Form **990-PF**

Department of the Treasury
Internal Revenue Service

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.

OMB No. 1545-0052

2009

For calendar year 2009, or tax year beginning , 2009, and ending , 20

G Check all that apply: [ ] Initial return [ ] Initial return of a former public charity [ ] Final return
[ ] Amended return [ ] Address change [ ] Name change

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

Name of foundation: BERGERON FAMILY FOUNDATION

A Employer identification number: 03-0370623

Number and street (or P O box number if mail is not delivered to street address): C/O JOHN J. BERGERON, 167 OLD SCHOOLHOUSE ROAD — Room/suite:

B Telephone number (see page 10 of the instructions): (802) 863-4061

City or town, state, and ZIP code: SOUTH BURLINGTON, VT 05403

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: [X] 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) ▶ $ 1,870,714.

J Accounting method: [X] Cash [ ] Accrual
[ ] Other (specify) ____
(Part I, column (d) must be on cash basis.)

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) (see page 11 of the instructions).)*

		(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 (attach schedule)				
	2 Check ▶ [ ] if the foundation is **not** required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	48,497.	48,497.		ATCH 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-177,528.			
	b Gross sales price for all assets on line 6a 510,002.				
	7 Capital gain net income (from Part IV, line 2)				
	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) (attach schedule)				
	11 Other income (attach schedule)				
	12 **Total.** Add lines 1 through 11	-129,031.	48,497.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) [2]	1,375.	0.	0.	0.
	c Other professional fees (attach schedule) [3]	9,783.	9,783.		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) **	164.			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) [5]	670.	472.		
	24 **Total operating and administrative expenses.** Add lines 13 through 23	11,992.	10,255.	0.	0.
	25 Contributions, gifts, grants paid	101,524.			101,524.
	26 **Total expenses and disbursements.** Add lines 24 and 25	113,516.	10,255.	0.	101,524.
	27 Subtract line 26 from line 12				
	a **Excess of revenue over expenses and disbursements**	-242,547.			
	b **Net investment income** (if negative, enter -0-)		38,242.		
	c **Adjusted net income** (if negative, enter -0-)			-0-	

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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	4,880.	12,688.	12,688.
2	Savings and temporary cash investments	218,036.	56,159.	56,159.
3	Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
4	Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of 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			
10 a	Investments - U S and state government obligations (attach schedule) **	403,677.	257,167.	262,694.
b	Investments - corporate stock (attach schedule) ATCH 7	1,177,686.	1,122,311.	1,317,969.
c	Investments - corporate bonds (attach schedule) ATCH 8	99,369.	212,776.	221,204.
11	Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
12	Investments - mortgage loans			
13	Investments - other (attach schedule)			
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)	1,903,648.	1,661,101.	1,870,714.
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 (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)			
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. ▶ X			
27	Capital stock, trust principal, or current funds	1,903,648.	1,661,101.	
28	Paid-in or capital surplus, or land, bldg, and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds		0.	
30	**Total net assets or fund balances** (see page 17 of the instructions)	1,903,648.	1,661,101.	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	1,903,648.	1,661,101.	

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	1,903,648.
2	Enter amount from Part I, line 27a	2	-242,547.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,661,101.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,661,101.

**ATCH 6

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	SEE PART IV SCHEDULE			
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				
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				
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	-177,528.
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 pages 13 and 17 of 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? [X] 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 page 18 of 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))
2008			
2007			
2006			
2005			
2004			

2 **Total** of line 1, column (d)	2	
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	
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	
8 Enter qualifying distributions from Part XII, line 4	8	

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter ____________ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	765.
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	
3	Add lines 1 and 2	3	765.
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	765.
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a: 563.		
b	Exempt foreign organizations-tax withheld at source — 6b: 0.		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 0.		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments. Add lines 6a through 6d	7	563.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	202.
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 2010 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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ $ ______ (2) On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
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? *If "Yes," attach the statement required by General Instruction T.*	5		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?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ VT,			
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* ATTACHMENT 9	8b		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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

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

			Yes	No
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)	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 ▶ N/A

14 The books are in care of ▶ JOHN J. BERGERON Telephone no. ▶ 802 863-4061

Located at ▶ 167 OLD SCHOOLHOUSE ROAD SOUTH BURLINGTON, VT ZIP + 4 ▶ 05403

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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 2009?	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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ 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 page 20 of the instructions.)	2b	X	
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? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 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 2009.)*	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 2009?	4b		X

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

		Yes	No
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 page 22 of the 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			
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 page 22 of the instructions)?	**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? ☐ 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			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		X
If "Yes" to 6b, 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?	**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 (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATTACHMENT 10		-0-	-0-	-0-

2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the instructions). If none, enter "NONE."

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

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

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

3 Five highest-paid independent contractors for professional services (see page 23 of 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 ▶ NONE

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 N/A	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions 3 NONE	
Total. Add lines 1 through 3 ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,621,917.
b	Average of monthly cash balances	1b	145,881.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0.
d	**Total** (add lines 1a, b, and c)	1d	1,767,798.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,767,798.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	26,517.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,741,281.
6	**Minimum investment return.** Enter 5% of line 5	6	87,064.

