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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.

2009

OMB No 1545-0052

and ending For calendar year 2009, or tax year beginning G Check all that apply: Final return Initial return Initial return of a former public charity Amended return Address change Name change Name of foundation A Employer identification number Use the IRS label. Otherwise, EVERETT FOUNDATION FOR AGED PERSONS INC 04-2062107 Number and street (or P O box number if mail is not delivered to street address) Room/suite print B Telephone number or type. 600 617 536-4868 C/O ROBERT BOYNTON 581 BOYLSTON ST See Specific City or town, state, and ZIP code C If exemption application is pending, check here Instructions. 1. Foreign organizations, check here BOSTON, MA 02116-3683 Foreign organizations meeting the 85% test, check here and attach computation H Check type of organization: X Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust _____ Other taxable private foundation If private foundation status was terminated I Fair market value of all assets at end of year | J Accounting method: | X | Cash Accrual under section 507(b)(1)(A), check here Other (specify) (from Part II, col (c), line 16) If the foundation is in a 60-month termination 2,453,026. (Part I, column (d) must be on cash basis) ▶\$ under section 507(b)(1)(B), check here Analysis of Revenue and Expenses
(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) (d) Disbursements for charitable purposes (cash basis only) Part I (b) Net investment (c) Adjusted net (a) Revenue and expenses per books income income Contributions, gifts, grants, etc., received N/A Check If the foundation is not required to attach Sch. B Interest on savings and temporary cash investments 761 761 STATEMENT 80,710. 80,710. STATEMENT Dividends and interest from securities 5a Gross rents b Net rental income or (loss) <109,516.b 6a Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a 777,715. 0. 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain Income modifications ő b Less Cost of goods sold c Gross profit of (loss) MAY 2 1 2010 Ö RS 11 Other income Add lines <28,045. 81 471 1_through-1-1 Compensation of officers, directors, trustees, etc. 8,550 0 8,550. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees **b** Accounting fees STMT 3 9,000 4,500 4,500. c Other professional fees 17 Interest <1,636. 0 0. STMT 4 18 19 Depreciation and depletion 20 Occupancy Travel, conferences, and meetings 22 Printing and publications STMT 5 27,230 24,231 2,999. 23 Other expenses 24 Total operating and administrative 28,731 16,049. 43,144 expenses. Add lines 13 through 23 139,350 139,350. 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 155,399. Add lines 24 and 25 182,494 28,731 27 Subtract line 26 from line 12: <210,539. a Excess of revenue over expenses and disbursements 52,740 b Net investment income (if negative, enter -0-) N/A c Adjusted net income (if negative, enter -0-) LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions. Form **990-PF** (2009)

1 Detail numbers - bearing 10 Detail numbers - bearing 15 Age	Fo	rm 99	0-PF (2009) EVERETT FOUNDATION FOR		INC 04-	2062107 Page 2
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Page			disqualified persons			
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b investments - corporate stock			Less; allowance for doubtful accounts ▶			
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4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 2, 140, 991.					 	
5 Decreases not included in line 2 (itemize) ► 5 0. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 2,140,991.						
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 2,140,991.						
	-			oluma (h) lisa 00		
	<u>b</u>	ıotal	net assets or juno parances at end of year (line 4 minus line 5) - Part II, co	Diurnn (a), ilne 30		2,140,991. Form 990-PF (2009)

923511 02-02-10

		RETT FOUNDATION and Losses for Tax on I			NS	INC		<u> </u>	2107	Page 3
		ribe the kind(s) of property sold (e. rehouse; or common stock, 200 st			(b) I	low acquired - Purchase - Donation		acquired day, yr.)	(d) Dat (mo., da	e sold ay, yr.)
<u>1a</u>	SHORT TERM - SI	EE ATTACHED				P				
_t	LONG TERM - SEI	E ATTACHED				P				
_(<u> </u>		<u> </u>		ļ					
	<u> </u>									
_6	·				<u> </u>					
	(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale				Gain or (loss) is (f) minus (
a	101,074.			98,99	9.				2	,075.
_b	676,641.		<u> </u>	788,23	2.				<111	,591.
_0	3									
_d										
_e)		1							
_	Complete only for assets showing	g gain in column (h) and owned by	the foundation	n on 12/31/69				Col. (h) gain		
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	. , ,	col. (j), if any		co		not less than (from col. (
a	1								2	,075.
b)								2 <111	,591.
_0										
<u>d</u>	l									
<u>e</u>										
2	Capital gain net income or (net cap	$ \begin{cases} \text{If gain, also ente} \\ \text{If (loss), enter -0} \end{cases} $			}	2			<109	,516.
3	Net short-term capital gain or (loss If gain, also enter in Part I, line 8, o	s) as defined in sections 1222(5) a								-
	If (loss), enter -0- in Part I, line 8	• •				3		N/A		
F	Part V Qualification U	nder Section 4940(e) for	r Reduced	Tax on Net	Inve	estment Inc	ome			
if s Wa	or optional use by domestic private section 4940(d)(2) applies, leave the as the foundation liable for the sections, the foundation does not quality.	is part blank. ion 4942 tax on the distributable an	nount of any ye	ear in the base peri		.)			Yes [X No
1		ach column for each year; see instr			s.					
	(a) Base period years Calendar year (or tax year beginnin	(b) Adjusted qualifying dis	stributions	Net value of nor	(c) nchar	itable-use assets		Distrib (col. (b) divi	(d) ution ratio ded by col. ((c))
	2008		3,557.		2	509,237		··		3226
	2007		6,237.	-		706,723				6638
_	2006		2,099.			621,674				6573
	2005		6,106.			648,091				3845
	2004		9,450.			718,724				4971
	Total of line 1, column (d) Average distribution ratio for the 5	i-vear base period - divide the total	on line 2 by 5	or by the number of	of ve	ırs	2		. 24	15253
•	the foundation has been in existen		on mio 2 o o,	or by mo number	o. yo.		3		.04	9051
4	Enter the net value of noncharitable	e-use assets for 2009 from Part X,	line 5				4	:	<u>2,257,</u>	431.
5	Multiply line 4 by line 3						5		110,	729.
6	Enter 1% of net investment income	e (1% of Part I, line 27b)					6			<u>527.</u>
7	Add lines 5 and 6						7		111,	256.
8	Enter qualifying distributions from						8		155,	399.
	If line 8 is equal to or greater than See the Part VI instructions.	line 7, check the box in Part VI, line	t 1b, and comp	lete that part using	a 1%	tax rate.			_	

