pacify with a disqualified person? Uses X No (4) Fay compension to, or ops or reminums the expenses of a disqualified person? Uses X No (5) Transfer any moore or assets to a disqualified person? Uses X No (6) Agree to pay moremy crosperity to a government offica? (Exception. Check 'No* f Uses X No (7) Transfer any moore or assets to a disqualified person? Ves X					11		X
13 Det the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 X 14 The books are in care of ▶ Genevieve B. Thalberg, CPA Telephone no ▶ 860-628-6704 32 North Main St ZIP-4 ▶ 06489-0272 15 Section 4947(a)(1) onexempt charatable trusts fing Form 990-PF in lieu of Form 1041—Check here and entite exempt in direatable trusts fing Form 990-PF in lieu of Form 4720 May Be Required 15 Part VILB Statements Regarding Activities for Which Form 4720 May Be Required Yes No 10 Uring the sole or exchange, or leasing of property with a disqualified person? Yes No (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No (3) Furnhal poods, servoces, or facilities to (or accept the from (a) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No (5) Transfer any mome or property to a government formal of a disqualified person? Yes No (6) Agree to pay momey or property to a government formal of a disqualified person? Yes No (6) Agree to pay momey or property to a government forelloa? Chance the condatio	12						v
Website address ▶ N/A Telephone no ▶ 860-628-6704 14 The books are in care of ▶ Genevieve B. Thalberg, CPA Telephone no ▶ 860-628-6704 12 Section 447(0(1) nonexempt charable trusts fling Form 930-PF in lieu of Form 1041Check here Image: Constraint of tax-exempt interest received or accrued during the year Image: Constraint of tax-exempt interest received or accrued during the year Image: Constraint of tax-exempt interest received or accrued during the year Image: Constraint of tax-exempt interest received or accrued during the year Part VILB Statements Regarding Activities for Which Form 7720 May Be Required Image: Constraint of tax-exempt interest received or accrued for mace parts interest received or parts in the interest or order were extend credit to (or accept if from) a disqualified person? Yes No (3) Furnish goods, services, or facilities to (or accept from) a disqualified person? Yes No (4) Pay or prombure the expenses of a disqualified person? Yes No (5) Fariafer any income or assets to a disqualified person? Yes No (6) Agree to pay morey or property to a government officia? (Exception. Check "No" f Yes No (6) Agree to pay morey or property to a government officia? (Exception. Check "No" f Yes No (7) Taxes on falure to distitute income (section 490 days) </th <th></th> <th>-</th> <th>-0</th> <th></th> <th></th> <th>v</th> <th><u> </u></th>		-	-0			v	<u> </u>
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6e, Part XIII) for tax year(s) beginning before 2008? Yes X No If "Yes," list the years ▶ 20 20 20 20 b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions) N/A 2b c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here N/A 2b b 20 , 20 , 20 , 20 . . . 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes X No b If "Yes," did it have excess business holdings in 2008 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 2008) N/A 3b 4a X A A A A b Did the foundation nivest during the year any amount in a manner that would jeopardize its charitable purposes? A </td <td>-</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	-						
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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 2008) N/A 3b 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008? 4b X	þ						
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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 2008? 4b X	4 -	- <i>i</i>		N/A			
charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008? 4b X					48		
	a		82		Ah	:	x
			• <u>·</u>	Fc	<u> </u>	0-PF	

	990-PF(2008) The Reuben E. Thalberg Foundation 06-6034447				Pa	age 6
P á	art VII-B. Statements Regarding Activities for Which Form 4720 May Be Required	contin	ued)	· ······		
5a	During the year did the foundation pay or incur any amount to				ł	
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	Yes	X No		Ī	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on,		_		ŧ	
	directly or indirectly, any voter registration drive?	Yes	X No		ŧ	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	Yes	No		ŧ	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in				1	
	section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)	Yes	X No		1	
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or		_		I	
	educational purposes, or for the prevention of cruelty to children or animals?	Yes	X No		1	
b	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in		—		1	
	Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)	>		5b		X
	Organizations relying on a current notice regarding disaster assistance check here	►				
с	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax		—		I	
	because it maintained expenditure responsibility for the grant? N/A	Yes	No		I	
	If "Yes," attach the statement required by Regulations section 53 4945-5(d)	•			ł	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums				I	
	on a personal benefit contract?	Yes	X No		Į	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			6b		Х
	If you answered "Yes" to 6b, also file Form 8870				I	
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	Yes	X No		1	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		N/A	7b		
D	art VIII Information About Officers, Directors, Trustees, Foundation Managers, High	ılv Pai		Vees		