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	87,064.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	765.		
b	Income tax for 2009. (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	765.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	86,299.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	86,299.
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	86,299.

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	101,524.
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	0.
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	101,524.
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	N/A
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	101,524.

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 2008	(c) 2008	(d) 2009
1	Distributable amount for 2009 from Part XI, line 7				86,299.
2	Undistributed income, if any, as of the end of 2009				
a	Enter amount for 2008 only			95,878.	
b	Total for prior years 20 07 ,20 06 ,20 05		524.		
3	Excess distributions carryover, if any, to 2009:				
a	From 2004				
b	From 2005				
c	From 2006				
d	From 2007				
e	From 2008 0.				
f	**Total** of lines 3a through e	0.			
4	Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 101,524.				
a	Applied to 2008, but not more than line 2a			95,878.	
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)		524.		
c	Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d	Applied to 2009 distributable amount				5,122.
e	Remaining amount distributed out of corpus	0.			
5	Excess distributions carryover applied to 2009 *(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				
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d	Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
e	Undistributed income for 2008. Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f	Undistributed income for 2009. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				81,177.
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9	**Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	0.			
10	Analysis of line 9				
a	Excess from 2005				
b	Excess from 2006				
c	Excess from 2007				
d	Excess from 2008				
e	Excess from 2009 0.				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, 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)

	Tax year	Prior 3 years			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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 page 28 of 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.

N/A

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 page 28 of 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

ATTACHMENT 11

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

REQUESTS FOR GRANTS SHOULD BE PRESENTED IN WRITING.

c Any submission deadlines

THERE ARE NO DEADLINES.

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

NONE

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 *Paid during the year*				
ATTACHMENT 12				
Total ▶ 3a				101,524.
b *Approved for future payment*				
Total ▶ 3b				

JSA
9E1491 1 000
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Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of 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	48,497.	
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	-177,528.	
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)				-129,031.	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 -129,031.

(See worksheet in line 13 instructions on page 28 to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 29 of the instructions.)
	NOT APPLICABLE

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.

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

Sign Here

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

[signature], Trustee | 4/29/10 | Trustee

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's signature [signature] CPA	Date 4/28/10	Check if self-employed ☐	Preparer's identifying number (See Signature on page 30 of the instructions) P00641183
Firm's name (or yours if self-employed), address, and ZIP code	DANAHER ATTIG & PLANTE PLC 150 KENNEDY DRIVE, PO BOX 2166 SOUTH BURLINGTON, VT 05407-2166	EIN 20-3682035 Phone no 802-383-0399	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		POWERSHARES DB COMMODITY					VAR	VAR
156.							156.	
		POWERSHARES DB COMMODITY					VAR	VAR
		712.					-712.	
		POWERSHARES DB COMMODITY - SEE ATTACHED						
							1,126.	
		SEE ATTACHED STATEMENT					VAR	VAR
151,784.		179,540.					-27,756.	
		SEE ATTACHED STATEMENT					VAR	VAR
358,062.		509,155.					-151,093.	
		POWERSHARES DB COMMODITY - SEE ATTACHED					VAR	VAR
							751.	
TOTAL GAIN(LOSS)							-177,528.	

ATTACHMENT 1

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
DOMESTIC DIVIDENDS	21,099.	21,099.
FOREIGN DIVIDENDS	4,546.	4,546.
U.S GOVERNMENT INTEREST	21,471.	21,471.
CORPORATE INTEREST	1,359.	1,359.
U.S. INTEREST FROM PARTNERSHIP	22.	22.
TOTAL	48,497.	48,497.

ATTACHMENT 2

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEES	1,375.			
TOTALS	1,375.	0.	0.	0.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
ASSET MANAGEMENT FEES	9,783.	9,783.
TOTALS	9,783.	9,783.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS
PRIOR YEAR FEDERAL EXCISE TAX	164.
TOTALS	164.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
POSTAGE/OFFICE	148.	
FOREIGN TAX PAID	343.	343.
BANK SERVICE CHARGES	50.	
OTHER PORTFOLIO DEDUCTIONS FROM PARTNERSHIP	129.	129.
TOTALS	670.	472.

BERGERON FAMILY FOUNDATION 03-0370623

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

ATTACHMENT 6

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
U.S. GOVERNMENT SECURITIES SEE ATTACHED SCHEDULE	257,167.	262,694.
US OBLIGATIONS TOTAL	257,167.	262,694.

FORM 990PF, PART II - CORPORATE STOCK

ATTACHMENT 7

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
CORPORATE STOCK AND MUTUAL FDS SEE ATTACHED SCHEDULE	1,122,311.	1,317,969.
TOTALS	1,122,311.	1,317,969.

FORM 990PF, PART II - CORPORATE BONDS

ATTACHMENT 8

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
CORPORATE BONDS - SEE ATTACHED SCHEDULE	212,776.	221,204.
TOTALS	212,776.	221,204.

