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Part II

Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1Cash—non-interest-bearing	9,918	7,921	7,921
	2Savings and temporary cash investments	845	1,584	1,584
	3Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5Grants receivable			
	6Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8Inventories for sale or use			
	9Prepaid expenses and deferred charges			
	10aInvestments—U S and state government obligations (attach schedule)			
	bInvestments—corporate stock (attach schedule)	33,717	30,550	230,416
	cInvestments—corporate bonds (attach schedule)			
	11Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12Investments—mortgage loans			
	13Investments—other (attach schedule)	2,192,795	2,172,684	2,075,761
	14Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15Other assets (describe ▶ _____)			
	16Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,237,275	2,212,739	2,315,682
	17Accounts payable and accrued expenses			
	18Grants payable			
	19Deferred revenue			
	20Loans from officers, directors, trustees, and other disqualified persons			
	21Mortgages and other notes payable (attach schedule)			
	22Other liabilities (describe ▶ _____)			
	23Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24Unrestricted	2,237,275	2,212,739	
	25Temporarily restricted			
	26Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27Capital stock, trust principal, or current funds			
	28Paid-in or capital surplus, or land, bldg , and equipment fund			
	29Retained earnings, accumulated income, endowment, or other funds			
	30Total net assets or fund balances (see the instructions)	2,237,275	2,212,739	
	31Total liabilities and net assets/fund balances (see the instructions)	2,237,275	2,212,739	

Part III

Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	2,237,275
2	Enter amount from Part I, line 27a	2	-24,536
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	2,212,739
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,212,739

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	CORNING INC	D		
b	INCOME FUND OF AMERICA	P		
c	NEW PERSPECTIVE	P		
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 25,033		3,167	21,866
b 74,335		102,926	-28,591
c 69,156		45,100	24,056
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			21,866
b			-28,591
c			24,056
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	17,331
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8	3	

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If “Yes,” the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2007	200,815	2,950,850	0 068053
2006	216,088	2,791,672	0 077405
2005	137,232	2,561,547	0 053574
2004	325,083	2,501,465	0 129957
2003	136,003	2,465,637	0 055159

2 Total of line 1, column (d).	2	0 384148
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 076830
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5.	4	1,982,339
5 Multiply line 4 by line 3.	5	152,303
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	1,474
7 Add lines 5 and 6.	7	153,777
8 Enter qualifying distributions from Part XII, line 4.	8	160,737

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see the instructions)							
1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		1	1,474				
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 here ☒ and enter 1% of Part I, line 27b							
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		2	0				
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)							
3 Add lines 1 and 2.				3	1,474		
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)						4	0
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	1,474				
6 Credits/Payments							
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a			5,547			
b Exempt foreign organizations—tax withheld at source	6b						
c Tax paid with application for extension of time to file (Form 8868)	6c						
d Backup withholding erroneously withheld	6d						
7 Total credits and payments Add lines 6a through 6d.		7	5,547				
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8					
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ☐		9					
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ☐		10	4,073				
11 Enter the amount of line 10 to be Credited to 2009 estimated tax ☐ 4,073 Refunded ☐		11	0				

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

Part VII-A

Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11a		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Web site address  www.xericfoundation.org				
14	The books are in care of  Kendall Clark Engelman Telephone no  (413) 585-0671			
	Located at  351 Pleasant Street PMB 214 Northampton MA ZIP+4  01060			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here  			
	and enter the amount of tax-exempt interest received or accrued during the year  15			

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes  No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  Yes  No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes  No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes  No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  Yes  No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).  Yes  No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? 	1b		No
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 2008?	1c		No
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 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008?  Yes  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 the instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  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  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.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

(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
Peter A Laird	President	0	0	0
C/O Mirage Studios Northampton, MA 01060	2 00			
Christopher B Milne	Vice President	0	0	0
C/O Gage-Wiley Inc Northampton, MA 01060	2 00			
Kendall Clark Engelman	Secretary/Treasurer	24,000	0	0
C/O Mirage Studios Northampton, MA 01060	20 00			

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Part VIII Information About Officers and Contractors Continued

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services.	0
--	---

Part IX-A Summary of Direct Charitable Activities

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

1 The foundation offers assistance to 501(c)(3) charities from the western massachusetts, area code 413, area Grants are usually limited to \$5,000 per charity	67,500
2 The foundation offers financial assistance to self-publishing comic creators in furtherance of the arts Grants are limited to direct expense reimbursements to the comics	68,137
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
--	--------

