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

2008

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

For calendar year 2008, or tax year beginning OCT 1, 2008, and ending SEP 30, 2009

G Check all that apply ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

Use the IRS label  
Otherwise, print or type.  
See Specific Instructions.

Name of foundation  
**THE LALOR FOUNDATION, INC.**

Number and street (or P O box number if mail is not delivered to street address) Room/suite  
**C/O GMA FOUNDATIONS 77 SUMMER ST., 8TH FLOOR**

City or town, state, and ZIP code  
**BOSTON, MA 02110**

A Employer identification number  
**51-6000153**

B Telephone number  
**617-426-7080**

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐  
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization ☒ Section 501(c)(3) exempt private foundation  
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)  
\$ **10,866,048.** (Part I, column (d) must be on cash basis.)

J Accounting method ☐ Cash ☒ Accrual  
☐ Other (specify) \_\_\_\_\_

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received			N/A	
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	322,883.	322,883.		STATEMENT 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	-283,605.			STATEMENT 1
b	Gross sales price for all assets on line 6a	1,903,881.			
7	Capital gain net income (from Part IV, line 2)		0.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss)				
11	Other income	12,390.	7,814.		STATEMENT 3
12	Total. Add lines 1 through 11	51,668.	330,697.		
13	Compensation of officers, directors, trustees, etc	0.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees STMT 4	5,790.	0.		11,673.
c	Other professional fees STMT 5	72,715.	40,213.		34,118.
17	Interest				
18	Taxes STMT 6	588.	2,733.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings	1,126.	0.		1,126.
22	Printing and publications				
23	Other expenses STMT 7	5,386.	0.		5,386.
24	Total operating and administrative expenses. Add lines 13 through 23	85,605.	42,946.		52,303.
25	Contributions, gifts, grants paid	490,121.			339,411.
26	Total expenses and disbursements. Add lines 24 and 25	575,726.	42,946.		391,714.
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	-524,058.			
b	Net investment income (if negative, enter -0-)		287,751.		
c	Adjusted net income (if negative, enter -0-)			N/A	

pm

**Part II Balance Sheets**

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

		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
<b>Assets</b>	1 Cash - non-interest-bearing	81,534.	16,145.	16,145.	
	2 Savings and temporary cash investments	580,900.	873,945.	873,945.	
	3 Accounts receivable ▶ 7,472.				
	Less: allowance for doubtful accounts ▶	11,477.	7,472.		
	4 Pledges receivable ▶				
	Less: allowance for doubtful accounts ▶				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ▶				
	Less: allowance for doubtful accounts ▶				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges		21,544.		
	10a Investments - U.S. and state government obligations STMT 8	253,352.	0.	0.	
	b Investments - corporate stock STMT 9	7,973,233.	6,870,055.	6,870,055.	
	c Investments - corporate bonds STMT 10	2,258,661.	2,368,438.	2,368,438.	
<b>Liabilities</b>	11 Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶				
	12 Investments - mortgage loans				
	13 Investments - other STMT 11	517,185.	737,465.	737,465.	
	14 Land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶				
	15 Other assets (describe ▶)				
	16 <b>Total assets (to be completed by all filers)</b>	11,676,342.	10,895,064.	10,866,048.	
	17 Accounts payable and accrued expenses	13,415.	5,959.		
	18 Grants payable	62,385.	213,095.		
<b>Net Assets or Fund Balances</b>	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ▶ DEFERRED EXCISE TAX)	35,700.	27,800.		
	23 <b>Total liabilities (add lines 17 through 22)</b>	111,500.	246,854.		
<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/>	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/>	27 Capital stock, trust principal, or current funds	11,564,842.	10,648,210.	
		28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
		29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
		30 <b>Total net assets or fund balances</b>	11,564,842.	10,648,210.	
	31 <b>Total liabilities and net assets/fund balances</b>	11,676,342.	10,895,064.		

**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	11,564,842.
2 Enter amount from Part I, line 27a	2	-524,058.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	11,040,784.
5 Decreases not included in line 2 (itemize) ▶ UNREALIZED LOSS ON INVESTMENTS	5	392,574.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	10,648,210.

**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.)
<b>1a PUBLIC TRADED SECURITIES</b>				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a 1,903,881.		2,187,486.	-283,605.	
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a			-283,605.	
b				
c				
d				
e				
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	-283,605.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 }			3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2007	279,878.	12,785,376.	.021890
2006	457,660.	13,097,962.	.034941
2005	807,180.	12,331,589.	.065456
2004	853,933.	12,263,800.	.069630
2003	921,690.	12,502,106.	.073723
2 Total of line 1, column (d)			2 .265640
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 .053128
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5			4 9,438,749.
5 Multiply line 4 by line 3			5 501,462.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 2,878.
7 Add lines 5 and 6			7 504,340.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions			8 391,714.

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	5,755.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	5,755.
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	5,755.
6 Credits/Payments			
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a	13,227.	
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	13,227.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	7,472.	
11 Enter the amount of line 10 to be Credited to 2009 estimated tax	11	0.	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>DE, MA</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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**Part VII-A Statements Regarding Activities** (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		x
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		x
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	x	

Website address **WWW.LALORFOUND.ORG**

14 The books are in care of **GMA FOUNDATIONS** Telephone no **617-426-7080**  
 Located at **77 SUMMER STREET, 8TH FLOOR, BOSTON, MA** ZIP+4 **02110**

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** N/A

**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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b 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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	x
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	x
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <b>N/A</b>		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	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 <b>N/A</b>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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.) <b>N/A</b>	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

**Part VII-B** Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

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

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

6b

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If you answered "Yes" to 6b, also file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 12		0.	0.	0.

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

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

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

0

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**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	9,521,150.
b	Average of monthly cash balances	1b	48,562.
c	Fair market value of all other assets	1c	12,774.
d	<b>Total</b> (add lines 1a, b, and c)	1d	9,582,486.
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	9,582,486.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	143,737.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	9,438,749.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	471,937.

