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75-7922-77

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

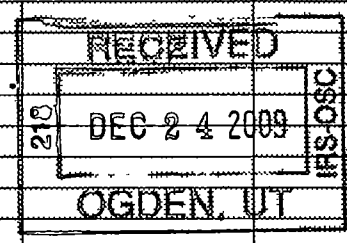
Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2008, or tax year beginning **NOV 1, 2008**, and ending **OCT 31, 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 C.J.L. CHARITABLE FOUNDATION		A Employer identification number 04-6552121	
	Number and street (or P O box number if mail is not delivered to street address) M. SPARROW, TRUSTEE GOULSTON & STORRS		Room/suite	B Telephone number 617-482-1776
	City or town, state, and ZIP code BOSTON, MA 02110-3333		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 ☐	
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) \$ 5,376,028. (Part I, column (d) must be on cash basis.)		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____		
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 ☐				

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)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	20,631.	20,631.		STATEMENT 1
	4 Dividends and interest from securities	2,702.	2,702.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	136,011.			
	b Gross sales price for all assets on line 6a	197,775.			
	7 Capital gain net income (from Part IV, line 2)		136,011.		
	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 Total. Add lines 1 through 11	159,344.	159,344.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 3	1,809.	0.		1,809.
	b Accounting fees STMT 4	6,125.	0.		6,125.
	c Other professional fees				
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 5	3,742.	1,809.		1,933.
	24 Total operating and administrative expenses Add lines 13 through 23	11,676.	1,809.		9,867.
	25 Contributions, gifts, grants paid	228,250.			228,250.
	26 Total expenses and disbursements Add lines 24 and 25	239,926.	1,809.		238,117.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-80,582.			
	b Net investment income (if negative, enter -0-)		157,535.		
	c Adjusted net income (if negative, enter -0-)			N/A	



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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		
Assets	1 Cash - non-interest-bearing			423.	104.	104.
	2 Savings and temporary cash investments			5,292,500.	5,274,000.	5,274,000.
	3 Accounts receivable ▶					
	Less allowance for doubtful accounts ▶					
	4 Pledges receivable ▶					
	Less allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons					
	7 Other notes and loans receivable ▶					
	Less allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments - U S and state government obligations STMT 6			76,047.	76,047.	77,877.
	b Investments - corporate stock STMT 7			87,210.	25,447.	24,047.
	c Investments - corporate bonds					
11 Investments - land, buildings, and equipment basis ▶						
Less accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other						
14 Land, buildings, and equipment basis ▶						
Less accumulated depreciation ▶						
15 Other assets (describe ▶)						
16 Total assets (to be completed by all filers)			5,456,180.	5,375,598.	5,376,028.	
Liabilities	17 Accounts payable and accrued expenses					
	18 Grants payable					
	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable					
	22 Other liabilities (describe ▶)					
23 Total 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.					
	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ☒ and complete lines 27 through 31.					
	27 Capital stock, trust principal, or current funds			5,456,180.	5,375,598.	
	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 Total net assets or fund balances			5,456,180.	5,375,598.	
31 Total liabilities and net assets/fund balances			5,456,180.	5,375,598.		

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	5,456,180.
2 Enter amount from Part I, line 27a	2	-80,582.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	5,375,598.
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	5,375,598.

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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.)
1a COMMON STOCK GOULSTON & STORRS 7922-77	D	VARIOUS	VARIOUS
b SEE STATEMENT 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 197,775.		61,764.	136,011.
b			0.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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			136,011.
b			0.
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	136,011.
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	236,659.	5,545,726.	.042674
2006	233,124.	5,343,440.	.043628
2005	222,982.	5,357,513.	.041620
2004	30,504.	2,153,700.	.014164
2003	24,592.	263,495.	.093330

2 Total of line 1, column (d)	2	.235416
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	.047083
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	5,326,761.
5 Multiply line 4 by line 3	5	250,800.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,575.
7 Add lines 5 and 6	7	252,375.
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	238,117.