Part VI Excise Tax Based on Investment Income (Section 4940(p), 4940(p), 4940(p), or 4948 - see instructions)		1990-PF (2009) EVERETT FOUNDATION FOR AGED PERSONS INC 04-206	<u> 2107</u>		Page 4
Dates of ruling or determination letter:	Pa	ert VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see	instr	ıctio	ns)
b Domestic foundations that meet the section 4947(e) requirements in Part V, check here X 3 527. of Part I, Line 127b All other domestic foundations enter 2% of line 27th. Eximple foreign organizations enter 4% of Part I, Line 12, col. (b) 2	1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1.			
b Domestic foundations that meet the section 4947(e) requirements in Part V, check here X 3 527. of Part I, Line 127b All other domestic foundations enter 2% of line 27th. Eximple foreign organizations enter 4% of Part I, Line 12, col. (b) 2		Date of ruling or determination letter: (attach copy of letter if necessary-see instructions)			
of Part I, line 27b All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, cot. (b) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 Add lines 1 and 2 5	b			_ 5	27.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) Add lines 1 and 2 Subtitle A (mcome) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) Tax based on investment income Subtract line 4 from line 3.1 Zeto or less, enter -0- Tax based on investment income Subtract line 4 from line 3.1 Zeto or less, enter -0- Exempt foreign organizations -1 saw withheld a source Exempt foreign organizations -1 saw withheld a source Tax pad with application for extension of time to file (Form 8868) Exempt foreign organizations -1 saw withheld a source Tax due, it file total of lines 5 and 6 s more than line 7, enter amount owed Enter any penalty for underpayment of estimated tax. Check here □ if Form 2220 is attached Tax due, it file total of lines 5 and 6 s more than line 7, enter amount ower paid Tax due, it file total of lines 5 and 6 s more than line 7, enter amount ower paid Total credits and payments. And lines 6 at through 6d Enter any penalty for underpayment of estimated tax. Check here □ if Form 2220 is attached Tax due, it file total or lines 5 and 6 s more than line 7, enter amount ower paid Total credits and payments. And lines 6 at through 6d Enter than pound of hore 10 lines for Enter 10 and 10 lines 5 and 6, enter the amount overpaid Total credits and payments. And lines 6 at through 6d Enter than pound of hore 10 lines for Enter 10 and 10 lines 5 and 6, enter the amount overpaid Total credits and payments. And lines 6 at through 6d Enter than pound of hore 10 lines for Enter 10 and 10 lines 5 and 6, enter the amount overpaid Total credits and 10 lines 10					
3	C	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
Subtilia A (income) lax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 5.27.	2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0- 6 Credits/Payments: 2009 estimated tax payments and 2008 overpayment credited to 2009 6 Exempt foreign organizations - tax withheld at source 6 Tax paid with application for extension of time to life (Forn 8588) 6 Eactup withholding erroreously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here I if Forn 2220 is attached 8 Enter any penalty for underpayment of estimated ax. Check here I if Forn 2220 is attached 9 Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Tax deep 10 to extreme 10 t	3	Add lines 1 and 2		5	27.
6 Cardis/Payments: a 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to tile (Form 8868) 6e d Sackup withfolding erroreously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any pearably for underspayment of estimated tax. Check here I if Form 2220 is attached 9 Tax dae. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax dae. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Octavity I is more than 1 total of lines 5 and 8, enter the amount overpaid 12 During the tax year, did the foundation attempt to influence any netional, state, or local legislation or did it participate or intervene in any political campaign? 1a During the tax year, did the foundation attempt to influence any netional, state, or local legislation or did it participate or intervene in any political campaign? 1b During the tax is very at the 1 or 1 th, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. 1b L X 1c I I I I I I I I I I I I I I I I I I I	4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
a 2009 estimated tax payments and 2008 overpayment credeted to 2009 b Exempt foreign organizations - tax withheld at source c 1ax paid with application for extension of time to file (Form 8668) d Backup withholding erroneously withheld c 7 760. 8 Enter any penalty for underpayment of estimated tax. Check here if form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment, If line? I smore than the total of lines 5 and 8, enter the amount owed 10 Overpayment, If line? I smore than the total of lines 5 and 8, enter the amount ower 10 Overpayment, If line? I smore than the total of lines 5 and 8, enter the amount owerpaid 11 Enter the amount of line 10 to be; Credited to 2010 estimated tax 233. Refunded 11 0. Part VII-A Statements Regarding Activities 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or miervene in any political campaign? 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or miervene in any political campaign? 14 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or miervene in any political campaign? 15 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or miervene in any political campaign? 16 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or miervene in any political campaign? 16 During the tax year, did the foundation attended to the foundation of the activities. 19 During the tax year, did the foundation in connection with the activities. 20 During the tax year is 'Yes,' attach a detailed description of the activities. 21 During the tax year is 'Yes,' attach a detailed description of the activities. 22 During the foundation negaged in any activities that hav	5	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	<u>27.</u>
b Exempt foreign organizations - tax withheld at source	6				
c Tax paid with application for extension of time to file (Form 8668) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here I if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line?, enter amount owed 9 Toverpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Fine the amount of line 10 to bic. Credited to 2010 estimated tax Payment 11 to 0. Part VIII-A Statements Regarding Activities 1a During the tax year, dot the foundation attempt to influence any national, state, or local legislation or did it participate or intervere in any political campaign? 1a During the tax year, dot the foundation attempt to influence any national, state, or local legislation or did it participate or intervere in any political campaign? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 11, 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-PDL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation. Pay S O. (2) On foundation managers. S O. Enter the rambursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. S O. Has the foundation made any changes, not previously reported to the IRS? If "Yes," attach a distaled description of the activities of the state of the sta	а	2009 estimated tax payments and 2008 overpayment credited to 2009 6a 760.			
d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Center the amount of line 10 to be: Credited to 2910 estimated tax ▶ 233. Refunded ▶ 11 0. Part VII-A Statements Regarding Activities 1 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? 1 bit of it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1 the answer is "Yes" to 1a or 1b, affach a defailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. 2 bit is spend more than \$100 during the year? 3 center the amount (if any) of tax on polltical expenditures (section 4955) imposed during the year: 3 center the remiburisement (if any) paid by the foundation dispenditures (section 4955) imposed during the year: 3 center the remiburisement (if any) paid by the foundation dispenditures (section 4955) imposed during the year: 4 center the remiburisement (if any) paid by the foundation dispenditures (section 4955) imposed during the year: 4 center the remiburisement (if any) paid by the foundation dispenditures (section 4956) imposed during the year: 4 center the remiburisement (if any) paid by the foundation dispenditures (section 4956) imposed during the year? 4 center the remiburisement (if any) paid by the foundation dispenditures (section single propenditures tax imposed on foundation dispenditures (section single propenditures tax in	b	Exempt foreign organizations - tax withheld at source			
7 760. 8 Enter any penalty for underpayment of estimated tax. Check here ☐ If Form 2220 is attached 9 Tax due. If the fotal of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owed 11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ▶ 233. Retunded ▶ 11 0.233. 11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ▶ 233. Retunded ▶ 10 233. 11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ▶ 233. Retunded ▶ 11 0. Part VII-A Statements Regarding Activities 14 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? 15 Dud it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for delinition)? 16 If the answer is "Yes" to 1s or 1b, attach a detailed description of the activities. 17 Dud the foundation file Form 1120-POL for this year? 18 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 19 On the foundation file Form 1120-POL for this year? 20 Enter the reimbursement (if any) of tax on political expenditures (section 4955) imposed during the year: 21 Has the foundation engaged in any activities that have not previously been reported to the IRS? 22 X 23 S. Retunded ▶ 16 X 24 Extraction the activities 25 D. (2) On foundation managers. ▶ \$ 0. 2 26 Enter the reimbursement (if any) of tax on political expenditures (section 4955) imposed during the year: 29 Has the foundation made any changes, not previously reported to the IRS? 20 Yes there a liquidation, termmation, dissolution, or substantial contraction during the year? 21 For the reimbursement required by General Instruction 7 in the year? 22 For the campaign in the governing instrument, or substantial contraction during the year? 23 For the requirements of sections 508(e) (relating to sections 4941	C	Tax paid with application for extension of time to file (Form 8868)			
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached ■ 9 1 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ■ 10 10 verpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ■ 11 10 233. 11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ■ 233. Refunded ■ 11 10 0. Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervier in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervier in any political campaign? 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b Line answer is "Yes" to 1a or 1b, attach a detailed description of the activities. 1c Did it be foundation life Form 1120-POL for they ser? 2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation in Erom 1120-POL for they ser? 2 Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ■ 5 3 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. 3 Has the foundation have unrelated business gross income of \$1,000 or more during the year? 1 Ves, "attach the statements of "Yes," attach a confirmed copy of the changes 3 X 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 1 Ves," attach the statement required by General Instruction 1. A rethe requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 9 Sy state legislation that effectively amends the governing instrument so that no mandatory directio	d	Backup withholding erroneously withheld 6d			
S Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 0 verpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 10 0 .				7	<u>60.</u>
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11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ▶ 233	9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
Part VIII-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 opticidal campaign?			_	2	
1a During the lax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campagin? 1b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes (see instructions for definition)? 11 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. 1c Did the foundation life Form 1120-PDL for this year? 1d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ O. (2) On foundation managers. ► \$ O. 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 1f "Yes," attach a detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS? 1f "Yes," attach a detailed description of the activities. 3 Has the foundation have unrelated business gross income of \$1,000 or more during the year? 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 1f "Yes," attach a liquidation, termination, dissolution, or substantial contraction during the year? 1f "Yes," attach the statement required by General Instruction T. 4a Ab S 4b If "Yes," attach the statement required by General Instruction T. 5 Are the requirements of section \$50(c) (relating to sections 4941 through 4945) salisfied either; 6 By language in the governing instrument, or 6 Py state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? 7 Did the foundation have at least \$5,000 in assets at any time during the year? 1f "Yes," complete Part II, col. (c), and Part XV. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) 1 If the answer is "Yes" to					<u>0.</u>
any political campaign? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? if the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. c Did the foundation file Form 1120-PQL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ 0 . (2) On foundation managers. ► \$ 0. e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0. 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bytaws, or other similar instruments? If "Yes," attach a detailed discription of the activities. 4 Did the foundation have unrelated business gross income of \$1,000 or more during the year? If "Yes," attach the statement required by General Instruction T. A the 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, 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, 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, or By state legislation that effectively amends the governing instrument so that no mandatory direction	Pa	rt VII-A Statements Regarding Activities			
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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 lile Form 1120-POL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0. 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 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 4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 8 If "Yes," as it filed a tax return on Form 990-T for this year? 9 Wy A the statech the statement required by General Instruction T. Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 9 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, or 9 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, or 9 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. 8 Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA b If the answer is "Yes" to line 7, has t			1a		X
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Form **990-PF** (2009)