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 (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances				
See Statement 7								

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

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Part VIII .	D08) The Reuben E. Thalberg Foundation Information About Officers, Directors, Trustees, Found and Contractors (continued)		Page 7 nployees,
3 Five highe	est-paid independent contractors for professional services (see page 2	3 of the instructions). If none, enter "N	ONE."
	(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		
Part IX-A	Summary of Direct Charitable Activities		
	on's four largest direct charitable activities during the tax year Include relevant statistical and other beneficiaries served, conferences convened, research papers produced, etc	information such as the number	Expenses
1 N/A			
2			
3			
4			
Part IX-B	Summary of Program-Related Investments (see page	23 of the instructions)	
	largest program-related investments made by the foundation during the tax year on lines	s 1 and 2	Amount
1 N/A			
2			
All other program	-related investments See page 24 of the instructions		
Total. Add lines	1 through 3	•	

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Form 990-PF (2008)	The	Reuben	Ε.	Thalberg	Foundation	06-6034447

Pa	Art X Minimum Investment Return (All domestic foundations must complete this part. For	eign	foundations,
	see page 24 of the instructions.)		<u> </u>
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	211,773
b	Average of monthly cash balances	1b	15,244
С	Fair market value of all other assets (see page 24 of the instructions)	1c	0
đ	Total (add lines 1a, b, and c)	1d	227,017
е	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	227,017
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25		
	of the instructions) See Statement 8	4	0
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	227,017
6	Minimum investment return. Enter 5% of line 5	6	11,351
Pa	TT XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private of	operati	ng
	foundations and certain foreign organizations check here and do not complete this part)		
1	Minimum investment return from Part X, line 6	1	11,351
2a	Tax on investment income for 2008 from Part VI, line 5 2a 88		
b	Income tax for 2008 (This does not include the tax from Part VI) 2b		
с	Add lines 2a and 2b	2c	88
3	Distributable amount before adjustments Subtract line 2c from line 1	3	11,263
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	11,263
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII,		
-	line 1	7	11,263
Pa	art XII Qualifying Distributions (see page 25 of the instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etctotal from Part I, column (d), line 26	1a	38 , 157
b	Program-related investmentstotal 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		
а	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	38,157
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income		
	Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	88
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	38,069
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation	ation	

qualifies for the section 4940(e) reduction of tax in those years

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Form 990-PF (2008) The Reuben E. Thalberg Foundation 06-6034447 Part XIII Undistributed Income (see page 26 of the instructions)