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	471,937.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	5,755.
b	Income tax for 2008 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	5,755.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	466,182.
4	Recoveries of amounts treated as qualifying distributions	4	4,576.
5	Add lines 3 and 4	5	470,758.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	470,758.

**Part XII Qualifying Distributions** (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	391,714.
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	391,714.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	391,714.

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

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				470,758.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2008				
a From 2003	35,114.			
b From 2004	240,768.			
c From 2005	215,007.			
d From 2006				
e From 2007				
f Total of lines 3a through e	490,889.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$	391,714.			
a Applied to 2007, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2008 distributable amount				391,714.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a))	79,044.			79,044.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	411,845.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2007 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2008 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2009				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	411,845.			
10 Analysis of line 9				
a Excess from 2004	196,838.			
b Excess from 2005	215,007.			
c Excess from 2006				
d Excess from 2007				
e Excess from 2008				

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

N/A

- 1 a 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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

- 2 a 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 XV Supplementary Information** (Complete this part only if the foundation 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) )

NONE

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

NONE

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

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see 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

THE LALOR FOUNDATION, INC. C/O GMA FOUNDATIONS, 617-426-7080

77 SUMMER STREET, 8TH FLOOR, BOSTON, MA 02110

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

SEE ATTACHED

- c Any submission deadlines

SEE ATTACHED

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

SEE ATTACHED

**Part XV** **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
SEE STATEMENT 13				
Total			▶ 3a	339,411.
b <i>Approved for future payment</i>				
Total SEE STATEMENT 14			▶ 3b	213,095.

**Part XVI-A Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue					
a N/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	322,883.	
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	-283,605.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a GRANT REFUND					4,576.
b SECURITY LITIGATION PROCEEDS			18	7,814.	
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		47,092.	4,576.
13 Total. Add line 12, columns (b), (d), and (e)				13	51,668.

(See worksheet in line 13 instructions to verify calculations )

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

[illegible]



FORM 990-PF	GAIN OR (LOSS) FROM SALE OF ASSETS	STATEMENT	1
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(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD	
PUBLIC TRADED SECURITIES				
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,903,881.	2,187,486.	0.	0.	-283,605.

CAPITAL GAINS DIVIDENDS FROM PART IV	0.
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TOTAL TO FORM 990-PF, PART I, LINE 6A	-283,605.
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FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	2
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDEND AND INTEREST INCOME	322,883.	0.	322,883.
TOTAL TO FM 990-PF, PART I, LN 4	322,883.	0.	322,883.

FORM 990-PF	OTHER INCOME	STATEMENT	3
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
GRANT REFUND	4,576.	0.	
SECURITY LITIGATION PROCEEDS	7,814.	7,814.	
TOTAL TO FORM 990-PF, PART I, LINE 11	12,390.	7,814.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	5,790.	0.		11,673.
TO FORM 990-PF, PG 1, LN 16B	5,790.	0.		11,673.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY	40,213.	40,213.		0.
GRANT MANAGEMENT	32,502.	0.		34,118.
TO FORM 990-PF, PG 1, LN 16C	72,715.	40,213.		34,118.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX AND EXCISE TAX	588.	2,733.		0.
TO FORM 990-PF, PG 1, LN 18	588.	2,733.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INSURANCE	1,200.	0.		1,200.
TELEPHONE AND OFFICE				
SUPPLIES	752.	0.		752.
CORPORATE FEES	90.	0.		90.
MEMBERSHIP	495.	0.		495.
POSTAGE & DELIVERY	399.	0.		399.



GRANT COMMITTEE	2,200.	0.	2,200.
FILING FEE	250.	0.	250.
TO FORM 990-PF, PG 1, LN 23	5,386.	0.	5,386.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	x		0.	0.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			0.	0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	6,870,055.	6,870,055.
TOTAL TO FORM 990-PF, PART II, LINE 10B	6,870,055.	6,870,055.

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	2,368,438.	2,368,438.
TOTAL TO FORM 990-PF, PART II, LINE 10C	2,368,438.	2,368,438.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	COST	737,465.	737,465.
TOTAL TO FORM 990-PF, PART II, LINE 13		737,465.	737,465.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT 12
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
LALOR BURDICK C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	SECRETARY AND	TREASURER		
	1.00	0.	0.	0.
CAROL CHANDLER C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	TRUSTEE			
	0.50	0.	0.	0.
CYNTHIA PATTERSON C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	PRESIDENT			
	0.50	0.	0.	0.
SALLY ZECKHAUSER C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	VICE-PRESIDENT			
	0.50	0.	0.	0.
ANDREW BRAUN C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	TRUSTEE			
	0.50	0.	0.	0.
CHRISTOPHER BURDICK C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	TRUSTEE			
	0.50	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 13

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
MABEL WADSWORTH WOMEN'S HEALTH CENTER P.O. BOX 918 , BANGOR, ME 04402	NONE SEXUALITY & HEALTH EDUCATION PROGRAM	PUBLIC CHARITY	23,350.
UNIVERSITY OF NORTH TEXAS HEALTH CENTER AT FORT WORTH 3500 CAMP BOWIE BOULEVARD FORT WORTH, TX 76107	NONE FOR HER HEALTH EDUCATION RESEARCH PROGRAM	PUBLIC CHARITY	37,020.
PLANNED PARENTHOOD ASSOCIATION OF YAKIMA COUNTY D/B/A PLANNED PARENTHOOD OF 1117 TIETON DRIVE, YAKIMA, WA 98902	NONE PROMOTORAS COMUNITARIAS - CELEBRANDO LA SALUD/COMMUNITY HEALTH	PUBLIC CHARITY	17,385.
RED HOOK INITIATIVE, INC., 595 CLINTON STREET, BROOKLYN, NY 11231	NONE PEER HEALTH EDUCATOR AND LEADERSHIP PROGRAM REPLICATION PROJECT	PUBLIC CHARITY	35,000.
TEMPLE UNIVERSITY D/B/A/ TEMPLE HEALTH CONNECTION 3307 NORTH BROAD STREET, PHILADELPHIA, PA 19140	NONE REPRODUCTIVE HEALTH AND THE GIRL UNIT	PUBLIC CHARITY	10,000.
JOHNS HOPKINS U. SCHOOL OF PUBLIC HEALTH 617 NORTH WOLFE STREET , BALTIMORE, MD 21205	NONE FELLOWSHIP PROGRAM	PUBLIC CHARITY	9,656.
KANSAS U. MEDICAL CENTER RES. INST. INC. 3901 RAINBOW BLVD., MSN 1039 , KANSAS CITY, KS 66160	NONE FELLOWSHIP PROGRAM	PUBLIC CHARITY	30,000.