orm 990-PF (2009) EVERETT FOUNDATION FOR A			04-20621	07 Page 6
Part VII-B Statements Regarding Activities for Which	Form 4/20 May Be	Requirea (contir	oued)	
5a During the year did the foundation pay or incur any amount to:	4045(-)\0	П.,		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section			es X No	
(2) Influence the outcome of any specific public election (see section 4955);	or to carry on, directly or indir		[]	
any voter registration drive?	~0		es X No	
(3) Provide a grant to an individual for travel, study, or other similar purpose		Y	es Lalino	
(4) Provide a grant to an organization other than a charitable, etc., organization	on described in Section	₹ v		
509(a)(1), (2), or (3), or section 4940(d)(2)?			es 🔲 No	
(5) Provide for any purpose other than religious, charitable, scientific, literary	, or educational purposes, of		es X No	
the prevention of cruelty to children or animals?			es Las No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify ur		in Regulations		
section 53.4945 or in a current notice regarding disaster assistance (see instr			▶ ┌── ├	5b X
Organizations relying on a current notice regarding disaster assistance check				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption	from the tax decause it mainta		🗀	
expenditure responsibility for the grant?	45.5(1)	X Y	es L No	
If "Yes," attach the statement required by Regulations section 53 494	• •			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on		[1 2]	
a personal benefit contract?		Y6	es X No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a	personal benefit contract?		<u> </u>	6b X
If "Yes" to 6b, file Form 8870.	-h-llt		s X No	
7a At any time during the tax year, was the foundation a party to a prohibited tax		Y6		
b If yes, did the foundation receive any proceeds or have any net income attribu		· · · · · · · · · · · · · · · · · · ·		7b
Part VIII Information About Officers, Directors, Trust	tees, roundation Ma	inagers, riigni	,	
List all officers, directors, trustees, foundation managers and their	compensation		· ·	
Elot all officero, an octors, a actoos, roundation managers and then	1	(c) Compensation	(d) Contributions to employee benefit plans	(e) Expense
(a) Name and address	(b) Title, and average hours per week devoted to position	(If not paid,	ano oeterreo	(e) Expense account, other allowances
	to position	enter -0-)	compensation	allowalices
	_			
SEE STATEMENT 12	_	8,550.	0.	0.
SEE STRIEMENT IZ		0,550.	0.	
				
	_			
	-			
	_			
Compensation of five highest-paid employees (other than those inc	l cluded on line 1). If none.	enter "NONE."		<u></u>
	(b) Title, and average		(d) Contributions to	(e) Expense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE	dovoted to position		Companadon	unomanooo
NONE				
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otal number of other employees paid over \$50,000	<u></u>			
Ottal manipul of online employees paid over googless	 		Form	990-PF (2009)
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Part VIII Information About Officers, Directors, Trustees, Found		2062107 Page 7
Faid Employees, and Contractors (continued)		
3 Five highest-paid independent contractors for professional services. If none, ent		
(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 stati	stical information such as the	
number of organizations and other beneficiaries served, conferences convened, research papers pro	oduced, etc.	Expenses
1 N/A		
2		
3		
4		
Det IV DIO		
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year or	n lines 1 and 0	A
	nines rand 2.	Amount
1 <u>N/A</u>		
•		
2		
All other program-related investments. See instructions.		
All other program-related investments. See instructions.		

Form **990-PF** (2009)

0.