	irt Alle . Undistributed income (see page 20 01				
			(a)	(b)	(c)	(d)
1	Distributable amount for 2008 from Part XI	,	Corpus	Years prior to 2007	2007	2008
_	line 7					11,263
2	Undistributed income, if any, as of the end	of 2007				ł
a						
	Total for prior years 20, 20					· ····································
3	Excess distributions carryover, if any, to 20	800				1
а	From 2003					ŧ
b						ł
C						
	From 2006					ŧ
-	From 2007					ŧ
	Total of lines 3a through e					
4	Qualifying distributions for 2008 from Part	XII,				ł
	line 4 ▶\$ <u>38,157</u>					ŧ
	Applied to 2007, but not more than line 2a					<u>+</u>
b	Applied to undistributed income of prior yea	ars (Election				
	required—see page 26 of the instructions)					·
C	Treated as distributions out of corpus (Elec	ction				ŧ
	required—see page 26 of the instructions)					
	Applied to 2008 distributable amount					11,263
	Remaining amount distributed out of corpu		26,894			1
5	Excess distributions carryover applied to 2					
	(If an amount appears in column (d), the sa	ame				ŧ
	amount must be shown in column (a))					ł
6	Enter the net total of each column as					ŧ
	indicated below:					ŧ
	Corpus Add lines 3f, 4c, and 4e Subtract		26,894			······
b	Prior years' undistributed income Subtract					ŧ
	line 4b from line 2b				L	·
C	Enter the amount of prior years' undistribut					ł
	income for which a notice of deficiency has					ł
	issued, or on which the section 4942(a) tax	(nas				ŧ
	been previously assessed					1
d	Subtract line 6c from line 6b Taxable					ŧ
_	amount—see page 27 of the instructions					
e	Undistributed income for 2007 Subtract lin					
	4a from line 2a Taxable amount—see pag 27 of the instructions	C .				
	27 of the instructions Undistributed income for 2008 Subtract lin					1
ľ						
	4d and 5 from line 1 This amount must be					0
7	distributed in 2009 Amounts treated as distributions out of cor	2010		·····		·
7	to satisfy requirements imposed by section					
	170(b)(1)(F) or $4942(g)(3)$ (see page 27 of					ŧ
	instructions)	uie				ŧ
8	Excess distributions carryover from 2003 n	lot				· · · · · · · · · · · · · · · · · · ·
U	applied on line 5 or line 7 (see page 27 of t					ŧ
	instructions)					ŧ
9	Excess distributions carryover to 2009.					
3	Subtract lines 7 and 8 from line 6a		26,894			ŧ
10	Analysis of line 9		20,004			1
a	Excess from 2004					
a b	Excess from 2005					ŧ
c	Excess from 2006					ŧ
d	Excess from 2007					ŧ
e	Excess from 2008	26,894				1

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	990-PF (2008) The Reuben E rt XIV Private Operating Fou					Pa
					VII-A, question 9)	
	If the foundation has received a ruling or foundation, and the ruling is effective for 2			ung		
	Check box to indicate whether the foundation		-	bed in section	42(j)(3) or 4942	(1)(5)
	Enter the lesser of the adjusted net	Tax year		Pnor 3 years		
	income from Part I or the minimum	(a) 2008	(b) 2007	(c) 2006	(d) 2005	(e) Total
	investment return from Part X for	(a) 2000	(0) 2001	(0) 2000	(0) 2000	
	each year listed					
	85% of line 2a					· _ · · · -
	Qualifying distributions from Part XII,			[······		<u>-</u>
	line 4 for each year listed					
	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					
	Complete 3a, b, or c for the				· · · · · · · · · · · · · · · · · · ·	
	alternative test relied upon					
	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under					
	section 4942(j)(3)(B)(i)					
	"Endowment" alternative test-enter 2/3 of					
	minimum investment return shown in Part					
	X, line 6 for each year listed					
	"Support" alternative test-enter					
	(1) Total support other than gross		[Í		
	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					
a	rt XV Supplementary Inform	nation (Complete	e this part only if	the foundation ha	ad \$5,000 or more	e in assets
	at any time during the	• •	• •		· •	
	Information Regarding Foundation Ma				· · · · · · · · · · · · · · · · · · ·	
	List any managers of the foundation who	-	e than 2% of the total	contributions received b	y the foundation	
	before the close of any tax year (but only					
	N/A	-,			,	
	List any managers of the foundation who	own 10% or more of t	the stock of a corporat	ion (or an equally large	portion of the	· · · · · · · · · · · · · · · · · · ·
	ownership of a partnership or other entity				F	
	N/A					
	Information Regarding Contribution, G	rant. Gift. Loan. Sch	olarship, etc., Progr	ams:		
	Check here ► I if the foundation only				bes not accept	
	unsolicited requests for funds If the found		-	=		
	organizations under other conditions, con	· ·		···· · , ··		
	The name, address, and telephone numb			ld be addressed		
	Genevieve B. Thalber	•	······································			
	<u>P.O. Box 272, Southi</u>		06489			
_	The form in which applications should be			ev should include		
	SEE APPLICATION ATTA		actor and materials th			
	Any submission deadlines			- <u></u>	<u></u>	
	March 31st					