1	
2	
All other program-related investments See the instructions	
3	

Total Add lines 1 through 3.	0
---	---

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	1,999,402
b	Average of monthly cash balances.	1b	13,125
c	Fair market value of all other assets (see the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,012,527
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	2,012,527
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see the instructions).	4	30,188
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,982,339
6	Minimum investment return. Enter 5% of line 5.	6	99,117

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	99,117
2a	Tax on investment income for 2008 from Part VI, line 5.	2a	1,474
b	Income tax for 2008 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,474
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	97,643
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	97,643
6	Deduction from distributable amount (see the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	97,643

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	160,737
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	160,737
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	1,474
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	159,263

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII

Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				97,643
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2008				
a From 2003.				14,505
b From 2004.				203,504
c From 2005.				12,989
d From 2006.				81,354
e From 2007.				60,667
f Total of lines 3a through e.	373,019			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 160,737				
a Applied to 2007, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see the instructions). . . .		0		
c Treated as distributions out of corpus (Election required—see the instructions).	0			
d Applied to 2008 distributable amount.				97,643
e Remaining amount distributed out of corpus	63,094			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	436,113			
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.				
d Subtract line 6c from line 6b Taxable amount—see the instructions.		0		
e Undistributed income for 2006 Subtract line 4a from line 2a Taxable amount—see the instructions.			0	
f Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2008.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see the instructions).	0			
8 Excess distributions carryover from 2002 not applied on line 5 or line 7 (see page 27 of the instructions).	14,505			
9 Excess distributions carryover to 2008. Subtract lines 7 and 8 from line 6a.	421,608			
10 Analysis of line 9				
a From 2004.				203,504
b From 2005.				12,989
c From 2006.				81,354
d From 2007.				60,667
e From 2008.				63,094

Part XIVPrivate Operating Foundations (see the instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2008	(b) 2007	(c) 2006	(d) 2005	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see the instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

Peter A Laird

b

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

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the organization only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the organization makes gifts, grants, etc. (see the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number of the person to whom applications should be addressed

Xeric Foundation
351 Pleasant Street PMB 214
Northampton, MA 01060
(413) 585-0671

b

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

Western Mass 501(c)(3) charities and any self publishing comic may submit a written request, no special application form is necessary. Complete details can be obtained @ www.xericfoundation.org

c

Any submission deadlines

Charities - January 31 for March 1 review

d

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

501(c)(3) charities must be in western Massachusetts 413 area code. Requests generally should not exceed \$5,000.

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Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	135,637
b Approved for future payment See Additional Data Table				
Total			3b	23,303

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	131,163	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
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			18	17,331	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). .		0		148,494	0
13 Total. Add line 12, columns (b), (d), and (e). 13					148,494

[illegible]

Part XVII

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

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting organization to a noncharitable exempt organization of

1

Cash.

1a(1)

No

2

Other assets.

1a(2)

No

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

1b(1)

No

2

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

3

Rental of facilities, equipment, or other assets.

1b(3)

No

4

Reimbursement arrangements.

1b(4)

No

5

Loans or loan guarantees.

1b(5)

No

6

Performance of services or membership or fundraising solicitations.

1b(6)

No

c

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

1c

No

d

If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting organization. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐

Yes

☒

No

b

If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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

Signature of officer or trustee

2010-01-26

Date

Title

Paid Preparer's Use Only

Preparer's Signature

ROBERT SUPRENANT

Date

Check if self-employed ☒

Preparer's SSN or PTIN (See **Signature** in the instructions.)

Firm's name (or yours if self-employed), address, and ZIP code

MORIARTY & PRIMACK PC
ONE MONARCH PLACE SUITE 1300
SPRINGFIELD, MA 010444011

EIN

Phone no

(413) 739-1800

Form 990-PF (2008)

Additional Data

Software ID: 08000094
Software Version: 2008.05030
EIN: 22-3149258
Name: XERIC FOUNDATION

