






















See a Social Security Number? Say Something!
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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	8,594	122,102	122,102
	2	Savings and temporary cash investments	2,140,522	588,015	588,015
	3	Accounts receivable  _____ Less allowance for doubtful accounts  _____			
	4	Pledges receivable  _____ Less allowance for doubtful accounts  _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7	Other notes and loans receivable (attach schedule)  _____ 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 (attach schedule)			
	b	Investments—corporate stock (attach schedule)	11,701,104 	3,071,149	3,071,149
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis  _____ Less accumulated depreciation (attach schedule)  _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	412,247 	11,348,112	11,348,112
	14	Land, buildings, and equipment basis  _____ Less accumulated depreciation (attach schedule)  _____			
15	Other assets (describe  _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	14,262,467	15,129,378	15,129,378	
Liabilities	17	Accounts payable and accrued expenses	309		
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe  _____)			
	23	Total liabilities (add lines 17 through 22)	309	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here  <input type="checkbox"/> 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  <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	14,262,158	15,129,378	
	30	Total net assets or fund balances (see the instructions)	14,262,158	15,129,378	
31	Total liabilities and net assets/fund balances (see the instructions)	14,262,467	15,129,378		

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	14,262,158
2	Enter amount from Part I, line 27a	2	-879,322
3	Other increases not included in line 2 (itemize)  _____ 	3	1,746,542
4	Add lines 1, 2, and 3	4	15,129,378
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	15,129,378

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	investment	P		
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 2,968,102		3,420,644	-452,542
b			
c			
d			
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			-452,542
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	-452,542
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8		3	

Part V

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2007	996,313	18,011,386	0 055316
2006	559,762	18,405,039	0 030414
2005	365,000	13,632,186	0 026775
2004	131,061	11,834,893	0 011074
2003	188,510	7,176,623	0 026267

2 Total of line 1, column (d).	2	0 149846
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 029969
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5.	4	14,202,838
5 Multiply line 4 by line 3.	5	425,645
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	3,824
7 Add lines 5 and 6.	7	429,469
8 Enter qualifying distributions from Part XII, line 4.	8	808,865

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See
the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see the instructions)							
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	3,824				
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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b							
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		2	0				
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)							
3 Add lines 1 and 2.				3	3,824		
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	3,824				
6 Credits/Payments							
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a			18,000			
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	18,000				
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 <input type="checkbox"/>		9					
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . <input type="checkbox"/>		10	14,176				
11 Enter the amount of line 10 to be Credited to 2009 estimated tax <input type="checkbox"/> 3,840 Refunded <input type="checkbox"/>		11	10,336				

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

Part VII-A

Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11a		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Web site address ▶N/A				
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			15

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(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)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)?	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2008?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008?			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see the instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
b	If "Yes," did it have excess business holdings in 2008 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?	4b		No

Part 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)? (see instructions).

☐ 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

5b

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 the instructions)?

☐ Yes ☒ No

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?

☐ 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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see the instructions).

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

2

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

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

Total

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

0

Part VIII Information About Officers and Contractors Continued

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

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

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

Part IX-A Summary of Direct Charitable Activities

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

1 grants to various charitable organizations	808,865
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See the instructions	
3	

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

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	12,831,787
b	Average of monthly cash balances.	1b	1,587,338
c	Fair market value of all other assets (see the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	14,419,125
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	14,419,125
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see the instructions).	4	216,287
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	14,202,838
6	Minimum investment return. Enter 5% of line 5.	6	710,142

Part XI

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

1	Minimum investment return from Part X, line 6.	1	710,142
2a	Tax on investment income for 2008 from Part VI, line 5.	2a	3,824
b	Income tax for 2008 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	3,824
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	706,318
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	706,318
6	Deduction from distributable amount (see the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	706,318

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	808,865
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	808,865
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	3,824
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	805,041

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

Part XIII

Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				706,318
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only.			737,420	
b Total for prior years 20____, 20____, 20____		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 ▶ \$ 808,865				
a Applied to 2007, but not more than line 2a			737,420	
b Applied to undistributed income of prior years (Election required—see the instructions). . . .		0		
c Treated as distributions out of corpus (Election required—see the instructions).	0			
d Applied to 2008 distributable amount.				71,445
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:				
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 the instructions.		0		
e Undistributed income for 2006 Subtract line 4a from line 2a Taxable amount—see the instructions.			0	
f Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2008.				634,873
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see the instructions).	0			
8 Excess distributions carryover from 2002 not applied on line 5 or line 7 (see page 27 of the instructions).	0			
9 Excess distributions carryover to 2008. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a From 2004.				
b From 2005.				
c From 2006.				
d From 2007.				
e From 2008.				