Form 990-PF (2008) The Reuben E. Thalberg Foundation 06-6034447

Part XV . Supplementary Information (continued)

continued)

Grants and Contributions Paid During th	if recipient is an individual,	Foundation		
Recipient	show any relationship to	status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor			
Paid during the year		7 /1 2 /00		
Brandeis University	Donation	7/13/09		1,00
				1,000
Southern CT Hebrew Academ	Donation	7/13/09		1,000
				1,000
Yale-New Haven Hospital	Donation	11/23/09		25,00
				25,000
Ithaca College	Scholarship	12/03/08		2 00
fbo-Jessica Crispino				3,000
Penn. State University	Scholarship	11/17/09		1 00
fbo-Marissa Champan				1,800
Quinnipiac University	Scholarship	11/17/09		0.50
fbo-Melissa Hastie				2,500
Central CT St University	Scholarship	11/24/09		
fbo-Amanda Golec				500
Total	<u> </u>		► 3a	34,80
Approved for future payment				
See Statement 10				30,70
				30,700
		ļ		

Page 11

Form 990-PF (2008) The Reuben E. Thalberg Foundation 06-6034447

Page	1	2
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1 Program service revenue (a) (b) (c) (d) Amount (See page a		ounts unless otherwise indicated	Unrelate	d business income	Exclude	d by section 512, 513, or 514	(e) Related or exempt
a b c c d g f g f g f g f g f g f g fees and contracts from government agencies g fees and contracts from government agencies g fees and contracts from government agencies g fees and contracts from securities g fees and contracts from government agencies g fees and contracts from securities g fees and colores g g <th>, Drogram ca</th> <th></th> <th></th> <th></th> <th>Exclusion</th> <th></th> <th>Related or exempt function income (See page 28 of the instructions)</th>	, Drogram ca				Exclusion		Related or exempt function income (See page 28 of the instructions)
b	•						
c			-				
d			-		+ -		
e			- }				
f							
g Fees and contracts from government agencies Membership dues and assessments			-				
Membership dues and assessments		od contracts from government agencies	-				
Interest on savings and temporary cash investments Dividends and interest from securities Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property Net rental income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from sales of inventory Net income or (loss) from sales of inventory Other revenue a b c c d d e Subtotal Add columns (b), (d), and (e) Statistical Add ine 12, columns (b), (d), and (e) Statistical Add ine 12, columns (b), (d), and (e) Statistical Add ine 12, columns (b), (d), and (e) Statistical Add ine 12, columns (b), (d), and (e) Statistical Add ine 12, columns (b), (d), and (e) Statistical Add ine 12, columns (b), (d), and (e) Statistical Add ine 12, columns (b), (d), and (e) Statistical Add ine 13 instructions on page 28 to verify calculations) Statistical Add ine 13 instructions on page 28 to verify calculations is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)	-			·······			<u>.</u>
Dividends and interest from securities Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property Net rental income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue a b							5,65
Net rental income or (loss) from real estate							6,46
a Debt-financed property b Not debt-financed property Net rental income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue a							
b Not debt-financed property Net rental income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue a b c d d d d d d d d d d d d d d d d d d		• •					
Net rental income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue a b c d e Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. V					-		
Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue a b c c d e Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. V Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)					1		
Gain or (loss) from sales of assets other than inventory					1		
Net income or (loss) from special events					1		
Gross profit or (loss) from sales of inventory Other revenue a b c c d d d d d d d d d d d d d d d d d							
Other revenue a					1		
b	-						
c							
d			-				
e							
Subtotal Add columns (b), (d), and (e) 0 1 Total. Add line 12, columns (b), (d), and (e) 13 1 ee worksheet in line 13 instructions on page 28 to verify calculations) 13 1 Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)			-				
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Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)							
Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)	the second s	III IIIIE IS IIISUUCIOIIS ON DAGE 20 10 VEIIIV CAICUIA	(IONS)				
				ent of Exempt I	Purpos	es	
	Part XVI-B Line No.	Relationship of Activities to the A Explain below how each activity for which incom	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
Image: Section of the section of th	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
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	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
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	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
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	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	
	Part XVI-B Line No. ▼	Relationship of Activities to the A Explain below how each activity for which incom the accomplishment of the foundation's exempt	Accomplishm	olumn (e) of Part XVI	-A contrib	outed importantly to	