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 ☐ and enter "N/A" on line 1 Date of ruling letter _____ (attach copy of ruling letter if necessary-see instructions)		1	3,151.
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	3,151.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		5	3,151.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments			
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a 1,238.		
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	1,238.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	46.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	1,959.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2009 estimated tax ☐ Refunded ☐	11		

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
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? 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) ☐ 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? 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? Website address ► N/A	13	X	
14	The books are in care of ► GOULSTON & STORRS Located at ► 400 ATLANTIC AVE., BOSTON, MA	Telephone no ► 617-482-1776 ZIP+4 ► 02111-3333		
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?	☐ 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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	
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?	1b	
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))	1c	X
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 ►		
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.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	2b	
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.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	3b	
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?	4a	X
	4b	X

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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

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

7b

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

N/A

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
CATHY J. LURIE	TRUSTEE			
C/O GOULSTON & STORRS 400 ATLANTIC AV	1.00	0.	0.	0.
BOSTON, MA 02110				
MARVIN SPARROW, ESQ.	TRUSTEE			
GOULSTON & STORRS 400 ATLANTIC AVE.	1.00	0.	0.	0.
BOSTON, MA 02110				

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 VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 NOT APPLICABLE	
	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

	Amount
1 NOT APPLICABLE	
	0.
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	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 202,411.
b	Average of monthly cash balances	1b 5,205,468.
c	Fair market value of all other assets	1c
d	Total (add lines 1a, b, and c)	1d 5,407,879.
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 5,407,879.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 81,118.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 5,326,761.
6	Minimum investment return. Enter 5% of line 5	6 266,338.

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	1 266,338.
2a	Tax on investment income for 2008 from Part VI, line 5	2a 3,151.
b	Income tax for 2008 (This does not include the tax from Part VI)	2b
c	Add lines 2a and 2b	2c 3,151.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 263,187.
4	Recoveries of amounts treated as qualifying distributions	4 0.
5	Add lines 3 and 4	5 263,187.
6	Deduction from distributable amount (see instructions)	6 0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7 263,187.

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 238,117.
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	4 238,117.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5 0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6 238,117.

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

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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				263,187.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			12,273.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2008				
a From 2003				
b From 2004				
c From 2005				
d From 2006				
e From 2007				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 238,117.				
a Applied to 2007, but not more than line 2a			12,273.	
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				225,844.
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))	0.			0.
6 Enter the net total of each column as indicated below:	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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				37,343.
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	0.			
10 Analysis of line 9				
a Excess from 2004				
b Excess from 2005				
c Excess from 2006				
d Excess from 2007				
e Excess from 2008				

Form 990-PF (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(I)(3) or ☐ 4942(I)(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

[illegible]

- 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(i)(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**

C.J.L. CHARITABLE FOUNDATION, C/O GOULSTON & STORRS, (617) 482-1776
400 ATLANTIC AVE., BOSTON, MA 02110 ATTN: M. SPARROW, ESQ

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

WRITTEN FORM INDICATING AMOUNTS REQUESTED AND PROJECTED USE.

- c Any submission deadlines**

NONE

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

CHARITABLE PURPOSES UNDER I.R.C. SECTION 501(C)(3)

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 <i>Paid during the year</i> SEE STATEMENT A				228,250.
Total			▶ 3a	228,250.
b <i>Approved for future payment</i> NONE				
Total			▶ 3b	0.

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 _____					
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			14	20,631.	
4 Dividends and interest from securities			14	2,702.	
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	136,011.	
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.		159,344.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	159,344.

(See worksheet in line 13 instructions to verify calculations)

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes)
---------------	--

[illegible]

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

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[illegible]

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
N/A		

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 W. Sparrow, Trustee Date 12/2/09

Sign Here

Signature of officer or trustee

Date _____

Title

Preparer's
signature

Phillip A. Gordon

Date _____

12/1/69

Check if self-employed	
------------------------	--

Preparer's identifying number

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

DELOITTE TAX LLP
200 BERKELEY STREET
BOSTON, MA 02116

EIN

Phone no (617) 437-2000

Form 990-PF (2008)

-- CAPITAL GAINS/LOSSES --

DESCRIPTION/ ACQUIRED/SOLD DATE	UNITS	PROCEEDS	COST	SHORT-TERM G/L	QUAL 5 YR GAIN	LONG-TERM G/L
AES CORP						
SOLD 05/21/09 750 SHS						
@ 8 612						
03/07/03 05/21/09	750	6,358 83	2,422 50-			3,936.33
AETNA INC NEW						
SOLD 05/21/09 600 SHS						
@ 24 902						
01/15/02 05/21/09	400	9,893.87	3,576 00-			6,317.87
02/07/02 05/21/09	200	4,946 94	1,752.00-			3,194 94
TOTAL	600*	14,840 81 *	5,328.00-*			9,512.81 *
AMERICAN EAGLE OUTFITTERS						
SOLD 05/21/09 600 SHS						
@ 13 452						
10/03/02 05/21/09	600	7,970 99	2,304 00-			5,666 99
AUTODESK INC						
SOLD 05/21/09 300 SHS						
@ 18.672						
03/07/03 05/21/09	300	5,501 45	2,067 00-			3,434.45
CROWN CASTLE INTL						
SOLD 05/21/09 875 SHS						
@ 22 4811						
01/14/05 05/21/09	875	19,570 45	14,831 25-			4,739.20
EOG RESOURCES INC						
SOLD 05/21/09 200 SHS						
@ 69 252						
02/07/02 05/21/09	200	13,750 04	3,182 00-			10,568.04
EDISON INTERNATIONAL						
SOLD 05/21/09 250 SHS						
@ 28 542						
10/03/02 05/21/09	250	7,035 31	2,655.00-			4,380.31
HALLIBURTON COMPANY COM						
SOLD 05/21/09 297 SHS						
@ 21 2417						
10/03/02 05/21/09	297	6,208 61	2,117 61-			4,091.00