OREGON HEALTH & SCIENCE UNIVERSITY 2525 SW 1ST AVENUE, SUITE 220 , PORTLAND, OR 97201	NONE  FELLOWSHIP PROGRAM	PUBLIC CHARITY	30,000.
PRINCE HENRY'S INSTITUTE, P.O. BOX 5152 CLAYTON VIC,	NONE  FELLOWSHIP PROGRAM	PUBLIC CHARITY	30,000.
THE REGENTS OF THE UNIVERSITY OF CALIFORNIA 3333 CALIFORNIA STREET, SUITE 315, SAN FRANCISCO, CA 94143	NONE  FELLOWSHIP PROGRAM	PUBLIC CHARITY	33,000.
SMITHSONIAN INSTITUTION, 2411 NETWORK PLACE , CHIC	NONE  FELLOWSHIP PROGRAM	PUBLIC CHARITY	30,000.
STANFORD UNIVERSITY, RESEARCH MANAGEMENT GROUP 301 RAVENSWOOD AVE., MANLO PA	NONE  FELLOWSHIP PROGRAM	PUBLIC CHARITY	30,000.
AMERICAN SOCIETY OF ANDROLOGY, 11 E. WOODFIELD ROAD, SUITE 520, SCHAUMBURN,	NONE  TRAVEL GRANT PROGRAM	PUBLIC CHARITY	5,000.
COLD SPRINGS HARBOR LABORATORY, 1 BUNGTOWN ROAD, P.O. BOX 200, COLD SPRINGS	NONE  TRAVEL GRANT PROGRAM	PUBLIC CHARITY	500.
GORDON RESEARCH CONFERENCES, P.O. BOX 984 , WEST KINGSTON, RI 02892	NONE  TRAVEL GRANT PROGRAM	PUBLIC CHARITY	9,000.
KEYSTONE SYMPOSIUM , 221 SUMMIT PLACE #272, P.O. BOX 1630 , SILVERTHRONE, C	NONE  TRAVEL GRANT PROGRAM	PUBLIC CHARITY	2,500.

SOCIETY FOR THE STUDY OF                      NONE  
REPRODUCTION  
1619 MONROE STREET     , MADISON,     TRAVEL GRANT PROGRAM  
WI 53711-2063

PUBLIC  
CHARITY                      7,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

339,411.

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
APPROVED FOR FUTURE PAYMENT

STATEMENT 14

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
KANSAS U. MEDICAL CENTER RES. INST. INC. 3901 RAINBOW BLVD., MSN 1039 , KANSAS CITY, KS 66160	NONE  FELLOWSHIP PROGRAM	PUBLIC CHARITY	5,000.
PRINCE HENRY'S INSTITUTE, P. O. BOX 5152 CLAYTON VIC,	NONE  FELLOWSHIP PROGRAM	PUBLIC CHARITY	5,000.
OREGON HEALTH & SCIENCE UNIVERSITY 2525 SW 1ST AVENUE, SUITE 220 , PORTLAND, OR 97201	NONE  FELLOWSHIP PROGRAM	PUBLIC CHARITY	5,000.
SMITHSONIAN INSTITUTION, 2411 NETWORK PLACE , CHIC	NONE  FELLOWSHIP PROGRAM	PUBLIC CHARITY	5,000.
STANFORD UNIVERSITY, RESEARCH MANAGEMENT GROUP 301 RAVENSWOOD AVE., MANLO PA	NONE  FELLOWSHIP PROGRAM	PUBLIC CHARITY	5,000.
THE REGENTS OF THE UNIVERSITY OF CALIFORNIA 3333 CALIFORNIA STREET, SUITE 315, SAN FRANCISCO, CA 94143	NONE  FELLOWSHIP PROGRAM	PUBLIC CHARITY	40,000.
COMMUNITY HOSPITAL HEALTH SERVICES 2615 EAST HIGH STREET, SPRINGFIELD, OH 45505	NONE  ANNA LALOR BURDICK PROGRAM	PUBLIC CHARITY	10,000.
HESPERIAN FOUNDATION, 1919 ADDISON STREET, SUITE 304, BERKELEY, CA 94704	NONE  ANNA LALOR BURDICK PROGRAM	PUBLIC CHARITY	30,000.

MONTACHUSETT OPPORTUNITY COUNCIL, 326 NICHOLS ROAD, FITCHBURG, MA 01420	NONE	PUBLIC CHARITY	43,395.
	ANNA LALOR BURDICK PROGRAM		
NARAL PRO-CHOICE VIRGINIA FOUNDATION PO BOX 1204, ALEXANDRIA, VA 22313	NONE	PUBLIC CHARITY	30,000.
	ANNA LALOR BURDICK PROGRAM		
PCI MEDIA IMPACT, 777 UNITED NATIONS PLAZA, FIFTH FLOOR, NEW YORK, NY 10017	NONE	PUBLIC CHARITY	26,000.
	ANNA LALOR BURDICK PROGRAM		
RESOURCE FOUNDATION, 158 WEST 27TH STREET, 10TH FLOOR, NEW YORK, NY 10001	NONE	PUBLIC CHARITY	5,700.
	ANNA LALOR BURDICK PROGRAM		
SADIE NASH LEADERSHIP PROJECT, 157 MONTAGUE STREET, 4TH FLOOR, BROOKLYN, NY	NONE	PUBLIC CHARITY	2,000.
	ANNA LALOR BURDICK PROGRAM		
GORDON RESEARCH CONFERENCES, P.O. BOX 984, WEST KINGSTON, RI 02892	NONE	PUBLIC CHARITY	1,000.
	TRAVEL GRANT PROGRAM		

TOTAL TO FORM 990-PF, PART XV, LINE 3B

213,095.