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		2008) The Reube					06-6034				Page	13
Pa	art XVII	Information Rega Exempt Organization		ansfers To and ⁻	Transactio	ons an	d Relations	hips With	Nonch	aritable		
1	Did the c	organization directly or indi	rectly engag	e in any of the follow	ing with any o	ther org	ganization descr	ibed			Yes N	<u>lo</u>
	in section	n 501(c) of the Code (othe	r than section	on 501(c)(3) organizat	tions) or in se	ction 52	7, relating to po	litical			I	
	organiza	tions?									1	
а	-	s from the reporting found	ation to a no	oncharitable exempt o	organization of	F					I	
	(1) Casl			•	•					1a(1)		<u> </u>
	(2) Othe									1a(2)	2	K
h	• •	Insactions										
		s of assets to a noncharita	able exemnt	organization						1b(1)		<u> </u>
	• •	hases of assets from a no	-	-						1b(2)	- 5	<u>x</u>
		tal of facilities, equipment,								1b(3)		<u>×</u> _
	• •	nbursement arrangements		5613						1b(4)		<u>×</u>
	•••	-								1b(5)		X
	• •	ns or loan guarantees		- fundrounna polioitati						1b(5) 1b(6)		X
_	• •	ormance of services or me		•						1c		X
C L	-	of facilities, equipment, ma	-					outho for m	orkot		4	<u>,</u>
a		swer to any of the above is										
		the goods, other assets, o										
		any transaction or sharing										
	a) Line no	(b) Amount involved	(c) Name	of noncharitable exemp	t organization	(d)	Description of tra	insters, transac	tions, and	snaring arranger	nents	—
<u>N/</u>	A											—
												—
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												<u> </u>
2a		undation directly or indirec				•	t organizations				.	
		d in section 501(c) of the		than section 501(c)(3	or in section	n 527?				Ye	s X M	٩N
<u> </u>	If "Yes,"	complete the following sc	hedule	r								—
		(a) Name of organization		(b) Type of orga	Inization			(c) Description	on of relati	ionship		
	<u>N/A</u>											
	Under per	naities of perjury, I declare that s true, correct, and complete I	I have exami	ned this return, including	accompanying	schedule	es and statements,	and to the best	of my kno	wiedge and		
	belief, it is	s true, correct, and complete L		preparer (other than taxp	ayer or fiduciary	/) is base			arer nas a	ny knowledge		
	·	FGLIV Ni	<u>ll</u>	Tinster	10/1	<u>5/10</u>	_	/NUST	<u> </u>			
ø	Signa	ature of officer or trustee	/		Date	<u> </u>	۲ ا	itle				
Sign Here							Date			Preparer's identify	ng	
۲,	~		/					Check if		number (see Sigr	nature on	
igr	ا مريد ا مورد	Preparer's	ヲダ	X~(10 r.	DA_			self-employe	d ▶ 🗙	page 30 of the ins	tructions)	
ิด	Paid Preparer's Use Only	signature	x / 1 `	yee. u	17'		10/15/10			041-48	-334	5
	Use L	Firm's name (or yours if	Ralph	V. Ingrise	elli, CI	PA						
	-	self-employed), address,	-						EIN 🕨	06-1179	9 <u>65</u> 0	
		and ZIP code		nington, CT	06489	9			Phone n	860-628		9 <u>6</u>
										Form 99	D-PF (2	008)