Total. Add lines 1 through 3

P	art X Minimum Investment Return (All domestic foundations must complet	e this part. Foreign four	ndations,	see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purpos	es:		····
a	Average monthly fair market value of securities		1a	2,091,910.
	Average of monthly cash balances		1b	199,898.
	Fair market value of all other assets		1c	
d	Total (add lines 1a, b, and c)		1d	2,291,808.
е	Reduction claimed for blockage or other factors reported on lines 1a and			<u> </u>
	1c (attach detailed explanation)	0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	2,291,808.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instruction	ns)	4	34,377.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	,	5	2,257,431.
6	Minimum investment return Enter 5% of line 5		6	112,872.
P	part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private foreign organizations check here and do not complete this part.)	e operating foundations an	d certain	
1	Minimum investment return from Part X, line 6		1	112,872.
2a	Tax on investment income for 2009 from Part VI, line 5	527.		<u> </u>
b	Income tax for 2009. (This does not include the tax from Part VI.)			
C	Add lines 2a and 2b		2c	527.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	112,345.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	112,345.
6	Deduction from distributable amount (see instructions)		6	0.
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	112,345.
P	art XII Qualifying Distributions (see instructions)			
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26		1a	155,399.
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., purpos	ses	2	
3	Amounts set aside for specific charitable projects that satisfy the:		ł	
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	e 4	4	155,399.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment			
	income. Enter 1% of Part I, line 27b		5	527.
6	Adjusted qualifying distributions. Subtract line 5 from line 4		6	154,872.
	Note. The amount on line 6 will be used in Part V. column (b), in subsequent years when calculating	whether the foundation o	ualifies for	the section

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4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

		- · · · · · · · · · · · · · ·		
	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI,				
line 7				112,345.
2 Undistributed income, if any, as of the end of 2009			100 450	
a Enter amount for 2008 only			122,458.	
b Total for prior years:		.		
3 Excess distributions carryover, if any, to 2009:		0.		
a From 2004				
b From 2005	1			
c From 2006				
d From 2007	İ			
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from				
Part XII, line 4: ▶\$ 155,399.				
a Applied to 2008, but not more than line 2a	İ		122,458.	
b Applied to undistributed income of prior			122/1300	
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			
d Applied to 2009 distributable amount		-		32,941.
e Remaining amount distributed out of corpus	0.			32,741.
5 Excess distributions carryover applied to 2009	0.			0.
(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:				
& 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	į			
deficiency has been issued, or on which the section 4942(a) tax has been previously				
assessed		0.		
d Subtract line 6c from line 6b. Taxable	" -			
amount - see instructions		0.		
e Undistributed income for 2008. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2010				79,404.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004				
not applied on line 5 or line 7	0.			
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				
				Form 000 DE (2000)

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Part XIV Private Operating F	Oundations (see in			<u>U4-20</u>	62107 Page 10
1 a If the foundation has received a ruling of	•		-A, question 9)	N/A	
foundation, and the ruling is effective fo		, , ,	_		
b Check box to indicate whether the found	•		un contion	4942(j)(3) or 494	42(j)(5)
2 a Enter the lesser of the adjusted net	Tax year	ing touridation described	Prior 3 years	4342())(3) 01 434	42(J)(3)
income from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
investment return from Part X for	(4)	(-,	1 (-,	(4)	(0) 10121
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	İ				
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 Info	rmation (Comple	te this part only	if the foundation	had \$5.000 or mo	re in assets
at any time during t					
1 Information Regarding Foundation	n Managers:				
a List any managers of the foundation wh	o have contributed more	than 2% of the total conti	ributions received by the t	oundation before the close	e of any tax
year (but only if they have contributed n	nore than \$5,000). (See s	ection 507(d)(2).)			•
NONE					
b List any managers of the foundation wh			or an equally large portio	n of the ownership of a par	rtnership or
other entity) of which the foundation has	s a 10% or greater interes	st.			
NONE					
2 Information Regarding Contributi					
Check here 🕨 🗶 if the foundation o					
the foundation makes gifts, grants, etc.	(see instructions) to indiv	viduals or organizations u	nder other conditions, co	mplete items 2a, b, c, and o	d
a The name, address, and telephone num	ber of the person to whor	m applications should be	addressed:		
				<u> </u>	
b The form in which applications should b	e submitted and informat	tion and materials they sh	nould include:		
a Any gubmicaion dondliness					
c Any submission deadlines:					
d Any restrictions or limitations on awards	s, such as by geographica	al areas, charitable fields.	kınds of institutions, or of	her factors:	
-		•	•		
					000 55
923601 02-02-10		4.0		F	orm 990-PF (2009)

3 Grants and Contributions Paid During the You	ear 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
	or substantial contributor	recipient		
a Paid during the year				
	4			
				•
	;			
SEE STATEMENT 13				
Total			▶ 3a	139,350.
b Approved for future payment				
				ı
NONE				
			-	
		ļ		
Total				0.
Total			▶ 3b	U.

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

Enter gross amounts unless otherwise indicated.	Unrelated	business income		d by section 512, 513, or 514	(e)
	(a) Business	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income
1 Program service revenue:	code		code		
a	- 				
b					
c	l l				
d		·	+ +		
e	_				
g Fees and contracts from government agencies	-	-	+ +		· · ·
2 Membership dues and assessments					· · · · · ·
3 Interest on savings and temporary cash			1 -		
investments			14	761.	
4 Dividends and interest from securities		_	14	80,710.	
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					<109,516.>
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b		·			
C	_				
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0		81,471.	<109,516.>
13 Total. Add line 12, columns (b), (d), and (e)				13	<u><28,045.</u> >
(See worksheet in line 13 instructions to verify calculations.))				

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

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).					
		- -				
						
923621 02-02-10	Form 99	0-PF (2009)				

OIII 990-PF (20	U9) EVERETT	FOUNDATION_	FUR AGED	PERSONS	INC	04-206210/	Pag
Part XVII	Information Regard	ding Transfers To	and Transac	tions and Re	elationships '	With Noncharitable	
	Evernt Organizati	one					