Statement B

ADM - CB1
INV - 052

TAX I D NO 04-6552121

PERIOD 11/01/08 THRU 10/31/09
TAX PERIOD FREQ 1099A/C 75-7922-77 C J L CHARITABLE FOUNDATION UDT DTD
12/29/86

CATHY J LURIE & MARVIN SPARROW TRS

-- CAPITAL GAINS/LOSSES (CONTINUED) --

DESCRIPTION/ ACQUIRED/SOLD DATE	UNITS	PROCEEDS	COST	SHORT-TERM G/L	QUAL 5 YR GAIN	LONG-TERM G/L
HESS CORPORATION						
SOLD 05/21/09 150 SHS						
@ 60.992	150	9,048.56	2,145.00			6,903.56
03/07/03 05/21/09						
JUNIPER NETWORKS						
SOLD 05/21/09 500 SHS						
@ 23.10	500	11,449.70	2,520.00			8,929.70
10/03/02 05/21/09						
KBR INC						
SOLD 05/21/09 322 SHS						
@ 16.632	322	5,255.36	1,449.00			3,806.36
10/03/02 05/21/09						
MCDONALDS CORP COM						
SOLD 05/21/09 550 SHS						
@ 55.432	550	30,386.81	6,858.50			23,528.31
03/07/03 05/21/09						
MEDTRONIC INC COM						
SOLD 05/21/09 330 SHS						
@ 31.942	330	10,440.58	1,268.00			9,172.58
01/22/04 05/21/09						
MONSANTO CO NEW COM						
SOLD 05/21/09 200 SHS						
@ 88.642	200	17,627.94	1,584.00			16,043.94
07/23/02 05/21/09						
OCCIDENTAL PETE CORP COM						
SOLD 05/21/09 200 SHS						
@ 60.782	200	12,056.08	2,408.00			9,648.08
07/23/02 05/21/09						
PACCAR INC						
SOLD 05/21/09 168 SHS						
@ 27.942	168	4,594.13	1,678.32			2,915.81
07/23/02 05/21/09						
SYSO CORP COM						
SOLD 05/21/09 370 SHS						
@ 23.012	20	454.82	248.00			206.82
01/22/04 05/21/09	234	5,321.43	2,835.00			2,486.43
01/22/04 05/21/09						

Statement B

A/C 75-7922-77 C J L CHARITABLE FOUNDATION UDT DTD
12/29/86
CATHY J LURIE & MARVIN SPARROW TRS

TAX I D NO 04-6552121

ADM - CB1
INV - 052

-- CAPITAL GAINS/LOSSES (CONTINUED) --

DESCRIPTION/ ACQUIRED/SOLD DATE	UNITS	PROCEEDS	COST	SHORT-TERM G/L	QUAL 5 YR GAIN	LONG-TERM G/L
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(CONTINUED)

SYSCO CORP COM
SOLD 05/21/09 370 SHS
@ 23 012
01/22/04 05/21/09
TOTAL

116	2,637 97	1,433 00-				1,204 97
370*	8,414 22 *	4,516 00-*				3,898.22 *

YAHOO INC
SOLD 05/21/09 500 SHS
@ 14 7315
10/03/02 05/21/09

500	7,265 56	2,430.00-				4,835 56
	197,775 43 **	61,764 18-**				136,011 25 **

--TOTAL CAPITAL GAIN/LOSSES--

GRAND TOTAL GAIN/LOSS FOR ACCOUNT

197,775 43 **	61,764 18-**					136,011.25 **
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SUMMARY OF GAINS AND LOSSES

NET G/L	SHORT-TERM G/L	QUAL 5 YR GAIN	LONG-TERM G/L
---------	----------------	----------------	---------------

GAIN/LOSS FROM PARTNERSHIPS
CAPITAL GAIN DISTRIBUTIONS
OTHER CAPITAL GAINS
OTHER CAPITAL LOSSES
LOSS CARRYOVER

136,011 25			136,011 25
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-- NET GAIN/LOSS --