	Γ														
		Charitable Purpose	\$ <u>2,707</u> \$ <u>2,707</u>		Charitable Purpose	\$ 63	\$ 63		Charitable Purpose	۰ ۲	34	20	495	\$ 587	
	ting Fees	Adjusted Net	\$ 2,707 \$ 2,707	Kes	Adjusted Net	\$ 63	\$ (3	Kpenses	Adjusted Net	Ş	34	50	α 495	\$ 587	
Federal Statements	<u>990-PF, Part I, Line 16b - Accounting Fees</u>	Net Investment	\$ <u>2,707</u> \$ <u>2,707</u>	Form 990-PF, Part I, Line 18 - Taxes	Net Investment	\$ 63	\$ 63	<u> Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses</u>	Net Investment	Ş	34	50	495	\$ 587	
Federal S	Statement 1 - Form 990-PF, Pa	Total	\$ <u>2,707</u> \$ <u>2,707</u>	Statement 2 - Form 990-	Total	\$ 63	\$ 03	ent 3 - Form 990-PF, P	Total	s	34	50	495	\$	
7411 The Reuben E. Thalberg Foundation 06-6034447 FYE: 11/30/2009	Stateme	Description	Accounting Services Total	5	Description	Foreign Tax Paid	Total	Statem	Description		Expenses Legal Notice	Annual Report	Investment rees Dues & Subscriptions	Total	

1-3

7411 The Reuben E. Thalberg Foundation 06-6034447 **Federal Statements** FYE: 11/30/2009

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

Description				
	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
282 shs Verizon \$	2,599 \$	2,599	Cost	\$ 8,872
280 shs Connecticut Water Service				
14 shs Idearc, Inc.	1,647	1,647		6,356
202 shs Comcast Corp.	99	99	Cost	
49 shs Alcate1	1,493	1,493	Cost	2,961
	796	796	Cost	163
141 shs Quest Communications, Inc.	718	718	Cost	515
1354 shs NSTAR	5,667	5,667	Cost	44,858
192 shs IBEROLA	9,873	9,873		7,287
175 shs Vodafone				
24 shs NCR	284		Cost	3,971
24 shs Teradata	57	57	Cost	226
800 shs PEPCO Holdings, Inc.	63	63	Cost	ʻ 703
	7,647	7,647	Cost	13,040
64 shs A T & T, Inc.	895	895	Cost	4,822
671 shs A T & T, Inc.	3,356	3,356	Cost	10,667
477shs A T & T, Inc.	1,805	1,805		7,430
5 shs FairPoint Communication, Inc				
Total \$	<u> 12</u> 37,011 \$	37,011	Cost	9,732 \$ 121,603
				Y 121,003

Statement 5 - Form 990-PF, Part II, Line 22 - Other Liabilities

Description	Be	ginning f Year	 End of Year
Federal Excise Taxes Payable	\$	513	\$
Total	\$	513	\$ 0

4-5

7411 The Reuben E. Thalberg Foundation 06-6034447 **Federal Statements** FYE: 11/30/2009

Statement 6 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	 Amount
Scholarships Paid	\$ 31,800
Total	\$ 31,800

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7411 The Reuben E. Thalberg Foundation 06-6034447 FYE: 11/30/2009	Federa	-ederal Statements			
Statement 7 - Form 990-PF,	٩	<u>ine 1 - List of Offic</u>	art VIII, Line 1 - List of Officers, Directors, Trustees, Etc.	es, Etc.	
Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
Genevieve B. Thalberg 61 Panorama Drive, Southington, CT 06489	Sec/Treas	0	250	0	0
Joseph M. Angelillo 475 Meriden Ave., Southington, CT 06489	Trustee	0	250	0	0
Nadine M. Britton 72 Hillside Ave., Plantsville, CT 06479	Trustee	0	250	0	0
* Ralph V. Ingriselli 50 River View Court Cheshire, CT 06410	Trustee	0	250	0	0
L. Stewart Bohan 225 Acorn Drive Middletown, CT 06457	Trustee	0	250	0	0
1		0	0	0	0
1		0	0	0	0
* In addition to the above the		0	0	0	0
Trustee Ralph V. Ingriselli received		0	0	0	0
\$2,707 payment for accounting and		0	0	0	0
tax services during the current year		0	0	0	0
•					7