## **POSTDOCTORAL FELLOWSHIP PROGRAM HISTORY**

The Lalor Foundation was incorporated in Delaware in 1935 under bequests from members of the Lalor family. One of the foundation's major objectives has been to give assistance and encouragement to capable investigators embarking on teaching and research careers in universities and colleges.

Since its beginning, the foundation has made research grants and awards totaling \$14,036,000 to 1,149 appointees. There have been 568 Lalor Foundation appointments to United States citizens and 581 to other nationals. These include 373 other nationals who did their work in the United States, 40 U.S. scientists for foreign work and 205 foreign scientists for work in their own countries or countries other than the United States.

A majority of the appointees have continued actively in research and occupy academic posts in colleges, hospitals, and universities here and abroad. Since 1960, the foundation has concentrated its assistance on basic research in mammalian reproductive biology as related to the regulation of fertility by providing 700 postdoctoral grants for research in the United States and abroad.

## **MISSION OF THE POSTDOCTORAL FELLOWSHIP PROGRAM**

The Lalor Foundation postdoctoral fellowship program supports promising new researchers in establishing scientific and teaching careers. The mission of the program is to support these researchers early in their work so that they can become independently funded in the field of mammalian reproductive biology as related to the regulation of fertility.

## **GUIDELINES**

### **Eligibility of Institutions and Individuals**

The *institution* must be exempt from federal income taxes under Section 501(c)(3) of the U.S. Internal Revenue Code and must submit a determination letter from the Internal Revenue Service stating that it is "not a private foundation."

If the institution is not located in the United States and has not been classified by the Internal Revenue Service, please contact the fellowship manager at GMA Foundations at the address below.

The *individual* nominated by the applicant institution for the postdoctoral fellowship for conduct of the work may be a citizen of any country. The individual should have training and experience of at least equal to the Ph.D. or M.D. level and should not have a faculty appointment (i.e., instructor, lecturer, or higher). Potential fellows should not have held the doctoral degree more than two years.

The applicant institution may make its nomination of a fellow from among its own personnel or elsewhere, but qualifications being equal, candidates from other than the proposing institution itself may carry modest preference. The application must name the institution's nominee for fellowship and include his or her performance record. Only one application per laboratory/sponsor will be considered.



## **Financial Data**

Grants will be \$35,000 per year for coverage of fellowship stipend, fringes, and institutional overhead. Renewal for one additional year is possible under special circumstances. Please see specific renewal guidelines and application.

Feel free to contact [fellowshipmanager@gmafoundations.com](mailto:fellowshipmanager@gmafoundations.com) with any questions.

## **INSTRUCTIONS FOR POSTDOCTORAL FELLOWSHIP APPLICATION**

**The application form consists of a face sheet and an abstract and budget page, which should be filled out completely and submitted with the 3 Appendices described below. Please see the foundation's website home page ([WWW.LALORFOUND.ORG](http://WWW.LALORFOUND.ORG)) for eligibility details.**

### **SPECIFICATIONS CONCERNING APPLICATIONS**

1. The proposed fellow is responsible to see that the signed, completed application and all supporting information is **RECEIVED by the foundation not later than 5:00 p.m. on January 15, 2010.**
2. The application and all material submitted should be typewritten on 8 1/2" x 11" or A4 paper. Please do not change the font size or margins of the forms provided. The narrative portion of the application should have 1" margins all the way around, except that applicants using A4 paper should leave 1.5" at the bottom of each page. The prospective fellow's name should appear in the upper right hand corner of each page. *Forms are available online, but proposals should be submitted in hard copy.*
3. The application should be accompanied by the applicant's official transcript. The applicant should also complete the NIH Biographical Sketch form.
4. *One original and 4 copies* of the application and accompanying documents should be addressed to the Fellowship Manager, The Lalor Foundation, Inc., c/o GMA Foundations, 77 Summer Street, 8<sup>th</sup> Floor, Boston, MA 02110-1006 USA. Please print double sided whenever possible. Applications should be held by clips or rubber bands, no staples please; folders, report covers, or other types of binders do not fit files and are discarded.
5. Please fill out the face sheet and abstract and budget page. You may type directly into the form, but please do not change the font or margins.

### **APPENDICES**

The application is to be accompanied by three appendices as follows:

#### **Appendix A – Project Narrative (5 pages only including figures and references)**

1. The plan of work for the project should concisely describe the present state of knowledge regarding the problem, the scope, specific objectives and importance of the work which will be accomplished during the period.
2. Please outline in what fashion this research can potentially be applied to the *regulation of human fertility or to a method of birth control*. This information may be helpful in making a choice between applications which are equally attractive from a purely scientific point of view.

## **Appendix B – Letters of Support**

**1. Independent Expert Reviews:** The applicant should contact **two independent experts** who will **review** the proposal, comment on its scientific merit, and give their opinion of the ability of the lab to supervise and support the project. These reviewers should be experts in the field *who do not know the applicant personally* and should state their own qualifications to perform the review. Representatives of any institutional unit that stands to receive financial benefit from a fellowship are not considered to be independent reviewers. Preference is for reviewers from outside the applicant's institution. The instructions and form included in this application material should be sent to the expert reviewers.

**2. Reference:** The applicant should also submit **one letter of reference** from *someone who does know the applicant's work* and who can comment on the applicant's abilities as a researcher. This should not be the person who will be the mentor/sponsor on the project but rather someone like a dissertation advisor or committee member. The instructions and form included in this application material should be sent to the reference.

**3.** The applicant should request a letter from the proposed **sponsor/mentor** outlining in layman's terms the relevance/importance of the project to the foundation's focus; the training/experiences during the project that will assist the fellow to apply successfully for continuing funding and to progress toward independence; the ability of the fellow to carry out the proposed project. The sponsor/mentor should prepare the letter of support utilizing the instructions included in this application material.