Form 990PF Part XV Line 3a - Grants and Contributions Paid During the Year

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ARTSPACE COMMUNITY ARTS CENTER 15 MILL STREET GREENFIELD,MA 01301	NONE	501 (C)(3)	GREEN RIVER CONNECTION	2,000
ELMS COLLEGE 291 SPRINGFIELD STREET CHICOPEE,MA 010132839	NONE	501 (C)(3)	STANDING ON THE FOUNDATION OF SUCCESS	3,000
ERIC CARLE MUSEUM OF PICTURE BOOK ART INC 125 WEST BAY ROAD AMHERST,MA 01002	NONE	501 (C)(3)	JEANNINE ATKINS CONTRIBUTION	2,500
FIRST CONGREGATIONAL CHURCH PO BOX 247 WHATELY,MA 01093	NONE	501 (C)(3)	GENERAL CONTRIBUTION	3,000
FRANKLIN LAND TRUST WHATELY FUND PO BOX 450 SHELBURNE FALLS,MA 01370	NONE	501 (C)(3)	JEANNINE ATKINS CONTRIBUTION	5,000
GARY SCOTT BEATTY1509 PRINCETON RD MUSKEGON,MI 49441	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	347
GIRLS INC PO BOX 6812 HOLYOKE,MA 01040	NONE	501 (C)(3)	TEEN CTR PROJECT	1,000
JACOB'S PILLOW DANCE FESTIVAL INC 358 GEORGE CARTER ROAD BECKET,MA 01223	NONE	501 (C)(3)	COMMUNITY DAY	2,000
JASON HOFFMAN1914 EUTAW PL BALTIMORE,MD 21217	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	4,128
JONES LIBRARY 43 AMITY STREET AMHERST,MA 01002	NONE	501 (C)(3)	JEANNINE ATKINS CONTRIBUTION	2,500
LILLY LIBRARY 19 MEADOW STREET FLORENCE,MA 01062	NONE	501 (C)(3)	SUMMER CHILDREN'S PROGRAM	2,000
NORTHAMPTON CENTER FOR THE ARTS 17 NEW SOUTH STREET NORTHAMPTON,MA 01060	NONE	501 (C)(3)	YOUNG PEOPLE'S PERF ARTS SERIES	2,000
NORTHAMPTON SURVIVAL CENTER INC 265 PROSPECT STREET NORTHAMPTON,MA 01060	NONE	501 (C)(3)	KIDS SUMMER MEAL PROGRAM	5,000
READER TO READER INC 24 MT VIEW CIRCLE AMHERST,MA 01002	NONE	501 (C)(3)	BOOKS	3,000
STEF LENK1708 QUEEN ST WEST TORONTO ONTM6R CA	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	1,204
Total  3a				135,637

Form 990PF Part XV Line 3a - Grants and Contributions Paid During the Year

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
THE FOOD BANK PO BOX 160 HATFIELD,MA 01038	NONE	501 (C)(3)	DOOR TO DOOR	5,000
UMASS ENGLISH DEPT OPPORTUNITY FUND RECORD GIFT PROCESSING MEMORIAL HALL 134 HICK WAY UMASS AMHERST,MA 010039270	NONE	501 (C)(3)	JEANNINE ATKINS TO HONOR PROF JOHN CLAYTON	5,000
WILLISTON NORTHAMPTON SCHOOL ANNUAL FUND 19 PAYSON AVENUE EASTHAMPTON,MA 01027	NONE	501 (C)(3)	JEANNINE ATKINS AND PETER LAIRD CONTRIBUTION	500
DAVE KIERSH62 MARY ST ARLINGTON,MA 02474	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	5,000
EROYN FRANKLIN203 BELMONT AVE SEATTLE,WA 98102	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	4,276
FELIX TANNENBAUM1410 MARION ST DENVER,CO 80218	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	4,300
JACK HSU3460 TILDEN AVE LOS ANGELES,CA 90064	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	5,405
JENNY JAECKEL2030 KITCHENER ST VANCOUVER V5L2W8 CA	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	4,479
JOON HO ALEX KIM173 SOUTH MAIN ST WHITE RIVER JUCTION,VT 05001	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	7,390
JUSTIN MURPHY2127 TRAILWOOD DR ORANGE PARK,FL 32003	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	5,000
MAREK BENNET93 BENNETT RD HENNIKER,NH 03242	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	2,878
CENTER FOR CANCER FUND PO BOX 1801 LITCHFIELD,CT 06759	NONE	501 (C)(3)	JEANNINE ATKINS AND PETER LAIRD CONTRIBUTION	2,500
DICKINSON MEMORIAL LIABRARY PO BOX 187 WHATELY,MA 01093	NONE	501 (C)(3)	GENERAL CONTRIBUTION	500
NORTHAMPTON COMMUNITY MUSIC CENTER 139 SOUTH STREET NORTHAMPTON,MA 01060	NONE	501 (C)(3)	SCHOLARSHIPS	2,000
WHOLE CHILDREN INC 8 RIVER DRIVE HADLEY,MA 01035	NONE	501 (C)(3)	GENERAL CONTRIBUTION	500
Total  3a				135,637