AS OF DATE	SECURITY #	SECURITY NAME	UNITS HELD	CARRYING VALUE	TAX COST	MARKET VALUE
12/31/09	14912L4F5.00	CATERPILLAR FIN SE 6 125% 02/17/2014	25,000	28,057.50	28,057.50	27,938 50
12/31/09	369604AY9 00	GE COMPANY 5.00% 02/01/2013	25,000	24,987.50	24,987.50	26,449.00
12/31/09	46625HGY0 00	JPMORGAN CHASE & CO 6.00% 01/15/2018	15,000	16,264 50	16,264 50	16,124.85
12/31/09	683234WQ7 00	ONTARIO PROV CDA 4 5% 2/03/2015	25,000	25,437.50	25,437.50	26,399.00
12/31/09	31331VPE0 00	FED FARM CREDIT BK 4.750% 01/19/2010	20,000	19,910.60	19,910.60	20,037.60
12/31/09	31331VDN3.00	FED FARM CREDIT BK 4 770% 05/25/2011	80,000	79,458 40	79,458 40	84,300 00
12/31/09	949746JE2.00	WELLS FARGO & CO 5 125% 09/15/2016	20,000	17,939 60	17,939.60	19,955.00
		TOTAL CORPORATE BONDS		**212,055.60**	**212,055.60**	**221,203.95**
12/31/09	3133MRPX4 00	FEDERAL HME LN BK 4.625% 08/15/2012	20,000	19,896 80	19,896 80	21,506.30
12/31/09	3133MRCM2.00	FEDERAL HME LN BK 4.750% 08/13/2010	120,000	122,962.99	122,962.99	123,094.20
12/31/09	3133MJUQ1.00	FEDERAL HME LN BK 4.875% 11/15/2011	40,000	40,785 20	40,785.20	42,750.20
12/31/09	9128277L0.00	U S TREAS. BONDS 4 875% 2/15/12	70,000	73,521.88	73,521.88	75,343.10
		TOTAL U.S BONDS		**257,166.87**	**257,166.87**	**262,693.80**
12/31/09	2896207	ABERCROMB & FITCH CO CL A	340	8,622.13	8,622.13	11,849.00
12/31/09	H0023R105 00	ACE LTD	200	8,588.66	8,588.66	10,080.00
12/31/09	25816109	AMERICAN EXPRESS CO	545	25,110.53	25,110.53	22,083 40
12/31/09	37411105	APACHE CORPORATION	235	16,568 09	16,568 09	24,244.95
12/31/09	00206R102 00	AT&T INC	530	13,887.91	13,887.91	14,855.90
12/31/09	52769106	AUTODESK INC	760	12,225.40	12,225 40	19,311 60
12/31/09	88606108	BHP BILLITON LTD	140	6,766 03	6,766 03	10,721 20
12/31/09	166764100	CHEVRON CORPORATION	255	9,533.17	9,533.17	19,632.45
12/31/09	171798101	CIMAREX ENERGY CO	380	17,382.33	17,382 33	20,128 60
12/31/09	17275R102.00	CISCO SYSTEMS INC	1,085	19,214 97	19,214.97	25,974 90
12/31/09	189054109	CLOROX CO	330	17,486.76	17,486 76	20,130.00
12/31/09	192446102	COGNIZANT TECHNOLOGY SOLUTIONS CORP	580	14,607 54	14,607 54	26,291.40
12/31/09	194162103	COLGATE PALMOLIVE CO	200	12,757 34	12,757 34	16,430 00
12/31/09	25243Q205 00	DIAGEO PLC ADR	350	22,989.49	22,989 49	24,293.50
12/31/09	268648102	EMC CORPORATION/MASS	1,380	17,814 55	17,814.55	24,108 60
12/31/09	30161N101.00	EXELON CORP	250	11,997 63	11,997.63	12,217 50
12/31/09	302130109	EXPEDITORS INTL WASH INC	450	13,634 57	13,634.57	15,646.50
12/31/09	30231G102 00	EXXON MOBIL CORP	330	12,324.60	12,324 60	22,502.70
12/31/09	311900104	FASTENAL CO	320	10,714 22	10,714.22	13,324.80
12/31/09	363576109	GALLAGHER ARTHUR J & CO	520	13,006.34	13,006.34	11,705.20
12/31/09	428236103	HEWLETT PACKARD CO	320	11,522.75	11,522.75	16,483.20
12/31/09	437076102	HOME DEPOT INC	630	16,177.96	16,177 96	18,225.90
12/31/09	452308109	ILLINOIS TOOL WKS INC	390	14,120 05	14,120.05	18,716.10
12/31/09	464287564	ISHARES COHEN & STEERS RLTY	2,020	69,064.82	69,064.82	106,090.40
12/31/09	464287481	ISHARES RUSSELL MID CAP GROWTH	1,000	37,194.30	37,194.30	45,340.00