*All letters should be sent to the applicant for inclusion in the proposal packet. These letters should be on the forms provided in these instructions and in sealed envelopes, marked "Confidential," and signed by the reviewer on the envelope flap. All letters of support should include the NIH Biographical Sketch of the person writing the review. **Proposals are not complete without these letters.** Please plan ahead; emailed letters are not confidential and are not acceptable.*

## **APPENDIX C - Institutional Tax Status and Approvals**

The Appendix is to set forth information concerning the institution's eligibility to receive grants under U.S. tax laws and approvals of the project by reviewing bodies.

**1.** Attach a copy of the institution's **IRS 501(c)(3) determination letter**. Institutions outside the United States should attach their country's **equivalent nonprofit designation**.

**2.** Please complete the **Institutional Representation** included with these instructions.

## **OBLIGATIONS OF THE GRANTEE**

The applicant institution, if awarded a grant, agrees to the following:

**1.** To maintain funds awarded by the foundation in a separate fund (which may be a separate bank account or a separate bookkeeping account) maintained for charitable purposes.

2. To maintain records of the receipts and expenditures and to make its books and records available to the Lalor Foundation at reasonable times.
3. Not to use any of the funds granted –
  - a. to carry on propaganda, or otherwise to attempt, to influence legislation (within the meaning of section 4945(d)(1) of the U.S. Internal Revenue Code);
  - b. To influence the outcome of any specific public election, or to carry on, directly or indirectly, and voter registration drive (within the meaning of section 4945d(d)(2) of the U.S. Internal Revenue Code);
  - c. To make any grant which does not comply with the requirements of section 4945(d)(3) or (4) of the U.S. Internal Revenue Code; or
  - d. To undertake any activity for any purpose other than one that is charitable, scientific or educational.
4. To submit full and complete narrative and financial reports as scheduled and described in the award letter.
5. To return any portion of the amount granted which is not used for the purposes of the grant.

Applicant Name (Last, First, Middle Initial)

THE LALOR FOUNDATION, INC.

APPLICATION FOR POSTDOCTORAL BASIC RESEARCH FELLOWSHIP

Application Date: January 15, 2010

<b>TITLE OF PROJECT:</b>	
<b>APPLICANT</b> (Last, First, Middle Initial) Name, Degree(s):	<b>SPONSOR/MENTOR</b> (Last, First, Middle Initial) Name, Degree(s):
Academic/Research Title:	Full Academic Title:
Department:	Department:
Institution:	Institution:
Address:	Address:
City, State, Zip	City, State, Zip
Telephone:	Telephone:
Email:	Email:
	Lab Website:

☐ U.S. Citizen      ☐ Other citizenship, please specify \_\_\_\_\_

Years of full-time postdoctoral experience COMPLETED by July 1, 2010    0 ☐    1 ☐    2 ☐

Research on this project will occupy \_\_\_\_\_ % of the time of the fellowship holder, whose other activities will be \_\_\_\_\_

Vertebrate Animals <input type="checkbox"/> No <input type="checkbox"/> Yes	If Yes, IACUC Approval Date	Animal Welfare Assurance #
--	-----------------------------	----------------------------

<b>OFFICIAL SIGNING FOR SPONSORING INSTITUTION</b>	<b>INSTITUTIONAL OFFICER TO RECEIVE FUNDS</b>
Name	Name
Title	Title
Department:	Department:
Address	Address
City, State, Zip:	City, State, Zip:
Telephone	Telephone
Email	Email

<b>APPLICANT CERTIFICATION AND ACCEPTANCE:</b> I certify that the statements herein are true, complete, and accurate to the best of my knowledge, and I agree to comply with the terms and conditions of award if an award is issued as a result of this application. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties.			
<b>SIGNATURE OF APPLICANT NAMED ABOVE.</b> (In ink "Per" signature not acceptable)			<b>DATE</b>
<b>SPONSOR AND SPONSORING INSTITUTION CERTIFICATION AND ACCEPTANCE.</b> We, the undersigned, certify that the statements herein are true, complete, and accurate to the best of our knowledge. If this application results in an award, appropriate training, adequate facilities, and supervision will be provided, and we accept the obligation to comply with the Lalor Foundation terms and conditions of award.			
<b>SIGNATURE OF SPONSOR NAMED ABOVE.</b> (In ink "Per" signature not acceptable)	<b>DATE</b>	<b>SIGNATURE OF OFFICIAL SIGNING FOR SPONSORING INSTITUTION.</b> (In ink "Per" signature not acceptable)	<b>DATE</b>

**2. Abstract of the project in layman's terms and its relevance to The Lalor Foundation's focus: (Limit length to one-half page.)**

**3. Budget:** The Lalor Foundation intends that fellowship funds will be expended for the fellow's stipend and institutional fringe benefits and not for laboratory supplies or equipment. Requests for changes in budgets must receive prior approval from the trustees. Institutional administrative expenses may not exceed 10% of the total award. The budget should be shown in U.S. dollars.

Fellow's Stipend:	\$
Fringe Benefits:	\$
Institutional F&A:	\$ _____
Total Request:	\$

**Budget Justification:**

**Appendix A: Attach a Project Narrative. Limit 5 pages, including figures and references.** Do not alter font size or margins. Include the applicant's name at the top right of each page, last name first.

**APPENDIX B. 4 Letters of Support and Biographical Information****BIOGRAPHICAL SKETCH**

Provide the following information for the key personnel and other significant contributors in the order listed on Form Page 2  
Follow this format for each person **DO NOT EXCEED FOUR PAGES.**

NAME		POSITION TITLE	
eRA COMMONS USER NAME (credential, e.g , agency login)			
EDUCATION/TRAINING <i>(Begin with baccalaureate or other initial professional education, such as nursing, and include postdoctoral training )</i>			
INSTITUTION AND LOCATION	DEGREE <i>(if applicable)</i>	YEAR(s)	FIELD OF STUDY

**NOTE:** The *Biographical Sketch* may not exceed four pages.

- A. Positions and Honors.** List in chronological order previous positions, concluding with your present position. List any honors. Include present membership on any Federal Government public advisory committee.
- B. Selected peer-reviewed publications (in chronological order).** Do not include publications submitted or in preparation. For publicly available citations, URLs or PMC submission identification numbers may accompany the full reference; copies of publicly available publications are not accepted as appendix material.
- C. Research Support.** List selected ongoing or completed (during the last three years) research projects (federal and non-federal support). Begin with the projects that are most relevant to the research proposed in this application. Briefly indicate the overall goals of the projects and your role (e.g., PI, Co-Investigator, Consultant) in the research project. Do not list award amounts or percent effort in projects.