ı	טום נו	ie organization directly or moi	irectly engage in any of the follow	ving with	any other organiz	ation described if	section 50 I(c) of		162	140
	the C	ode (other than section 501(c	c)(3) organizations) or in section	527, rela	iting to political or	ganizations?				
	a Trans	fers from the reporting found	lation to a noncharitable exempt	organiza ⁴	tion of:					
	(1)	Cash						1a(1)		X
	(2)	Other assets						1a(2)		Х
	b Other	transactions:								
	(1) 3	Sales of assets to a noncharita	ible exempt organization					1b(1)		X
	(2) F	Purchases of assets from a no	oncharitable exempt organization	J				1b(2)		X
	(3) F	Rental of facilities, equipment,	or other assets					1b(3)		Х
	(4) F	Reimbursement arrangements	;					1b(4)		X
	(5) l	oans or loan guarantees						1b(5)		Х
	(6) F	Performance of services or me	embership or fundraising solicita	tions				1b(6)		Х
	c Shari	ng of facilities, equipment, ma	ailing lists, other assets, or paid e	employee	es			1c		Х
	d if the	answer to any of the above is	"Yes," complete the following sc	hedule. (Column (b) should	always show the	fair market value of the goods, o	ther ass	ets,	
							action or sharing arrangement, st			
	colun	nn (d) the value of the goods,	other assets, or services receive	:d.						
(a	Line no	(b) Amount involved	(c) Name of noncharital	ble exem	pt organization	(d) Desc	ription of transfers, transactions, and s	haring arr	angeme	nts
			N/A	·						
_										
							·- ··			
						-				
							7,000			
							-			
2	a Is the	foundation directly or indirect	tly affiliated with, or related to, or	ne or mo	re tax-exempt orga	anizations describ	ed			
			r than section 501(c)(3)) or in se				[-	Yes	X	l No
		s," complete the following sch								,
		(a) Name of org		(b) T	ype of organizatio	n	(c) Description of relationsh	.p		
		N/A								
_				\top					-	
				1		-				
		A • • •	- · · · · · · · · · · · · · · · · · · ·		-		pest of my knowledge and belief, it is tr	ие, соттес	ot,	
	and con	oplete Declaration of preparer (other	er than taxpayer or fiduciary) is based of	n all inform						
		> larka			16 May 0	70/0	Treasurer			
Here	🖊 🖫	gnature of officer or trustee			Date	Title				
Ĕ		Preparer's	100			Date	Check if Preparer	s identify:	ıng numt	per
ğ	- 's' >	signature /	Thin				self- employed >			
,,	Paid eparel se On	Firm's name (or yours ROBE		PA			EIN ▶		_	
	Paid Preparer's Use Only		BOYLSTON STREE		ITE 600					
			ON MA 02116-36				Phone no. 617-5	36-4	4868	3
								n 990 -		
									,	•

923622

•							
FORM 990-PF INTEREST ON SAV	INGS A	ND TEM	PORARY C	ASH II	NVESTMENTS	STATEMENT	1
SOURCE						AMOUNT	
MONEY MARKET						7	61.
TOTAL TO FORM 990-PF, PART I,	, LINE	3, CO	LUMN A			7	61.
FORM 990-PF DIVIDENI	OS AND	INTER	EST FROM	SECUI	RITIES	STATEMENT	2
SOURCE		GROSS	AMOUNT		ITAL GAINS IVIDENDS	COLUMN (A AMOUNT)
CORP BONDS STOCKS US TREASURY	•		42,493. 17,336. 20,881.	0. 0. 0.	. 17,3		
COTAL TO FM 990-PF, PART I, LN 4		80,710.			0.	80,710	
FORM 990-PF	AC	COUNTI	NG FEES			STATEMENT	3
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INV MENT IN	EST- COME	(C) ADJUSTED NET INCOM		
ACCOUNTING		9,000.	4	,500.		4,5	00.
TO FORM 990-PF, PG 1, LN 16B		9,000.	4	,500.		4,5	00.
FORM 990-PF		TAX	ES		· · · · · · · · · · · · · · · · · · ·	STATEMENT	4
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INVI MENT INC		(C) ADJUSTED NET INCOM		
FEDERAL EXCISE TAX	<:	1,636.	>	0.			0.
- TO FORM 990-PF, PG 1, LN 18	<:	1,636.	>	0.			0.

FORM 990-PF	OTHER E	XPENSES	S'	PATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSE	282.			282.
INSURANCE TRUSTEE MEETING EXPENSE	1,850. 782.	0.		1,850. 782.
MA FILING FEE	85.	Ŏ.		85.
BANK MANAGEMENT FEE	24,231.	24,231.		0.
TO FORM 990-PF, PG 1, LN 23	27,230.	24,231.		2,999.
	FOOTN	OTES	S	PATEMENT (

FORM 990-PF U.S. AND STATE	E/CITY GOV	ERNMENT	OBLIGATIONS	STATEMENT 7
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US GOVERNMENT - LIST ATTACHED	X		338,032.	381,538.
TOTAL U.S. GOVERNMENT OBLIGATIONS	5		338,032.	381,538.
TOTAL STATE AND MUNICIPAL GOVERNM	MENT OBLIG	ATIONS		
TOTAL TO FORM 990-PF, PART II, LI	NE 10A		338,032.	381,538.
FORM 990-PF C	CORPORATE	STOCK		STATEMENT 8
DESCRIPTION			BOOK VALUE	FAIR MARKET VALUE
CORP STOCK - LIST ATTACHED			750,215.	846,074.
TOTAL TO FORM 990-PF, PART II, LI	NE 10B		750,215.	846,074.
FORM 990-PF C	CORPORATE	BONDS		STATEMENT 9
DESCRIPTION			BOOK VALUE	FAIR MARKET VALUE
CORP BONDS - LIST ATTACHED			973,955.	1,013,336.
TOTAL TO FORM 990-PF, PART II, LI	NE 10C		973,955.	1,013,336.
FORM 990-PF	OTHER AS	SETS		STATEMENT 10
DESCRIPTION	BEGINNI YR BOOK		END OF YEAR BOOK VALUE	FAIR MARKET VALUE
RECEIVABLE FOR SECURITIES SOLD		0.	98,577.	98,577.
TO FORM 990-PF, PART II, LINE 15		0.	98,577.	98,577.

FORM 990-PF	OTHER LIABILITIES		STAT	EMENT 11
DESCRIPTION		BOY AMOUN	T EOY	AMOUNT
PAYABLE FOR SECURITIES PUR		0.		
TOTAL TO FORM 990-PF, PART	r II, LINE 22		0.	133,289.
	II - LIST OF OFFICERS, D FEES AND FOUNDATION MANA		STAT	EMENT 12
NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	
GEORGE AHLIN 21 TRENTON STREET MELROSE, MA 02176	PRESIDENT, DIR	ECTOR 2,650.	0.	0.
MARJORIE L. DACKO 7 FOSTER STREET EVERETT, MA 02149	CLERK, DIRECTO	R 2,400.	0.	0.
DR. PETER SAPIENZA 105 GOVERNOR AVENUE MEDFORD, MA 02155	DIRECTOR 1.00	300.	0.	0.
ALFRED SEAWARD 12 HAVERHILL ROAD ATKINSON, NH 03811	DIRECTOR 1.00	0.	0.	0.
LAURA WHITE 109 CLEVELAND AVENUE EVERETT, MA 02149	DIRECTOR 1.00	400.	0.	0.
DR. LAURA CARMAN 8 PLATO TERRACE WINCHESTER, MA 01890	TREASURER, DIRI	ECTOR 2,400.	0.	0.
NANCY GIARDINO 57 BLAINE STREET MALDEN, MA 02148	DIRECTOR 1.00	400.	0.	0.
TOTALS INCLUDED ON 990-PF,	PAGE 6, PART VIII	8,550.	0.	0.