12/31/09	464287465	ISHARES TR MSCI EAFE INDEX FD	1,770	93,313 56	93,313.56	97,845.60
12/31/09	464287234	ISHARES TR MSCI EMERG MKT	550	24,900 33	24,900.33	22,825.00
12/31/09	464287648	ISHARES TR RUSL 2000 GROWTH	610	39,485.58	39,485 58	41,522.70
12/31/09	464287473	ISHARES TR RUSSELL MCP VL	450	19,122.42	19,122 42	16,627 50
12/31/09	464287101	ISHARES TR S&P 100 INDEX FUND	935	50,846 64	50,846 64	48,105.75
12/31/09	46625H100 00	J P MORGAN CHASE & CO	500	18,437 78	18,437 78	20,835.00
12/31/09	478160104	JOHNSON & JOHNSON CO	420	23,751 30	23,751.30	27,052 20
12/31/09	594918104	MICROSOFT CORPORATION	920	21,061 14	21,061 14	28,041.60
12/31/09	61166W101 00	MONSANTO CO NEW	130	13,065.68	13,065 68	10,627 50
12/31/09	66987V109.00	NOVARTIS A G SPONSORED ADR	430	19,494.25	19,494.25	23,404.90
12/31/09	704326107	PAYCHEX INC	540	13,143.93	13,143.93	16,545.60
12/31/09	713448108	PEPSICO INCORPORATED	310	15,357 61	15,357 61	18,848 00
12/31/09	716768106	PETSMART INC	585	11,330 79	11,330 79	15,613.65
12/31/09	73935S105.00	POWERSHARES DB CMDTY IDX TRA	750	27,846.37	17,020.37	18,465.00
12/31/09	742718109	PROCTER & GAMBLE CO	290	14,254.31	14,254.31	17,582.70
12/31/09	74834L100 00	QUEST DIAGNOSTICS INC COM	350	16,198.00	16,198 00	21,133 00
12/31/09	826552101	SIGMA-ALDRICH CORP COMMON	160	7,281.46	7,281.46	8,088.00
12/31/09	842587107	SOUTHERN CO	370	12,356 73	12,356 73	12,328.40
12/31/09	78462F103 00	SPDR S&P 500 ETF TRUST	400	55,531 52	55,531 52	44,576.00
12/31/09	857477103	STATE STREET CORP	300	13,138 08	13,138.08	13,062.00
12/31/09	863667101	STRYKER CORP	400	18,839.12	18,839 12	20,148.00
12/31/09	882508104	TEXAS INSTRUMENTS	680	11,274 40	11,274.40	17,720.80
12/31/09	883556102	THERMO FISHER SCIENTIFIC INC	215	9,776.22	9,776 22	10,253 35
12/31/09	H8817H100 00	TRANSOCEAN LTD ZUG	190	10,914.00	10,914 00	15,732.00
12/31/09	913017109	UNITED TECHNOLOGIES	340	15,129 60	15,129.60	23,599.40
12/31/09	902973304	US BANCORP DEL NEW	865	23,659.20	23,659.20	19,471.15
12/31/09	92343V104.00	VERIZON COMMUNICATIONS	400	12,586.07	12,586.07	13,252.00
12/31/09	254687106	WALT DISNEY CO	395	9,092 32	9,092 32	12,738.75
12/31/09	949746101	WELLS FARGO & CO NEW	590	10,725.70	10,725.70	15,924 10
12/31/09	98385X106 00	XTO ENERGY INC	350	13,015 87	13,015 87	16,285.50
12/31/09	988498101	YUM BRANDS INC	590	17,962.83	17,962 83	20,632 30
12/31/09	98956P102.00	ZIMMER HLDGS INC	270	17,522.45	17,522 45	15,959.70
12/31/09	88579Y101 00	3M CO	275	19,409.10	19,409.10	22,734.25
		TOTAL SECURITIES & MUTUAL FUNDS		**1,133,136.50**	**1,122,310.50**	**1,317,969.20**
12/31/09	87237U857 00	TD ASSET MGMT MONEY MKT INSTL SVC #5	53,304	53,304 10	53,304 10	53,304.10
12/31/09	87237U857 00	TD ASSET MGMT MONEY MKT INSTL SVC #5	2,610	2,609 50	2,609 50	2,609.50
		ACCRUED INCOME		244 95	244 95	244 95
		TOTAL MONEY MARKET		**56,158.55**	**56,158.55**	**56,158.55**
		TOTAL HOLDINGS AS OF 12-31-09		**1,658,517.52**	**1,647,691.52**	**1,858,025.50**

FORM 990PF, PART VII-A, LINE 8B - EXPLANATION OF NON-FILING

NO FILING IS REQUIRED.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 10

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION
PAUL U. BERGERON 38 ELM STREET WELLESLEY, MA 02481	TRUSTEE - AS REQUIRED
JOHN J. BERGERON 167 OLD SCHOOLHOUSE ROAD SOUTH BURLINGTON, VT 05403	TRUSTEE - AS REQUIRED
JANE B. GUYETTE 79 ALEXIS DRIVE BURLINGTON, VT 05401	TRUSTEE - AS REQUIRED
JAY BERGERON 337 GREAT PLAINS AVENUE NEEDHAM, MA 02492	TRUSTEE - AS REQUIRED
	GRAND TOTALS