Applicant Name (Last, First, Middle Initial)

THE LALOR FOUNDATION, INC.

(617) 426-7080, Ext 323 -- WWW.LALORFOUND.ORG

**Guidelines for Confidential Letter of Review for Postdoctoral Fellowship**

Dear Expert Reviewer: Thank you for agreeing to serve as an independent expert reviewer of this postdoctoral fellowship application to the Lalor Foundation. Independent reviewers should be experts in the field *who do not know the applicant personally*. In order to ensure that we have comparable information for each applicant, we ask that you address the following points in your review:

1. Briefly state your area of expertise in reproductive biology, and attach your NIH Biographical Sketch (PHS Form 398/2590).
2. Assess the quality of the candidate applying for the fellowship.
3. Assess the scientific quality of the proposal, list strengths as well as weaknesses. We are interested in the originality, practicability, and value of the proposed project.
4. Barring unforeseen circumstances, how likely is it that the proposed work can be accomplished within the term of the fellowship?
5. Comment on the sponsor/mentor's laboratory.

Please mail your confidential review to the applicant for inclusion in the proposal package. Reviews should be mailed in a sealed envelope, marked "Confidential," and you should sign across the back flap of the envelope after it has been sealed. Reviews should reach the applicant in time for the entire proposal package to be mailed by the applicant and received at the foundation by January 15.

The Lalor Foundation greatly appreciates your willingness to accept the responsibility of this review. The foundation's Scientific Review Committee gives considerable weight to the independent reviews. Thank you for your time.

Sincerely,  
Fellowship Manager  
The Lalor Foundation

Applicant Name (Last, First, Middle Initial)

## **INDEPENDENT PROPOSAL REVIEW**

1. Reviewer's Name:
2. Title:
3. Department:
4. Institution:
5. Address:
6. Address:
7. City, State, Zip:
8. Phone: Email:

### **A. Reviewer's Expertise:**

### **B. Assessment of Candidate:**

### **Assessment of Sponsor/Lab:**

THE LALOR FOUNDATION, INC.

(617) 426-7080, Ext. 323 -- WWW.LALORFOUND.ORG

**Guidelines for Confidential Letter of Reference for Postdoctoral Fellowship**

Dear Referee: Thank you for agreeing to serve as a reference for this applicant for a Lalor Foundation postdoctoral fellowship. Referees should be familiar with the applicant's scientific strengths and weaknesses and often are members of the applicant's dissertation committee. In order to ensure that we have comparable information for each applicant, we ask that you address the following points in your review:

1. Briefly state your area of expertise in reproductive biology, and attach your NIH Biographical Sketch (PHS Form 398/2590).
2. Please take up to three pages to prepare your reference. In what capacity do you know the candidate applying for the fellowship? Assess the strengths and weaknesses of the candidate and your assessment of the candidate's ability to carry out the proposed work within the fellowship period. We are also interested in your opinion of how this project may strengthen the candidate's ability to progress in the field of reproductive biology.

Please mail your confidential reference to the applicant for inclusion in the proposal package. References should be mailed in a sealed envelope, marked "Confidential," and you should sign across the back flap of the envelope after it has been sealed. References should reach the applicant in time for the entire proposal package to be mailed by the applicant and received at the foundation by January 15.

The Lalor Foundation greatly appreciates your willingness to accept the responsibility of this reference. The foundation's Scientific Review Committee gives considerable weight to the independent reviews and references. Thank you for your time.

Sincerely,  
Fellowship Manager  
The Lalor Foundation

Applicant Name (Last, First, Middle Initial)

### CANDIDATE REFERENCE

1. Referee's Name:
2. Title:
3. Department:
4. Institution:
5. Address:
6. Address:
7. City, State, Zip:
8. Phone: Email:

**Confidential Assessment of (name) .**

Applicant Name (Last, First, Middle Initial)

THE LALOR FOUNDATION, INC.

(617) 426-7080, Ext. 323 -- WWW.LALORFOUND.ORG

**SPONSOR/MENTOR'S LETTER OF SUPPORT**

Dear Proposed Sponsor/Mentor: Please cover the points outlined on the application specifications, Appendix B, No. 3 and attach your NIH Biographical Sketch to your letter. The applicant should include your letter in the proposal packet which is *due in the foundation's office* by 5:00 p.m. on January 15. Proposals are not complete without all of the letters of evaluation.

By nature, applicants are optimistic and ambitious with regard to their research. Please work with the applicant to see that, barring unforeseen circumstances, the scope of work proposed can reasonably be accomplished in the term of the fellowship.

Your support and guidance will be of utmost importance to the applicant in the event that a fellowship is awarded. Thank you for sponsoring this applicant's efforts to become an independent researcher in the field of reproductive biology.

Sincerely,

Fellowship Manager  
The Lalor Foundation

**APPENDIX C.**

**THE LALOR FOUNDATION, INC.**

(617) 426-7080, Ext 323 -- WWW.LALORFOUND.ORG

**1. Institutional representation (*check one*):**

- ☐ (a) A private **domestic or foreign organization** (a corporation or a trust) that has been determined by the Internal Revenue Service as not being a private foundation under the terms of paragraph (1), (2) or (3) of section 509(a) of the U.S. Internal Revenue Code or as being exempt operating foundation as defined in section 4940(d)(2) of the U.S. Internal Revenue Code; that attached to this Appendix is a true copy of a letter of the Internal Revenue Service **(501(c)(3))** dated \_\_\_\_ by which the Internal Revenue Service made or affirmed such determination; that such determination has not been modified or revoked; and that there are no proceedings, conditions or circumstances known to the institution that could lead to the revocation of such determination.
- ☐ (b) An **agency or instrumentality of a federal, state or local public agency in the United States or the District of Columbia.**
- ☐ (c) An **agency or instrumentality of a foreign government**, namely, the government of \_\_\_\_
- ☐ (d) A **foreign private organization** (a corporation or a trust) that has not received a determination from the Internal Revenue Service as referenced in subparagraph (a) above but is organized under the laws of the following country, namely\_\_\_\_, and is operated for charitable, educational and scientific purposes; and that attached to this Appendix is a true, current and complete copy (with translations into English if necessary) of the charter or other organizing documents for the organization.
- ☐ (e) A **public international organization** entitled to enjoy certain privileges, exemptions and immunities under section 288 of Title 22 of the U.S. Code.