Part XIV

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

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV

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

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

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

a

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

Helen B Habbert
c/o GMA Foundations 77 summer stree
boston,MA 02110
(617) 426-7080

b

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

Letter with proof of 501(c)(3) qualification, program description, and budget details

c

Any submission deadlines

May 1

d

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

N/A

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 Additional Data Table				
Total			3a	750,000
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities.			14	288,333	
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.			18	144,701	
8 Gain or (loss) from sales of assets other than inventory			18	-452,542	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a Tax refund _____					14,152
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). .		0		-19,508	14,152
13 Total. Add line 12, columns (b), (d), and (e).			13		-5,356

[illegible]

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

[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

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.

*****	2010-03-13	*****
Signature of officer or trustee	Date	Title

Preparer's Signature  JOEL ARONSON CPA

Date


2010-03-13

Check if self-employed ☐

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

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

ALEXANDER ARONSON FINNING & CO PC
21 EAST MAIN STREET
WESTBORO, MA 01581

EIN 

Phone no (508) 366-9100

Additional Data

Software ID: 08000094
Software Version: 2008.05040
EIN: 25-6144060
Name: THE ALLEN H AND SELMA W BERKMAN
CHARITABLE TRUST CO GMA Foundations


Form 990PF PartVIII Line 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
Helen Berkman Habbert	Trustee 3 00	0	0	0
c/o GMA Foundation 77 summer street 8th floor Boston, MA 02110				
James S Berkman	Trustee 3 00	0	0	0
c/o GMA Foundation 77 summer street 8th floor Boston, MA 02110				
Susan Berkman Rahm	Trustee 3 00	0	0	0
c/o GMA Foundation 77 summer street 8th floor Boston, MA 02110				
Richard L Berkman	Trustee 3 00	0	0	0
c/o GMA Foundation 77 summer street 8th floor Boston, MA 02110				
Barbara Berkman Ackerman	Trustee 3 00	0	0	0
c/o GMA Foundation 77 summer street 8th floor Boston, MA 02110				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
American Jewish Committee 165 East 56th Street New York, NY 10022746		public charity	in support of the Christian Leadership Initiative	50,000
carnegie mellon university 5000 forbes avenue pittsburg, PA 15213		public charity	in support of the college of fine arts' student fellowship	5,000
Children's Literacy Initiative 2314 Market Street Philadelphia, PA 19103		public charity	in support of the Philadelphia Early Literacy Achievement Project	150,000
Comprehensive Community Child Care Organization Inc dba 4C for Childre 1924 Dana Avenue Cincinnati, OH 45207		public charity	in support of the Developing Early Childhood Leaders programs	50,000
Congregation Emanu-El of the City of New York 1 East 65th Street New York, NY 10021		public charity	food for the poor sunday lunch program	10,000
East Harlem Tutorial Program 2050 Second Avenue New York, NY 10029		public charity	in unrestricted operating support	5,000
freestore food bank 1250 tennessee avenue cincinnati, OH 45229		public charity	in unrestricted operating support	20,000
greater boston food bank 99 atkinson street boston, MA 02110		public charity	in unrestricted operating support	30,000
Harlem Children's Zone 35 East 125th Street New York, NY 10035		public charity	in support of the Harlem Gems program	150,000
Horizons for Homeless Children 1705 Columbus Avenue Roxbury, MA 02119		public charity	in unrestricted operating support	15,000
jewish family and children's service of greater philadelphia 2100 arch street 5th floor philadelphia, PA 19103		public charity	in support of the Critical needs program	40,000
jewish family and children's service of pittsburg 5743 bartlett street pittsburg, PA 15217		public charity	in general operating support of the Squirrel Hill Food Pantry	20,000
Jumpstart for Young Children Inc 308 Congress Street Boston, MA 02110		public charity	in unrestricted operating support	5,000
madisonville education and assistance center 4600 erie avenue cincinnati, OH 45227		public charity	in support of MEAC's literacy program	50,000
Manhattan School of Music 120 Claremont Avenue New York, NY 10027		public charity	in support of the Selma Wiener Berkman Scholarship Fund	5,000
Total  3a				750,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
mazon a jewish response to hunger 10495 santa monica boulevard suite 100 los angeles,CA 90025		public charity	in support of the baby pantry and healthy snack programs	50,000
Mount Sinai Medical Center Inc One Gustave L Levy Place New York,NY 10029		public charity	in support of the Center's Department of Geriatrics/Martha Stewart Center	5,000
LIFT (formerly National Student Partnerships Inc) 800 7th Street NW Suite 300 Washington,DC 20001		public charity	in unrestricted operating support	5,000
Pittsburgh Opera 2425 Liberty Avenue Pittsburgh,PA 15222		public charity	Annual Fund for education and outreach	5,000
Pittsburgh Symphony Inc 600 Penn Avenue Pittsburgh,PA 15222		public charity	\$10,000 in support of PSO's major campaign, and \$5,000 to the Annual Fund fo	15,000
Springwell Inc (formerly West Suburban Elder Services Inc) 125 Walnut Street Watertown,MA 02472		public charity	to deliver Kosher meals to homebound Jewish seniors in Brookline and Newton	20,000
The New York Community Trust 909 Third Avenue 22nd Fl New York,NY 10022		public charity	for the benefit of the Wellmet Group Fund's 'Community Funds, Inc '	10,000
The Pittsburgh Foundation Five PPG Place Suite 250 Pittsburgh,PA 15222		public charity	in support of the Pittsburgh Promise scholarship fund	10,000
the pittsburgh Foundation five PPG Place Suite 250 pittsburg,PA 15222		public charity	in support of the Ackerman Scholarship Fund for the Boys and Girls Clubs of	5,000
the pittsburgh promise 1901 Centre Avenue Suite 204 Pittsburgh,PA 15219		public charity	in unrestricted operating support	5,000
United Jewish Federation of Pittsburgh 234 McKee Place Pittsburgh,PA 15213		public charity	endowment of Rauh Jewish archives	5,000
women's lunch place 67 newbury street boston,MA 02116		public charity	in unrestricted operating support	10,000
Total  3a				750,000