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

BERGERON FAMILY FOUNDATION
JOHN BERGERON, 167 OLD SCHOOLHOUSE
SOUTH BURLINGTON, VT 05403
802 863-4061

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 12

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ALZHEIMER'S ASSOCIATION OF VT BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	1,500
COMMUNITY COLLEGE OF VERMONT BURLINGTON, VT	NO RELATIONSHIP EXEMPT	SCHOLARSHIP FUND	5,000
ST ANNE'S SHRINE ISLE LA MOTTE, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	2,500
CHILD CARING FOOD SHELF BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	524.
PAN MASS CHALLENGE NEEDHAM, MA	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	5,000.
PARTNERS IN ADVENTURE SHELBURNE, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	2,000.
MERCY CONNECTIONS BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	2,500.
ST. ANTHONY'S SHRINE BOSTON, MA	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	5,000.
ST. SEBASTIAN'S BOSTON, MA	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	5,000
LOYOLA UNIVERSITY BALTIMORE, MD	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	2,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 12 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
LIBRARY FUND OF NEEDHAM NEEDHAM, MA	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	2,000.
NEEDHAM EDUCATION FOUNDATION NEEDHAM, MA	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	2,000
SAINT MICHAEL'S COLLEGE COLCHESTER, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	25,000
FLETCHER FREE LIBRARY BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	1,500
ST MARK'S CHURCH BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	2,000
ST MARK'S RELIGIOUS EDUCATION BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	500.
FREEDOM FUND BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	500.
BISHOP'S FUND BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	5,000.
COMMITTEE ON TEMPORARY SHELTER BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	5,000
RICE MEMORIAL HIGH SCHOOL SOUTH BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	5,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 12 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
VISITING NURSE ASSOCIATION COLCHESTER, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	3,000
UNITED WAY OF CHITTENDEN COUNTY BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	5,000.
EDMUNDITE MISSIONS BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	2,500.
CHITTENDEN EMERGENCY FOOD SHELF BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	1,000.
SPECTRUM BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	1,000
VA BOSTON VOLUNTARY SERVICES BOSTON, MA	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	2,250
SISTERS OF CHARITY WELLESLEY, MA	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	1,000.
NEWTON WELLESLEY HOSPITAL WELLESLEY, MA	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	1,000.
BOSTON RESCUE MISSION BOSTON, MA	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	1,000
WELLESLEY FRIENDLY AID WELLESLEY, MA	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	1,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 12 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BOYS AND GIRLS CLUB BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	2,500.
ST MARK'S CHURCH HABITAT OUTREACH PROGRAM BURLINGTON, VT	NO RELATIONSHIP EXEMPT	GENERAL SUPPORT	750
		TOTAL CONTRIBUTIONS PAID	101,524

SCHEDULE D (Form 1041)

Department of the Treasury Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

OMB No. 1545-0092

2009

Name of estate or trust: BERGERON FAMILY FOUNDATION

Employer identification number: 03-0370623

Note: *Form 5227 filers need to complete only Parts I and II.*

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example. 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					

b	Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	-26,849.
2	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3	Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4	Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet	4	( )
5	**Net short-term gain or (loss).** Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back ▶	5	-26,849.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					

b	Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	-150,679.
7	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8	Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9	Capital gain distributions	9	
10	Gain from Form 4797, Part I	10	
11	Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet	11	( )
12	**Net long-term gain or (loss).** Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back ▶	12	-150,679.

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Part III **Summary of Parts I and II**
Caution: *Read the instructions* ***before*** *completing this part.*

			(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
13	**Net short-term gain or (loss)**	13			-26,849.
14	**Net long-term gain or (loss):**				
a	Total for year	14a			-150,679.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	14b			
c	28% rate gain	14c			
15	**Total net gain or (loss).** Combine lines 13 and 14a ▶	15			-177,528.

Note: *If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and* ***do not*** *complete Part IV If line 15, column (3), is a net loss, complete Part IV and the* ***Capital Loss Carryover Worksheet,*** *as necessary.*

Part IV **Capital Loss Limitation**

16 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the **smaller** of:
a The loss on line 15, column (3) **or** b $3,000 . . . 16 (3,000)

Note: *If the loss on line 15, column (3), is more than $3,000,* ***or*** *if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the* ***Capital Loss Carryover Worksheet*** *on page 7 of the instructions to figure your capital loss carryover*

Part V **Tax Computation Using Maximum Capital Gains Rates**

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), **and** Form 1041, line 22, is more than zero

Caution: *Skip this part and complete the worksheet on page 8 of the instructions if:*

- *Either line 14b, col. (2) or line 14c, col (2) is more than zero, or*
- *Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.*

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, **and** Form 990-T, line 34, is more than zero Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)	17	
18	Enter the **smaller** of line 14a or 15 in column (2) but not less than zero	18	
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19	
20	Add lines 18 and 19	20	
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0- ▶	21	
22	Subtract line 21 from line 20. If zero or less, enter -0-	22	
23	Subtract line 22 from line 17. If zero or less, enter -0-	23	
24	Enter the **smaller** of the amount on line 17 or $2,300	24	
25	Is the amount on line 23 equal to or more than the amount on line 24? ☐ **Yes.** Skip lines 25 and 26; go to line 27 and check the "No" box. ☐ **No.** Enter the amount from line 23	25	
26	Subtract line 25 from line 24	26	
27	Are the amounts on lines 22 and 26 the same? ☐ **Yes.** Skip lines 27 thru 30, go to line 31 ☐ **No.** Enter the **smaller** of line 17 or line 22	27	
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)	28	
29	Subtract line 28 from line 27	29	
30	Multiply line 29 by 15% (.15)	30	
31	Figure the tax on the amount on line 23. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	31	
32	Add lines 30 and 31	32	
33	Figure the tax on the amount on line 17. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	33	
34	**Tax on all taxable income.** Enter the **smaller** of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	34	

SCHEDULE D-1
(Form 1041)

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

▶ See instructions for Schedule D (Form 1041).
▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

OMB No. 1545-0092

2009

Name of estate or trust: BERGERON FAMILY FOUNDATION

Employer identification number: 03-0370623

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo., day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a POWERSHARES DB COMMODITY			156.		156.
SEE ATTACHED STATEMENT			151,784.	179,540.	-27,756.
POWERSHARES DB COMMODITY - SEE ATTACHED FORM 6781					751.