Note: If the institution checks box (a) or box (d) above, it must attach a copy of the document or documents referenced.

**THE LALOR FOUNDATION, INC.**  
c/o GRANTS MANAGEMENT ASSOCIATES  
77 SUMMER STREET, 8<sup>TH</sup> FLOOR  
BOSTON, MASSACHUSETTS 02110-1006 U.S.A.  
(617) 426-7080, FAX: (617) 426-7087  
WWW.LALORFOUND.ORG

**The Anna Lalor Burdick Program**

**Guidelines and Procedures**

**1. Introduction**

The Anna Lalor Burdick Program is an initiative of the Lalor Foundation, which was established in 1935 by Anna Lalor Burdick and her son, Charles Lalor Burdick, with bequests from the Lalor family.

Anna Lalor Burdick was born in Villisca, Iowa in 1869. Upon graduating from Iowa University in 1889, she taught at the Decorah High School until 1891, when she married and moved to Denver. In 1894 she accepted the principal's position at Iowa Falls High School. Later she became superintendent of schools in Des Moines. From 1917 until her retirement in 1939, she served in the US Department of Education as Special Agent for Trade and Industrial Education for Girls and Women. She died in 1944.

Anna Lalor Burdick devoted much of her life to the education, careers and lives of women. In a speech at an education conference "attended by 300 Iowa girls" in 1938, she was quoted as saying:

*Your problem is not to choose between marriage and career, but rather to plan a vocation and career and still be happily married.*

*If a girl chooses not to marry, she needs a means of self-support. If she does marry, catastrophe often changes her plans.*

The trustees are proud to carry on the spirit and many of the interests of Anna Lalor Burdick through this program named in her honor.

**2. Mission and Purpose**

The Anna Lalor Burdick Program seeks to educate young women about human reproduction in order to broaden and enhance their options in life. The Program focuses particularly on young women who have inadequate access to information regarding reproductive health, including the subjects of contraception and pregnancy termination, and as such may be particularly lacking options in their lives.

**3. Funding Interests**

Because limited foundation funding is available in the field of human reproductive education for young women, the trustees are interested in stretching the benefit of its grants as far as possible. Accordingly, the Anna Lalor Burdick Program emphasizes

- Support for one-time projects, ongoing projects, new projects and initiatives that demonstrate realistic plans to achieve greater financial self-sufficiency
- Support for new or smaller organizations, including grassroots efforts, where funding will increase public visibility, improve standing with funders, facilitate overall organizational development, or, in the case of the well defined projects of larger organizations, add a new dimension or capability to operations.
- Support for collaborative efforts among nonprofit organizations
- Support for organizations that can demonstrate a proven ability to reach out to, include and involve young women with inadequate access to information regarding reproductive health
- Support for new ideas, initiatives and demonstration projects, which, if proven effective, may be successfully replicated or provide multiple benefits

#### **4. Geographic Focus**

The Program has no geographic limits

#### **5. Funding Availability and Limits**

- The trustees award a small number of grants in the range of \$10,000 to \$50,000.
- Normally grants are awarded for one year only. Under special circumstances, renewals are considered, such as for projects which clearly require more than one year of support for effective implementation, or for projects which demonstrate outstanding results or promise during their first year.

#### **6. Eligibility**

- Eligible U.S. applicants must be tax exempt under section 501(c)(3) of the U.S. Internal Revenue Service Code, and defined as "not a private foundation" under section 509(a) of the Code. If the applicant is not located in the United States and has not already been classified by the U.S. Internal Revenue Service, please contact the Foundation office at the address or phone number listed at the end of this document.
- Reproductive education must be the centerpiece of the proposed project, which should include attention to the subjects of contraception and pregnancy termination.
- The project must focus on young women, including young mothers and preteens.
- The proposal should include a succinct plan for assessing and reporting on the project's results. In this regard, the trustees are interested in learning from projects that have fallen short of expectations as well as those which have succeeded.



## 7. Areas Where Grants Are Not Normally Made

- To full proposals submitted in advance of a concept paper that has been reviewed and approved by the trustees for further consideration.
- To individuals, or for individual research projects and scholarship.
- To requests for endowment or major capital support.
- To prior grantees which have failed to provide grant reports.
- To organizations with no track record or no personnel known to the trustees or to the staff at Grants Management Associates.

## 8. Application Procedures

- **The Concept Paper** – Organizations are asked to begin the application process by submitting a concept paper in accordance with the foundation's concept paper application format. The concept paper application form is available on the Lalor Foundation website or through the Foundation office at the address and phone number listed at the end of this document. Concept papers may be submitted electronically or by mail.
- **Full Proposals** – Applicants whose concept papers have been approved by the trustees will be invited to submit full proposal narratives not exceeding twelve pages in length. The narrative must include a full discussion of the proposed project, the project budget and the intended benefit. In addition to the proposal, applicants may include general background materials such as an informational annual report and brochures. Required attachments are:
  - The organization's letter from the IRS stating that it is tax-exempt under Section 501(c)(3) and not a private foundation under Section 509(a). Foreign applicants should contact Grants Management Associates (see Section 10) for further instructions.
  - An up-to-date audited financial statement and a complete copy of a recent Form 990 federal tax return.
  - Current organizational and project budget and, if available, budgets for the coming year.
  - Leadership information about the applicant's board and staff.