Form 990PF Part XV Line 3a - Grants and Contributions Paid During the Year

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ENCHANTED CIRCLE THEATER 4 OPEN SQUARE WAY HOLYOKE,MA 01040	NONE	501 (C)(3)	SO JOURNER TRUTH	3,500
MARY LYON EDUCATION FUND INC PO BOX 184 SHELBURNE FALLS,MA 01370	NONE	501 (C)(3)	A TALE OF TWO VILLAGES	1,500
THE SHEA COMMUNITY THEATER 71 AVENUE A TURNERS FALLS,MA 01376	NONE	501 (C)(3)	OPEN ACCESS THE ARTS	2,000
SAFE PASSAGE 43 SENTER ST NORTHAMPTON,MA 01060	NONE	501 (C)(3)	VOLUNTEER PROGRAM	4,000
THE ACADEMY AT CHARLEMONT 1359 ROUTE 2 CHARLEMONT,MA 01339	NONE	501 (C)(3)	FINANCIAL AID PROGRAM	1,000
CENTER FOR HUMAN DEVELOPMENT 332 BIRNIE AVE SPRINGFIELD,MA 01107	NONE	501 (C)(3)	MURAL PROJECT	4,000
GREATER SPRINGFIELD HABITAT FOR HUMANITY 33 ELLIOT ST SPRINGFIELD,MA 01105	NONE	501 (C)(3)	SPRINGFIELD HOME CONSTRUCTION	2,500
BRIAN BROWN315 S 45TH ST PHILADELPHIA,PA 19104	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	3,199
JONATHAN YOST153 AVENUE B NEW YORK,NY 10009	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	4,365
SOPHIA WEIDMAN557 W 1438TH ST NEW YORK,NY 10031	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	2,100
HARTLEY LYN546 MANNING AVE TORONTO ONTM6R CA	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	3,894
ANNIE MURPHY121 NE BUFFALO ST PORTLAND,OR 97211	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	3,750
ED CHOY MOORMAN101 E 25 ST MINNEAPOLIS,MN 55404	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	3,920
ADAM BOURRET46 CONCORD AVE TORONTO ONTM6R CA	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	2,502
Total  3a				135,637

Form 990PF Part XV Line 3b - Grants and Contributions Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
b <i>Approved for future payment</i>				
ANNIE MURPHY121 NE BUFFALO ST PORTLAND,OR 97211	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	1,099
BRIAN BROWN315 S 45TH ST PHILADELPHIA,PA 19104	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	526
ED CHOY MOORMAN101 E 25 ST MINNEAPOLIS,MN 55404	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	1,072
HARTLEY LYN546 MANNING AVE TORONTO ONTM6R CA	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	1,106
TIMOTHY GODEK809 LINCOLN ST WOOSTER,OH 44691	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	6,000
JOE BORUCHOW921 W RITNER ST PHILADELPHIA,PA 19148	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	4,250
JOSHUA SMEATON3902 PENROD LANE VALRICO,FL 33596	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	4,250
ADAM HINES270 W ELMWOOD BURBANK,CA 91502	NONE	SELF PUBLISHING COMI	UNDERWRITER EXPENSES	5,000
Total ▶ 3b				23,303

TY 2008 Accounting Fees Schedule

Name: XERIC FOUNDATION

EIN: 22-3149258

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Professional Fees	2,200	1,100		1,100

**TY 2008 Investments Corporate
Stock Schedule**

Name: XERIC FOUNDATION
EIN: 22-3149258

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORNING INC	30,550	230,416

TY 2008 Investments - Other Schedule**Name:** XERIC FOUNDATION**EIN:** 22-3149258

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
America Mutual Fund	AT COST	266,561	234,941
Income Fund of America	AT COST	1,175,134	1,025,097
New Perspective	AT COST	730,989	815,723

TY 2008 Other Expenses Schedule

Name: XERIC FOUNDATION

EIN: 22-3149258

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Insurance	475	0		0
Dues & Fees	2,218	0		0
Miscellaneous	1,125	0		0
Office Supplies	239	0		0
Postage	665	0		0
Telephone	804	0		0

TY 2008 Taxes Schedule

Name: XERIC FOUNDATION

EIN: 22-3149258

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal Taxes	5,667	0		0