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b . . . . -26,849.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D-1 (Form 1041) 2009

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Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side	Employer identification number

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a POWERSHARES DB COMMODITY				712.	-712.
POWERSHARES DB COMMODITY - SEE ATTACHED FORM 6781					1,126.
SEE ATTACHED STATEMENT			358,062.	509,155.	-151,093.

6b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 6b . . . . -150,679.

TRUST YEAR ENDING 12/31/2009

TAX PREPARER: TAX
TRUST ADMINISTRATOR SJK
INVESTMENT OFFICER: SMP

LEGEND: F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
100.0000 AT&T INC - 00206R102 - MINOR = 450						
SOLD		09/30/2009	2696 93			
ACQ	100.0000	07/25/2008	2696.93	3141.27	-444 34	LT15
300.0000 AMGEN INC - 031162100 - MINOR = 424						
SOLD		11/04/2009	15707 33			
ACQ	75.0000	02/03/2006	3926.83	5594.25	-1667 42	LT15
	5.0000	03/23/2006	261.79	362.15	-100 36	LT15
	30.0000	09/19/2006	1570 73	2091 60	-520.87	LT15
	20.0000	06/19/2006	1047 16	1316 80	-269.64	LT15
	50.0000	03/11/2005	2617.89	2987.32	-369 43	LT15
	120.0000	11/25/2003	6282 93	7086.00	-803.07	LT15
100 0000 AUTODESK INC COM - 052769106 - MINOR = 437						
SOLD		09/30/2009	2362 86			
ACQ	100 0000	01/08/2009	2362.86	1927 00	435.86	ST
540 0000 BANK AMER CORP COM - 060505104 - MINOR = 417						
SOLD		02/13/2009	3040 18			
ACQ	70 0000	09/19/2006	394 10	3646 30	-3252.20	LT15
	407 0000	11/25/2003	2291 39	18783 05	-16491.66	LT15
	63 0000	02/03/2006	354 69	2723 49	-2368.80	LT15
200.0000 COGNIZANT TECHNLGY SLTNS COR - 192446102 - MINOR = 437						
SOLD		09/30/2009	7717.64			
ACQ	200 0000	03/07/2008	7717.64	5932.92	1784 72	LT15
768.7570 COLUMBIA VALUE & RESTRUCTURING FUND #2051 - 19765Y514 - MINOR = 496						
SOLD		03/12/2009	19318 86			
ACQ	768 7570	03/07/2008	19318.86	39821.62	-20502 76	LT15
1335.0000 DAVIS NY VENTURE FD INC CL Y FUND 909 - 239080401 - MINOR = 491						
SOLD		03/12/2009	26366 25			
ACQ	1335.0000	08/27/2008	26366 25	46911 90	-20545.65	ST
200 0000 EMC CORPORATION/MASS - 268648102 - MINOR = SAY						
SOLD		09/30/2009	3389 75			
ACQ	200 0000	02/03/2006	3389 75	2662 00	727 75	LT15
85000.0000 FEDERAL HME LN BK 5 480% 01/08/2009 DTD 01/08/99 - 3133M73G9 - MINOR = 058						
SOLD		01/08/2009	85000.00			
ACQ	85000 0000	12/22/2005	85000 00	86699.58	-1699 58	LT15
60000.0000 FEDERAL HME LN BK 4% 11/13/2009 DTD 11/12/2002 - 3133MTRK6 - MINOR = 058						
SOLD		11/13/2009	60000 00			
ACQ	40000.0000	11/12/2002	40000 00	39873.75	126 25	LT15
	20000 0000	11/12/2002	20000 00	19936.88	63 12	LT15
1168 1790 AMER FNDS GROWTH FND OF AMERICA FUND #405 F1 CLASS - 399874403 - MINOR = 491						
SOLD		01/08/2009	24403 26			
ACQ	1168 1790	10/06/2008	24403 26	27919.48	-3516 22	ST
410.0000 IMS HEALTH INC COM - 449934108 - MINOR = 426						
SOLD		06/24/2009	5116 54			
ACQ	410 0000	02/04/2009	5116.54	6238.11	-1121.57	ST
200.0000 ISHARES TR MSCI EMERG MKT - 464287234 - MINOR = 499						
SOLD		03/12/2009	4617 97			
ACQ	200 0000	03/07/2008	4617 97	9054.67	-4436 70	LT15
1500.0000 ISHARES TR MSCI EAFE INDEX FD - 464287465 - MINOR = 499						
SOLD		03/12/2009	51974 71			
ACQ	1500 0000	03/07/2008	51974 71	105555.00	-53580.29	LT15
300.0000 ISHARES TR RUSSELL MCP VL - 464287473 - MINOR = 488						
SOLD		03/12/2009	6614.96			
ACQ	300 0000	03/07/2008	6614.96	12748.28	-6133.32	LT15
990.0000 ISHARES RUSSELL MID CAP GROWTH - 464287481 - MINOR = 488						
SOLD		03/12/2009	28036 63			
ACQ	600.0000	03/07/2008	16991 90	30366.47	-13374 57	LT15
	390.0000	10/06/2008	11044 73	14505.78	-3461.05	ST
450.0000 ISHARES TR RUSL 2000 VALUE - 464287630 - MINOR = 488						
SOLD		03/10/2009	15179 22			
ACQ	450.0000	03/07/2008	15179.22	28579 23	-13400 01	LT15
200.0000 ISHARES TR RUSL 2000 GROWTH - 464287648 - MINOR = 488						
SOLD		03/12/2009	8493 95			
ACQ	200 0000	03/07/2008	8493 95	14247.98	-5754.03	LT15
255.0000 MOHAWK INDS INC - 608190104 - MINOR = 402						
SOLD		03/26/2009	8518 58			
ACQ	85 0000	07/10/2008	2839.53	5172.85	-2333 32	ST
	170 0000	03/04/2009	5679 05	3564 51	2114.54	ST
40 0000 MONSANTO CO NEW - 61166W101 - MINOR = 444						
SOLD		03/26/2009	3480 41			
ACQ	40 0000	08/27/2008	3480 41	4657 20	-1176 79	ST
795 0000 ORACLE CORPORATION - 68389X105 - MINOR = 437						
SOLD		01/08/2009	13826.40			
ACQ	55.0000	11/10/2006	956 54	1032.90	-76 36	LT15
	740.0000	07/27/2006	12869 86	11112.28	1757 58	LT15
40 0000 PROCTER & GAMBLE CO - 742718109 - MINOR = 411						
SOLD		07/07/2009	2072 37			
ACQ	39 0000	06/19/2006	2020 56	2144 61	-124 05	LT15
	1 0000	03/11/2005	51 81	53 11	-1 30	LT15
200.0000 RESEARCH IN MOTION LIMITED - 760975102 - MINOR = 439						
SOLD		06/24/2009	14125 28			
ACQ	200 0000	03/10/2009	14125 28	7810 82	6314 46	ST
100 0000 RESEARCH IN MOTION LIMITED - 760975102 - MINOR = 439						
SOLD		11/04/2009	5786 97			
ACQ	100 0000	03/10/2009	5786 97	3905 41	1881 56	ST