Complete applications may be submitted electronically or by mail. The trustees cannot give grant consideration to organizations whose proposals are incomplete.

## 9. Deadlines

The trustees meet twice a year, in June and December. Proposals are not normally considered out of cycle. The respective deadlines for the receipt of concept papers are May 15 and November 1, or in the case of holidays or weekends, on the next business day. Applicants will be informed of the foundation's decision regarding the concept paper by July 15 and January 15 respectively. Applicants who are invited to submit a full proposal will have 60 days from the date of notification to submit their proposal and will be notified of the foundation's decision 30 days after receipt of the proposal.

## **10. Contact Information**

Concept papers and full proposals should be addressed to the Anna Lalor Burdick Program at [LalorFoundation@grantsmanagement.com](mailto:LalorFoundation@grantsmanagement.com) or to

The Anna Lalor Burdick Program  
c/o Grants Management Associates  
77 Summer Street, 8<sup>th</sup> Floor  
Boston, MA 02110-1006

For further information, organizations are welcome to call, write or e-mail Susan Haff at GMA at (617) 426-7080 ext 323 or [shaff@grantsmanagement.com](mailto:shaff@grantsmanagement.com). Current information about the Lalor Foundation and the Anna Lalor Burdick Program, such as recent grants and any changes in the guidelines, is available at [www.lalorfound.org](http://www.lalorfound.org).

## **10. Contact Information**

Concept papers and full proposals should be addressed to the Anna Lalor Burdick Program at [LalorFoundation@grantsmanagement.com](mailto:LalorFoundation@grantsmanagement.com) or to

The Anna Lalor Burdick Program  
c/o GMA Foundations  
77 Summer Street, 8<sup>th</sup> Floor  
Boston, MA 02110-1006

For further information, organizations are welcome to call, write or e-mail Amy Shorey at GMA Foundations at (617) 426-7080 ext. 315 or [ashorey@gmafoundations.com](mailto:ashorey@gmafoundations.com). Current information about the Lalor Foundation and the Anna Lalor Burdick Program, such as recent grants, is available at [www.lalorfound.org](http://www.lalorfound.org).

**The Lalor Foundation, Inc.**  
**Anna Lalor Burdick Program**  
Concept Paper Application

**Concept Paper Instructions & Application**

1. Please review the Anna Lalor Burdick Program guidelines carefully to determine if you have a project that meets the funding interests. The guidelines can be found on the Lalor Foundation website, [www.lalorfound.org](http://www.lalorfound.org).
2. Please fill out the application form completely and attach a two page narrative describing your proposed project. Your concept paper narrative should include the following:
  - a. Project description including need, goals and anticipated outcomes, and justification or basis for approach.
  - b. If the project has a training component, indicate the number of people to be trained and the length of training.
  - c. At the conclusion of this project how will you know you have been successful? What steps will you take to measure your project's success?
  - d. List the project leadership and briefly summarize their qualifications.
  - e. Briefly summarize project expenses or attach project budget (e.g., project staff, materials, etc.)
  - f. List three references, preferably prior funders, who can attest to the track record of the organization and project leaders. Please provide a contact name, the organization name, address and phone number for each reference. References may be provided on a separate sheet.
3. If you have questions, please refer to the guidelines on the website, [www.lalorfound.org](http://www.lalorfound.org). If you need further assistance, please contact program staff for the foundation at GMA Foundations.
4. Submit your completed concept paper application to Anna Lalor Burdick Program, c/o GMA Foundations, 77 Summer Street, 8<sup>th</sup> Floor, Boston, MA 02110 or via email to [shaff@gmafoundations.com](mailto:shaff@gmafoundations.com)
5. Deadlines for concept paper applications are May 1 and November 1.

**The Lalor Foundation, Inc.**  
**Anna Lalor Burdick Program**  
 Concept Paper Application

<b>Applicant Details</b>			
Name of Applicant Organization			
Executive Director/CEO	Phone	Email	
Project Director	Phone	Email	
Address			
City	State	Zip	Country
Phone	Fax	URL	
Organization's Mission:			
Organization's annual operating budget: \$_____ (US Dollars) for fiscal year ending ____/____/____. (If the applicant is a University, please indicate the total annual department budget.)			
Is the organization a tax-exempt, 501(c)(3) charitable organization? <input type="checkbox"/> Yes <input type="checkbox"/> No   IRS Tax Exempt ID#			
If the organization is not based in the United States and is not tax-exempt under section 501(c)(3) of the Internal Revenue Code, please name the equivalent code and/or defining body in your country: (please attach documentation)			
<b>Project Details</b>			
Project Title:			
Total Project Budget \$		(US Dollars)	Amount Requested \$ (US Dollars)
Project Duration	From: ____/____/____ to: ____/____/____		
Population Served:		Geographic Area(s) Served	
<b>Project Abstract</b> In one paragraph, please summarize project for which funds are requested.			

**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No. 1545-1709

▶ **File a separate application for each return.**

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

**Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

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

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

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on **e-file for Charities & Nonprofits**.

<b>Type or print</b>	Name of Exempt Organization	<b>Employer identification number</b>
	THE LALOR FOUNDATION, INC.	51-6000153
	Number, street, and room or suite no. If a P.O. box, see instructions. C/O GMA FOUNDATIONS 77 SUMMER ST., 8TH FLOOR	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions BOSTON, MA 02110	

**Check type of return to be filed** (file a separate application for each return):

- |   |   |                                    |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

**GMA FOUNDATIONS**

- The books are in the care of ▶
- 77 SUMMER STREET, 8TH FLOOR - BOSTON, MA 02110**

Telephone No. ▶ **617-426-7080**

FAX No. ▶

- If the organization does not have an office or place of business in the United States, check this box
- ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **MAY 15, 2010**, to file the exempt organization return for the organization named above. The extension

is for the organization's return for:

▶ ☐ calendar year \_\_\_\_\_ or▶ ☒ tax year beginning **OCT 1, 2008**, and ending **SEP 30, 2009**.

- 2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	0.
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	1,750.
<b>c</b> <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	0.

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.**LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.**Form **8868** (Rev. 4-2009)