FORM 990-PF GI	RANTS AND CONTRIBUTIONS PAID DURING THE YEAR	STATEMENT 13
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP I AND PURPOSE OF GRANT	RECIPIENT STATUS AMOUNT
CAMBRIDGE HEALTH ALLIANCE	NURSES ACTIVITIES WITHIN EVERETT	60,000.
COMMUNITY FAMILY	HELP FOR EVERETT SENIORS	5,000.
COUNCIL OF AGING	ACTIVITIES FOR EVERETT SENIORS	45,000.
EVERETT REHAB	HELP FOR EVERETT SENIORS	1,430.
HALLMARK HOSPICE	HELP FOR EVERETT SENIORS	2,500.
SALVATION ARMY	HELP FOR EVERETT SENIORS	5,000.
WOODLAWN NURSING HOMES	HOLIDAY ACTIVITIES & AMBULANCE TOURS FOR RESIDENTS	5,920.
MYSTIC VALLEY HEALTH	HELP FOR EVERETT SENIORS	10,000.

EVERETT FOUNDATION FOR AGED PERSONS INC

04-2062107

VNA HOSPICE

HELP FOR EVERETT SENIORS

4,500.

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

139,350.

EVERETT FOUNDATION FOR AGED PERSONS INC FORM 990-PF PART II LINES 10a and 10c

INVESTMENT	BOOK VALUE 01-01-09	BOOK VALUE 12-31-09	MKT VALUE 12-31-09
US TREASURY 6.25% DUE 8-15-23	190,018	190,018	226,932
US TREASURY SEC STRIPPED 2-15-18	18,128	19,283	25,596
US TREASURY 3.5% 11-15-09	24,927	0	0
US TREASURY 2.375% 08-31-10	50,990	50,990	50,662
US TREASURY 3.125% 09-30-13	51,588	51,588	51,965
FEDERAL FARM CR BK 4.125% 04/15/09	50,248	0	0
FEDERAL FARM CR BK 4.32% 06/28/13	49,484	0	0
FEDERAL HOME LN BKS 5.00% 05-13-11	26,152	26,152	26,383
FEDERAL HOME LN BKS 4.80% 04-30-15	74,953	0	0
LINE 10a US & STATE GOVERNMENT	\$536,488	\$338,032	\$381,538
ABBOTT LABS 5.875% 05-15-16	50,253	50,253	55,150
BURLINGTON NORTHN SANTA FE 5.65%	49,238	49,238	53,219
CATERPILLAR FINL SVCS 4.7% 03/15/12	24,922	24,922	26,378
CITIGROUP INC 6.2% 3-15-09	49,567	0	0
CREDIT SUISSE 5.3% 08-13-19	0	50,440	51,349
DTE ENERGY CO 5.2% 10-15-12	50,430	50,430	53,686
FHLMC #250608 6.5% 7-01-26	1,488	666	750
FHLMC #E20271 7.0% 11-01-11	623	314	328
FNMA #433230 6.0% 07-01-28	1,542	1,070	1,172
FHLMC #C00647 6.50% 09-01-28	1,971	1,564	1,673
FHLMC GOLD POOL #C21764 6% 02-01-29	4,199	3,602	3,905
FNMA #909695 5.4% 03/02/12	85,422	65,444	69,087
FREDDIE MAC 3.875% 01-12-09	98,961	0	0
FEDERAL HOME LN MTG 4.75% 12/08/10	50,125	50,125	51,938
FEDERAL HOME LN MTG 2.125% 03-23-12	0	74,980	76,148
FNMA 3.25% 08-12-10	0	77,199	76,336
FNMA 2.75% 02-05-14	0	74,815	75,844
FEDERAL HOME LN MTC 3 500% 04-13-12	0	50,747	50,907
FEDERAL HOME LN MTG 2.500% 04-23-14	0	49,631	49,971 50,725
FNMA 2.000% 01-09-12 GENERAL ELECTRIC 5.0% 02-01-13		50,566 25,700	50,735
GEORGIA PWR CO 5.7% 06/01/17	25,700 49,890	25,700 40,800	26,449 54,254
JP MORGAN CHASE & CO 6.75% 02-01-11	50,294	49,890 50,294	54,254 52,743
MANITOBA PROV CANADA 7.5% 02-22-10	49,844	49,844	52,743 50,455
MERCK & CO INC 6.4% 03-01-28	22,762	22,762	27,581
MERRILL LYNCH & CO 5.45% 7-15-14	49,861	22,702	27,381
UNITED TECHNOLOGIES 5.375% 12-15-17	49,461	49,461	53,283
LINE 10c CORPORATE BONDS	\$766,548	\$973,955	\$1,013,336
THE 100 COM CHAIL DONDO	=========	==========	=========

EVERETT FOUNDATION FOR AGED PERSONS INC FORM 990-PF PART II LINES 10b

STOCK	BOOK VALUE 01-01-09	BOOK VALUE 12-31-09	MKT VALUE 12-31-09
3M COMPANY	9,424	0	0
ABBOTT LABS	0	5,439	5,402
ACCENTURE LTD BERMUDA	7,333	7,333	8,300
ADOBE SYS INC	0	4,644	5,517
AMERICAN EXPRESS CO	7,659	0	0
AMPHENOL CORP	0	4,656	4,498
WYETH (AMER HOME PRODS)	17,499	0	0
APACHE CORP	0	7,956	10,317
APPLE INC	0	10,264	10,537
AT&T INC	6,616	10,148	8,409
AUTOMATIC DATA PROCESSING IN	9,675	0	0
AVON PRODS INC	0	4,003	4,725
AXIS CAP HLDGS LTD	0	4,282	4,239
CELANESE CORP	0	6,433	6,800
CHEVRON CORP	0	23,477	23,097
CISCO SYS INC	6,124	6,124	9,576
COCA COLA CO	11,737	11,737	14,250
COLGATE PALMOLIVE CO	8,340	8,340	12,323
DEAN FOODS CO	0	1,891	1,804
DIRECTTV	0	3,348	3,392
DISCOVER FINL SVCS	0	4,466	4,530
DISNEY WALT CO	0	5,504	6,450
DOVER CORP	0	4,203	4,216
DU PONT EI DE NEMOURS & CO	9,179	0	0
ECOLAB INC	7,600	0	0
EMC CORP	0	6,846	6,988
EMERSON ELEC CO	11,643	11,643	17,040
EOG RES INC	0	4,898	4,958
COLUMBIA FDS SER(EXCELSIOR IN	158,516	0	0
EXELON CORP `	0	4,783	4,887
EXXON MOBIL CORP	14,734	14,734	23,867
FORTUNE BRANDS INC	9,976	0	0
FPL GROUP INC	0	5,491	5,282
GENERAL ELECTRIC CO	20,723	11,676	4,539
HEWLETT PACKARD CO	0	13,856	15,453
IBM	4,085	4,085	13,090
ILLINOIS TOOL WKS INC	12,077	. 0	0
INTEL CORP	17,537	7,798	7,140
ISHARES TR DOW JONES US FINL	13,452	, O	0
ISHARES TR MSCI EAFE INDEX FD	150,406	179,711	164,734
ISHARES TR S&P 500 INDEX FD	19,932	0	0
JOHNSON & JOHNSON	12,382	12,382	19,323
JP MORGAN CHASE & CO	0	10,939	12,501