ACCT N571 660059015
FROM 01/01/2009
TO 12/31/2009

TD BANK, N A.
STATEMENT OF CAPITAL GAINS AND LOSSES
BERGERON FAM IRREV FDN AGT FOR TTEE

TRUST YEAR ENDING 12/31/2009

RUN 03/01/2010
11 40:30 AM

TAX PREPARER· TAX
TRUST ADMINISTRATOR SJK
INVESTMENT OFFICER: SMP

LEGEND F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
280.0000 SEMPRA ENERGY COMMON - 816851109 - MINOR = 454						
SOLD		07/07/2009	13497 02			
ACQ	200.0000	04/18/2008	9640 73	11449 76	-1809.03	LT15
	80 0000	03/04/2009	3856 29	3181 32	674 97	ST
80.0000 SIGMA-ALDRICH CORP COMMON - 826552101 - MINOR = 444						
SOLD		03/26/2009	3168.92			
ACQ	80 0000	08/27/2008	3168.92	4627 20	-1458.28	ST
100 0000 SOUTHERN CO - 842587107 - MINOR = 453						
SOLD		09/30/2009	3157 01			
ACQ	100.0000	01/08/2009	3157 01	3538 00	-380.99	ST
275.0000 TARGET CORP COM - 87612E106 - MINOR = 405						
SOLD		01/08/2009	10288 18			
ACQ	45.0000	03/11/2005	1683 52	2344 50	-660.98	LT15
	25 0000	06/19/2006	935.29	1227 00	-291.71	LT15
	205 0000	11/25/2003	7669.37	8005 25	-335.88	LT15
310 0000 UNITED PARCEL SERVICE - 911312106 - MINOR = 435						
SOLD		03/10/2009	12693 93			
ACQ	310.0000	02/04/2009	12693 93	14009.61	-1315.68	ST
525.0000 WALGREEN CO - 931422109 - MINOR = 407						
SOLD		07/07/2009	15276 63			
ACQ	50 0000	03/11/2005	1454 92	2216 73	-761.81	LT15
	147 0000	02/03/2006	4277 46	6429.78	-2152 32	LT15
	15 0000	06/19/2006	436 48	647 85	-211 37	LT15
	55 0000	11/10/2006	1600 41	2334 20	-733 79	LT15
	258 0000	11/25/2003	7507 37	9522 78	-2015 41	LT15
980 0000 WESTERN UN CO COM - 959802109 - MINOR = 437						
SOLD		03/10/2009	10894 99			
ACQ	980 0000	02/04/2009	10894 99	13489.90	-2594 91	ST
100.0000 XTO ENERGY INC - 98385X106 - MINOR = 415						
SOLD		09/30/2009	4126 71			
ACQ	100 0000	02/04/2009	4126 71	3718 82	407.89	ST
210 0000 YUM BRANDS INC - 988498101 - MINOR = 403						
SOLD		03/26/2009	6214.24			
ACQ	210 0000	03/07/2008	6214 24	7423.25	-1209.01	LT15
290 0000 RENAISSANCE RE HLDGS LTD - G7496G103 - MINOR = 419						
SOLD		05/27/2009	12680 62			
ACQ	190 0000	01/08/2009	8307.99	9578.09	-1270 10	ST
	50.0000	03/26/2009	2186 31	2460.46	-274 15	ST
	50 0000	02/13/2009	2186 31	2323 82	-137.51	ST
		TOTALS	509845 30	688694 89		