136,011.25			136,011 25
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Statement B

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
INTEREST	20,631.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	20,631.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
AETNA INC NEW	24.	0.	24.
AMERICAN EAGLE OUTFITTERS	120.	0.	120.
EDISON INTERNATIONAL	155.	0.	155.
EOG RESOURCES INC	56.	0.	56.
FEDERATED GNMA TR SH BEN INT	795.	0.	795.
FEDERATED INCOME SECS TR S/T	248.	0.	248.
HALLIBURTON COMPANY COM	53.	0.	53.
HESS CORPORATION	30.	0.	30.
KBR INC	32.	0.	32.
MCDONALDS CORP COM	550.	0.	550.
MEDTRONIC INC COM	124.	0.	124.
MONSANTO CO NEW COM	101.	0.	101.
OCCIDENTAL PETE CORP COM	128.	0.	128.
PACCAR INC	108.	0.	108.
SYSCO CORP COM	178.	0.	178.
TOTAL TO FM 990-PF, PART I, LN 4	2,702.	0.	2,702.

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GOULSTON & STORRS	1,809.	0.		1,809.
TO FM 990-PF, PG 1, LN 16A	1,809.	0.		1,809.

FORM 990-PF

ACCOUNTING FEES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DELOITTE TAX LLP - TAX PREP FEES	6,125.	0.		6,125.
TO FORM 990-PF, PG 1, LN 16B	6,125.	0.		6,125.

FORM 990-PF

OTHER EXPENSES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MA FORM PC FILING FEE	125.	0.		125.
GOULSTON & STORRS TRUSTEE FEES	3,617.	1,809.		1,808.
TO FORM 990-PF, PG 1, LN 23	3,742.	1,809.		1,933.

FORM 990-PF

U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS

STATEMENT 6

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
FEDERAL BONDS	X		76,047.	77,877.
TOTAL U.S. GOVERNMENT OBLIGATIONS			76,047.	77,877.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			76,047.	77,877.

FORM 990-PF

CORPORATE STOCK

STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	25,447.	24,047.
TOTAL TO FORM 990-PF, PART II, LINE 10B	25,447.	24,047.

CJL CHARITABLE FOUNDATION
EIN: 04-6552121
FYE: 10/31/09

FORM 990 PF, PART XV LINE 3a

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ORGANIZATION	RELATIONSHIP	STATUS	PURPOSE	AMOUNT
CHESS CORP	NONE	PUBLIC CHARITY	GENERAL WELFARE	2,500
RXART	NONE	PUBLIC CHARITY	GENERAL WELFARE	500
WGBH EDUCATIONAL FOUNDATION	NONE	PUBLIC CHARITY	RESEARCH / EDUCATION	1,000
HEIFER PROJECT INTERNATIONAL INC	NONE	PUBLIC CHARITY	GENERAL WELFARE	1,000
WORLD SECURITY INSTITUTE	NONE	PUBLIC CHARITY	GENERAL WELFARE	250
COMBINED JEWISH PHILANTHROPIES OF GREATER BOSTON				
INC DISABILITY HOUSING INITIATIVE	NONE	PUBLIC CHARITY	GENERAL WELFARE	2,500
OXFAM AMERICA INC	NONE	PUBLIC CHARITY	GENERAL WELFARE	2,500
NATURAL RESOURCES DEFENSE COUNCIL INC	NONE	PUBLIC CHARITY	GENERAL WELFARE	2,500
THE PLOUGHSHARES FUND - SALLY LILIENTHAL LEGACY	NONE	PUBLIC CHARITY	CONSERVATION	10 000
ROSIES PLACE INC	NONE	PUBLIC CHARITY	GENERAL WELFARE	1,500
THE SOUTHERN POVERTY LAW CENTER - TEACHING TOLERANCE	NONE	PUBLIC CHARITY	GENERAL WELFARE	500
FACILITATED COMMUNICATION INSTITUTE SYRACUSE UNIVERSITY	NONE	PUBLIC CHARITY	RESEARCH / EDUCATION	2,500
DANA FARBER CANCER INSTITUTE	NONE	PUBLIC CHARITY	RESEARCH / EDUCATION	200,000
THE GREATER BOSTON FOOD BANK	NONE	PUBLIC CHARITY	GENERAL WELFARE	500
BOSTON HEALTH CARE FOR THE HOMELESS PROGRAM INC	NONE	PUBLIC CHARITY	GENERAL WELFARE	500
				- - - - -
				228,250
				= = = = =

STATEMENT A