TY 2008 Accounting Fees Schedule

Name: THE ALLEN H AND SELMA W BERKMAN
CHARITABLE TRUST CO GMA Foundations
EIN: 25-6144060

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
accounting	7,430	0		7,430

TY 2008 Explanation of Non-Filing with Attorney General Statement

Name: THE ALLEN H AND SELMA W BERKMAN
CHARITABLE TRUST CO GMA Foundations

EIN: 25-6144060

Statement: The Allen H. and Selma W. Berkman Charitable Trust is registered in PA The Pa Department of State Charities provides for a filing exemption for any charitable organization which receives \$25,000 or less of annual gross national contributions. the allen H. and Selma W. Berkamn Charitable Trust has no contribution income and as such is not required to provide a copy of the Form 990PF to PA

**TY 2008 Investments Corporate
Stock Schedule**

Name: THE ALLEN H AND SELMA W BERKMAN
CHARITABLE TRUST CO GMA Foundations
EIN: 25-6144060

Name of Stock	End of Year Book Value	End of Year Fair Market Value
investments	3,071,149	3,071,149

TY 2008 Investments - Other Schedule

Name: THE ALLEN H AND SELMA W BERKMAN
CHARITABLE TRUST CO GMA Foundations
EIN: 25-6144060

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
investments in limited partnerships	FMV	920,699	920,699
Mutual Funds	FMV	8,305,848	8,305,848
Alternative investmetns	FMV	2,121,565	2,121,565

TY 2008 Legal Fees Schedule

Name: THE ALLEN H AND SELMA W BERKMAN
CHARITABLE TRUST CO GMA Foundations
EIN: 25-6144060

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
	0	0		0

TY 2008 Other Expenses Schedule

Name: THE ALLEN H AND SELMA W BERKMAN

CHARITABLE TRUST CO GMA Foundations

EIN: 25-6144060

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
telephone	484	0		484
postage	543	0		543
membership dues	3,130	0		3,130
investment expenses from k-1	0	5,815		0

TY 2008 Other Income Schedule

Name: THE ALLEN H AND SELMA W BERKMAN
CHARITABLE TRUST CO GMA Foundations
EIN: 25-6144060

Description	Revenue And Expenses Per Books	Net Invest ment Income	Adjusted Net Income
Capital Gain Distributions	144,701	144,701	144,701
capital gain passthrough from K-1		20,225	
Tax refund	14,152		14,152

TY 2008 Other Increases Schedule

Name: THE ALLEN H AND SELMA W BERKMAN
CHARITABLE TRUST CO GMA Foundations
EIN: 25-6144060

Description	Amount
unrealized gain	1,746,542

TY 2008 Other Professional Fees Schedule

Name: THE ALLEN H AND SELMA W BERKMAN
 CHARITABLE TRUST CO GMA Foundations
EIN: 25-6144060

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
grant administration	37,287	0		37,287
investment management	65,101	65,101		0

TY 2008 Taxes Schedule

Name: THE ALLEN H AND SELMA W BERKMAN
CHARITABLE TRUST CO GMA Foundations
EIN: 25-6144060

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
foreign taxes	0	40		0