LINE 10b CORPORATE STOCKS	\$834,642 ========	\$750,215 ======	\$846,074 =======
1 OIN DIVUIADO HAO		J,291	J,240
WESTERN UNION CO YUM BRANDS INC	7,091 0	7,091 5,291	7,540 5,246
WELLS FARGO & CO	18,076	12,658	13,495
WASTE MGMT INC	0	0	0
WAL MART STORES INC	10,404	10,404	10,690
WALGREEN CO	13,700	0	0
VERIZON COMMUNICATIONS INC	7,172	0	0
US BANCORP	0	7,594	9,004
UNITED TECHNOLOGIES CORP	5,576	5,576	27,764
UNITED PARCEL SVC INC	0	2,882	2,914
THERMO FISHER SCIENTIFIC CORP	0	4,805	4,766
TEXAS INSTRS INC	0	5,241	5,172
TEVA PHARMACUETICAL LTD	0	0	0
TARGET CORP	16,592	16,592	14,511
SYSCO CORP	11,071	0	0
STRYKER CORP	7,988	5,325	10,074
STATE STREET CORP	0	4,153	4,354
STAPLES INC	0	6,538	7,377
SEMPRA ENERGY	0	5,670	5,471
SCHLUMBERGER LTD	7,118	0	0
ROYAL DUTCH SHELL PLC	12,178	0	0
RIO TINTO PLC	0	5,420	5,690
PRINCIPAL FINL GROUP INC	0	4,853	5,118
PNC FINL SVCS GROUP INC	0	5,653	5,279
PFIZER INC	0	7,001	7,185
PEPSICO INC	11,119	11,119	15,200
PACKAGING CORP	0	2,327	2,369
OCCIDENTAL PETE CORP	0	6,353	8,135
NOVARTIS AG SPONS ADR	10,216	0	0
NORTHERN TR CORP	10,961	10,961	10,480
NORDSTROM INC	0	3,388	3,758
NOBLE CORP	0	4,111	4,358
NEWS CORP LTD CL A	9,843	0	. 0
NAVISTAR INTL CORP	0	3,860	3,972
NABORS INDS INC	0	4,421	5,026
MYLAN INC	0	1,854	1,852
MONSANTO CO	0	8,598	8,175
MIDCAP SPDR TR	93,983	93,983	124,890
MICROSOFT CORP	17,838	17,838	18,288
MEDTRONIC INC	17,071	0	0
MEDCO HLTH SOLUTIONS	0	4,839	4,792
MCKESSON CORP	0	4,052	6,250
LOWES COS INC	0	6,366	7,017
LOCKHEED MARTIN CORP	0	7,560	7,765
LÁBORATORY CORP	0	7,520	7,544
KIMBERLY CLARK CORP	0	5,241	6,371

EVERETT FOUNDATION FOR AGED PERSONS INC FORM 990-PF PART IV CAPITAL GAINS AND LOSSES FOR THE YEAR ENDED 12-31-09

STOCK	PURCHASE	SALE	s		SA	LES	
	DATE	DATE	L	SHS	PROCEEDS	COST	GAIN/(LOSS)
FEDERAL HOME LN BKS 4 80% 04-30	- 05-06-08	04-30-09	S	75000	75,000	74,953	47
PFIZER INC	10-16-09	11-04-09	S	0.5	75,000	74,955	47 (0)
HESS CORP	05-29-09	11-30-09	Š	150	8,842	9,164	(323)
ENTERGY CORP	05-29-09	12-31-09	š	100	8,220	7,361	859
TEVA PHARMACEUTICAL LTD	05-29-09	12-31-09	Š	100	5,621	4,656	966
WASTE MGMT INC	05-29-09	12-31-09	s	100	3,382	2,857	526
TOTAL SHORT TERM GAINS/(LOSSE	S)				\$101,074	\$98,999	\$2,075
				==:			
FREDDIE MAC 3 875% 01/12/09	05-04-04	01-12-09	L	100000	100,000	98,961	1,039
FHLMC #C00647 6 50% 09-01-28	09-14-98	01-15-09	L	20 08	20	20	(0)
FHLMC #E20271 7 0% 11-01-11	11-14-96	01-15-09	L	43 7	44	44	(0)
FHLMC GOLD POOL #C21764 6% 02-	C 02-11-99	01-15-09	L	237 89	238	235	3
FEDERAL FARM CR BK 4 32% 06/28/1	:11-23-07	01-22-09	L	50000	50,000	49,484	516
FHLMC #250608 6 5% 7-01-26	09-12-96	01-26-09	L	6 2	6	6	0
FNMA #433230 6 0% 07-01-28	07-14-98	01-26-09	L	4 57	5	4	0
FNMA #909695 5 4% 03/02/12	03-29-07	01-26-09	L	908 24	908	902	7
FHLMC #C00647 6 50% 09-01-28	09-14-98	02-17-09	L	23 53	24	24	(0)
FHLMC #E20271 7 0% 11-01-11	11-14-96	02-17-09	L	36 99	37	37	(0)
FHLMC GOLD POOL #C21764 6% 02-	02-11-99	02-17-09	L	12 71	13	13	o´
FHLMC #250608 6 5% 7-01-26	09-12-96	02-25-09	L	7 16	7	7	0
FNMA #433230 6.0% 07-01-28	07-14-98	02-25-09	Ĺ	4 23	4	4	Ö
FNMA #909695 5 4% 03/02/12	03-29-07	02-25-09	L	2144 04	2,144	2,128	16
CITIGROUP INC 6 2% 3-15-09	05-01-01	03-16-09	Ĺ	50000	50,000	49,567	434
FHLMC #C00647 6 50% 09-01-28	09-14-98	03-16-09	Ĺ	35 26	35	36	(0)
FHLMC #E20271 7 0% 11-01-11	11-14-96	03-16-09	Ĺ	20 38	20	20	(0)
FHLMC GOLD POOL #C21764 6% 02-0		03-16-09	Ĺ	21 51	22	21	0
FHLMC #250608 6 5% 7-01-26	09-12-96	03-25-09	Ē	149 97	150	144	6
FNMA #433230 6 0% 07-01-28	07-14-98	03-25-09	Ē	4 62	5	5	0
FNMA #909695 5 4% 03/02/12	03-29-07	03-25-09	Ĺ	1567 91	1,568	1,556	12
FEDERAL FARM CR BK 4 125% 04/15/		04-15-09	Ĺ	50000	50,000	50,248	(248)
FHLMC #C00647 6 50% 09-01-28	09-14-98	04-15-09	Ĺ	41 16	41	42	(1)
FHLMC #E20271 7 0% 11-01-11	11-14-96	04-15-09	Ē	24 18	24	24	(0)
FHLMC GOLD POOL #C21764 6% 02-0		04-15-09	Ē	13 7	14	14	0
FHLMC #250608 6 5% 7-01-26	09-12-96	04-27-09	Ē	10 39	10	10	0
FNMA #433230 6 0% 07-01-28	07-14-98	04-27-09	Ē	5 26	5	5	0
FNMA #909695 5 4% 03/02/12	03-29-07	04-27-09	Ĺ	1256 7	1,257	1,247	9
FHLMC #C00647 6 50% 09-01-28	09-14-98	05-15-09	Ĺ	45 39	45	46	(1)
FHLMC #E20271 7 0% 11-01-11	11-14-96	05-15-09	1	19 56	20	20	
FHLMC GOLD POOL #C21764 6% 02-0		05-15-09	Ĺ	9 35	9		(0)
FHLMC #250608 6 5% 7-01-26	09-12-96	05-15-09	Ĺ	6.38		9	0
FNMA #433230 6 0% 07-01-28	07-14-98	05-26-09			6	6	0
FNMA #909695 5 4% 03/02/12	03-29-07	05-26-09	L L	4 64	5 2.575	5	0
				2575 07	2,575	2,556	19
COLUMBIA FDS SER (EXCELSIOR INT AMERICAN EXPRESS CO		05-27-09	L	8,013 26	87,345	158,516	(71,171)
DU PONT EI DE NEMOURS & CO	05-02-01	05-29-09	L	200	4,893	7,659	(2,766)
	05-02-01	05-29-09	L	200	5,650	9,179	(3,529)
FORTUNE BRANDS INC	01-28-08	05-29-09	L	150	5,317	9,976	(4,660)
ILLINOIS TOOL WKS INC	03-04-04	05-29-09	L	300	10,087	12,077	(1,989)
INTEL CORP	05-02-01	05-29-09	L	350	5,392	9,739	(4,347)
ISHARES TR DOW JONES US FINL	01-28-08	05-29-09	L	154	6,606	13,452	(6,845)
ISHARES TR S&P 500 INDEX FD	11-15-06	05-29-09	L	144	13,173	19,932	(6,760)
NOVARTIS AG SPONS ADR	01-28-08	05-29-09	L	200	8,059	10,216	(2,156)
ROYAL DUTCH SHELL PLC	11-22-00	05-29-09	L	200	10,561	12,178	(1,618)
SCHLUMBERGER LTD	09-04-01	05-29-09	L	200	10,759	4,829	5,930
STRYKER CORP	10-10-01	05-29-09	L	100	3,873	2,663	1,211
SYSCO CORP	05-02-01	05-29-09	L	400	9,414	11,071	(1,657)
WALGREEN CO	05-23-07	05-29-09	L	300	9,212	13,700	(4,488)
WELLS FARGO & CO	08-16-02	05-29-09	L	200	5,115	5,418	(303)
FHLMC #C00647 6 50% 09-01-28	09-14-98	06-15-09	L	56 93	57	58	(1)
FHLMC #E20271 7 0% 11-01-11	11-14-96	06-15-09	L	19.22	19	19	(0)