Short-term	151,783.35	179,540.28	<27,756.93>
Long-term	358,061.95	509,154.61	<151,092.66>
	509,845.30	688,694.89	<178,849.59>

Form **6781**

Department of the Treasury
Internal Revenue Service

Gains and Losses From Section 1256 Contracts and Straddles

▶ Attach to your tax return.

OMB No 1545-0644

2009

Attachment Sequence No **82**

Name(s) shown on tax return: BERGERON FAMILY FOUNDATION

Identifying number: 03-0370623

Check all applicable boxes (see instructions)
A ☐ Mixed straddle election
B ☐ Straddle-by-straddle identification election
C ☐ Mixed straddle account election
D ☐ Net section 1256 contracts loss election

Part I Section 1256 Contracts Marked to Market

	(a) Identification of account	(b) (Loss)	(c) Gain
1	POWERSHARES DB COMMODITY		1,877
2	Add the amounts on line 1 in columns (b) and (c) . . . 2	(0)	1,877

		Line	Amount
3	Net gain or (loss) Combine line 2, columns (b) and (c)	3	1,877
4	Form 1099-B adjustments See instructions and attach schedule	4	
5	Combine lines 3 and 4	5	1,877
	Note: *If line 5 shows a net gain, skip line 6 and enter the gain on line 7 Partnerships and S corporations, see instructions*		
6	If you have a net section 1256 contracts loss and checked box D above, enter the amount of loss to be carried back Enter the loss as a positive number	6	
7	Combine lines 5 and 6	7	1,877
8	**Short-term capital gain or (loss).** Multiply line 7 by 40% (40) Enter here and include on the appropriate line of Schedule D (see instructions)	8	751
9	**Long-term capital gain or (loss).** Multiply line 7 by 60% (60) Enter here and include on the appropriate line of Schedule D (see instructions)	9	1,126

Part II Gains and Losses From Straddles. Attach a separate schedule listing each straddle and its components

Section A—Losses From Straddles

	(a) Description of property	(b) Date entered into or acquired	(c) Date closed out or sold	(d) Gross sales price	(e) Cost or other basis plus expense of sale	(f) Loss If column (e) is more than (d), enter difference Otherwise, enter -0-	(g) Unrecognized gain on offsetting positions	(h) Recognized loss. If column (f) is more than (g), enter difference Otherwise, enter -0-
10						0		0
						0		0

		Line	Amount
11 a	Enter the short-term portion of losses from line 10, column (h), here and include on the appropriate line of Schedule D (see instructions)	11a	( )
b	Enter the long-term portion of losses from line 10, column (h), here and include on the appropriate line of Schedule D (see instructions)	11b	( )

Section B—Gains From Straddles

	(a) Description of property	(b) Date entered into or acquired	(c) Date closed out or sold	(d) Gross sales price	(e) Cost or other basis plus expense of sale	(f) Gain. If column (d) is more than (e), enter difference Otherwise, enter -0-
12						0
						0

		Line	Amount
13 a	Enter the short-term portion of gains from line 12, column (f), here and include on the appropriate line of Schedule D (see instructions)	13a	
b	Enter the long-term portion of gains from line 12, column (f), here and include on the appropriate line of Schedule D (see instructions)	13b	

Part III Unrecognized Gains From Positions Held on Last Day of Tax Year. Memo Entry Only (see instructions)

	(a) Description of property	(b) Date acquired	(c) Fair market value on last business day of tax year	(d) Cost or other basis as adjusted	(e) Unrecognized gain If column (c) is more than (d), enter difference Otherwise, enter -0-
14					0
					0
					0

Election Permitting Private Foundation to Avoid Excise Tax for Failure to Distribute Income IRC Section 4942(h)(2)

Section 4942(h)(2) Election

BERGERON FAMILY FDN, elects pursuant to Section 4942(h)(2) of the Internal Revenue Code and Reg. § 53.4942(a)-3(d)(2) to treat qualifying distributions for the current tax year ended 12/31/2009, in excess of the undistributed income of the immediately preceding taxable year as being made from the UNDISTRIBUTED INCOME OF PRIOR YEARS as follows:

Income	Tax Year	Amount
UNDISTRIBUTED	2006	524.
Total		524.

John A. Bergeron, Trustee
Signature of Officer, Director or Trustee

Trustee
Title

4/29/10
Date