Statement 8 - Form 990-PF, Part X, Line 4 - Cash Deemed Held - Greater Amount Explanation

		Desc	riptio	n			Amount
Scholarships	Awarded	and	Due	along	with	Expenses	0
Total							0

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Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description

SEE APPLICATION ATTACHED

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description

March 31st

Statement 9 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description

Scholarships are awarded to students of Southington High School. Also, awards have been made to local students attending private secondary schools and to prior awardees during their college years. Donations are made to qualifying charities.

7411 The Reuben E. Thalberg Foundation	3034447	FYE: 11/30/2009
7411 Th	06-6034447	FYE: 11/

Federal Statements

Statement 10 - Form 990-PF. Part XV. Line 3b - Grants and Contributions Approved for	

Name	Address			
Address	Relationship	Status	Purpose	Amount
Brandeis University	Donation			
Southern CT Hebrew Academ				
Yale-New Haven Hospital	Donation			1 N N N N N N N N N N N N N N N N N N N
	Donation			25,000
кгізтеп мигрлу	Scholarship			1,200
Rabea Hamed	Scholarship			2,500
Total				30,700

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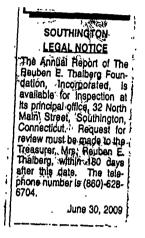
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Record-Journal

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AFFIDAVIT OF PUBLICATION

THIS IS TO CERTIFY that the attached clipping is a true copy of a notice published in the RECORD-JOURNAL JULY 3, 2009.



The Record-Journal Publishing Company

State of Connecticut

SS. Meriden

County of New Haven r

The foregoing affidavit was signed and sworn before me this 10, day of JULY 2009.

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Pam Adamski, Office Manager

Angela Grabiec

Notary Public My Commission Expires June 30, 2013

THE REUBEN THALBERG FOUNDATION, INCORPORATED

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32 N. MAIN STREET, P.O. BOX 272 SOUTHINGTON, CONN. 06489

Established in 1954

by

Dr. Reuben E. Thalberg

Scholarship Application

This application must be returned to the Foundation no later than April 17, 20 application <u>will not</u> be considered.

An incomplete

The Reuben E. Thalberg Foundation P.O. Box 272 Southington, CT 06489

THE REUBEN E. THALBER

Scholarshi

(Please Type of Print)				
Student's full name	······			
Student's address		·····		
D	(Sireet)	(Cuy)	(State)	(Zıp Cade)
Date and place of birth	······			<u></u>
Senior High School		ress of or High School		
I. Expected Graduating date	Num Grac	iber in Juating Class	Rank in Class	
Scores in CEEB Scholastic Aptitud	le Test or in American C	ollege Test		
Scholastic Average				
2. Honors and Awards (please list chi	onologically and give da	tes received):		
		·····		
		·····		
 Participation in extra-curricular ac give dates): 				
	·			
	···· -······			<u></u>
			······································	
4. Personal and civic activities conduc	ted out of school (offices	s held, awards, etc.) (pl	ease list chronologically and g	ive dates):
· · · · · · · · · · · · · · · · · · ·				
		•		
 Employment (please list periods of e periods): 	mployment chronologica	lly, giving dates, and sh	owing average time employed	each week during such
	· · _ · _ · · · · · · · · · · · · ·			······
				·····
Miscellaneous — other activities sur university study — please identify h indicate what your plans are for a c	ere the major academic i	obbies, or additional int nterests which you will	formation relevant to activities pursue at the college or unive	s; plans for college or rsity level. If possible,
	· <u>·····</u>			
		·····		

INDATION, INCORPORATED

pplication

7. Please list other scholarships applied for, and identify those which you have already been awarded:

Colleges or institutions applied to:	Accepted	Rejected	Have not heard
1		. <u></u>	
2		. <u> </u>	
3		· · · · · · · · · · · · · · · · · · ·	
4		·	
Which is your first choice? Seco	ond choiœ?		
Prospective Major Course dura	tion	_ ``	

10. Educational History The applicants should describe briefly and in narrative form on a separate sheet of paper not to exceed 200 words the development of his or her educational interests from the time of entry to high school until the date of this application. Here the applicant should identify subjects of special interest, scholastic achievements, and other qualifications which might bear upon this particular award.

11. List number of children in household.

12. List names and ages of children in household.

13. List financial obligations (tuition, fees, room & board) now being incurred for other members of the family.

14. Educational status of children at time of application.

(Signature of Applicant)

One recent black and white photo must accompany this application, (not a snapshot).

The information submitted on this form and attached hereto has been examined by me, and I hereby certify that the facts therein are true

(Date)

•		PART I	
STUDENT'S PROPOSED BUDGE	T (list on an annual basis)		
Resources	_	Cost	_
Savings	\$		\$
Summer Earnings	\$		\$
Earnings during year	\$	- Board	\$
Veteran's benefits	\$	- Room	S
Aid from parents	\$	- Clothing	\$
Aid from other sources (loans, grants, scholarships, etc.)	\$		\$
Other (specify)	\$	Personal recreation	\$
Total Resources	S	Other (specify)	\$
lf you own an automobile,		Total Costs	\$
give year and make		_ Amount of indebtedness on automobile	\$
Other indebtedness			
Explain any unusual circumstances et		above items:	
Explain any unusual circumstances of	onnected with any of the a	above items:	
Explain any unusual circumstances of TO BE FILLED IN BY PARENTS (Father (or Guard	onnected with any of the a OR GUARDIANS dian)	above items: RT II Mother (Maide	n Name)
Explain any unusual circumstances explain any unusual circumstances explain any unusual circumstances explain any of the second state of the secon	onnected with any of the a OR GUARDIANS dian)	above items: RT II Mother (Maide Name	n Name)
Explain any unusual circumstances explain any unusual circumstances explain any unusual circumstances explain any explain explain any expl	onnected with any of the a OR GUARDIANS dian)	above items: RT II Mother (Maide Name Home Address	n Name)
Explain any unusual circumstances explain any explain	onnected with any of the a BA OR GUARDIANS dian)	above items: RT II Mother (Maide Name	n Name)
Explain any unusual circumstances ex FO BE FILLED IN BY PARENTS (Father (or Guard iame(iome Address((Cny) (Zeer)	onnected with any of the a OR GUARDIANS dian) (State)	above items:	n Name) (Street)
Explain any unusual circumstances ex FO BE FILLED IN BY PARENTS (Father (or Guard lame lome Address (1) (Cny) (Zeee) Employer or Firm	OR GUARDIANS fian) (State)	above items:	n Name) (Siret) (Sist)
Explain any unusual circumstances ex FO BE FILLED IN BY PARENTS (Father (or Guard Name	onnected with any of the a OR GUARDIANS dian) (State)	above items:	n Name) (Street) (State)
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Explain any unusual circumstances explain any unusual circumstances explained by parents of Father (or Guard Same	OR GUARDIANS PA OR GUARDIANS (Sume) (Sume) Sume Sume Sume Sume Sume Sume Sume Sume	above items:	n Name) (Silvert) (Silvert) Yrs. in Firm \$
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Explain any unusual circumstances ex TO BE FILLED IN BY PARENTS (Father (or Guard Name	onnected with any of the s OR GUARDIANS fian) town (Sum) Yrs. in Firm S S or indebtedness:	above items:	n Name) (Street) (Street) (Street)
Explain any unusual circumstances ex TO BE FILLED IN BY PARENTS (Father (or Guard Name	onnected with any of the s OR GUARDIANS fian) town (Sum) Yrs. in Firm S S or indebtedness:	above items:	n Name) (Street) (Street) (Street)

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Applicant must attach three letters of recommendation. Two from teachers and one from an individual other than a teacher. Transcript must accompany application.

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