FHLMC GOLD POOL #C21764 6% 02	-(02-11-99	06-15-09	L	14 19	14	14	0
FHLMC #250608 6 5% 7-01-26	09-12-96	06-25-09	L	6 82	7	7	0
FNMA #433230 6 0% 07-01-28	07-14-98	06-25-09	L	4 04	4	4	0
FNMA #909695 5 4% 03/02/12	03-29-07	06-25-09	L	2091 3	2,091	2,076	15
FHLMC #C00647 6 50% 09-01-28	09-14-98	07-15-09	L	42 46	42	43	(1)
FHLMC #E20271 7 0% 11-01-11	11-14-96	07-15-09	L	27 89	28	28	(0)
FHLMC GOLD POOL #C21764 6% 02	-(02-11-99	07-15-09	L	246 6	247	244	3
FHLMC #250608 6 5% 7-01-26	09-12-96	07-27-09	L	291 26	291	280	11
FNMA #433230 6 0% 07-01-28	07-14-98	07-27-09	Ļ	236 79	237	231	5
FNMA #909695 5 4% 03/02/12	03-29-07	07-27-09	L	3054 34	3,054	3,032	22
FHLMC #C00647 6 50% 09-01-28	09-14-98	08-17-09	L	26 93	27	27	(0)
FHLMC #E20271 7 0% 11-01-11	11-14-96	08-17-09	L	18 39	18	18	(0)
FHLMC GOLD POOL #C21764 6% 02	-(02-11-99	08-17-09	L	8 96	9	9	0
MERRILL LYNCH & CO 5 45% 7-15-14		08-19-09	L	50000	50,232	49,861	372
FHLMC #250608 6 5% 7-01-26	09-12-96	08-25-09	L	112 82	113	108	4
FNMA #433230 6 0% 07-01-28	07-14-98	08-25-09	L	3 88	4	4	0
FNMA #909695 5 4% 03/02/12	03-29-07	08-25-09	L	1890 96	1,891	1,877	14
FHLMC #C00647 6 50% 09-01-28	09-14-98	09-15-09	L	33 16	33	34	(0)
FHLMC #E20271 7 0% 11-01-11	11-14-96	09-15-09	Ļ	18 18	18	18	(0)
FHLMC GOLD POOL #C21764 6% 02		09-15-09	L	9 02	9	9	0
FHLMC #250608 6 5% 7-01-26	09-12-96	09-25-09	L	146 53	147	141	6
FNMA #433230 6 0% 07-01-28	07-14-98	09-25-09	L	203 04	203	198	5
FNMA #909695 5 4% 03/02/12	03-29-07	09-25-09	L	1174 04	1,174	1,165	9
FHLMC #C00647 6 50% 09-01-28	09-14-98	10-15-09	L	26 19	26	27	(0)
FHLMC #E20271 7 0% 11-01-11	11-14-96	10-15-09	L	42 54	43	43	(0)
FHLMC GOLD POOL #C21764 6% 02		10-15-09	L	9 06	9	9	0
WYETH (AMER HOME PRODS)	05-02-01	10-16-09	L	300	15,076	17,499	(2,423)
FHLMC #250608 6 5% 7-01-26	09-12-96	10-26-09	L	109 38	109	105	4
FNMA #433230 6.0% 07-01-28	07-14-98	10-26-09	L	5 31	5	5	0
FNMA #909695 5.4% 03/02/12	03-29-07	10-26-09	Ł	809 18	809	803	6
FHLMC #C00647 6 50% 09-01-28	09-14-98	11-16-09	L	25 44	25	26	(0)
FHLMC #E20271 7 0% 11-01-11	11-14-96	11-16-09	L	19 37	19	19	(0)
FHLMC GOLD POOL #C21764 6% 02		11-16-09	L	10.43	10	10	0
US TREASURY 3 5% 11-15-09	11-23-04	11-16-09	L	25000	25,000	24,927	73
FHLMC #250608 6 5% 7-01-26	09-12-96	11-25-09	L	3 91	4	4	0
FNMA #433230 6 0% 07-01-28	07-14-98	11-25-09	L	3 2	3	3	0
FNMA #909695 5 4% 03/02/12	03-29-07	11-25-09	L	1368 55	1,369	1,358	10
FHLMC #C00647 6 50% 09-01-28	09-14-98	12-15-09	L	24 65	25	25	(0)
FHLMC #E20271 7 0% 11-01-11	11-14-96	12-15-09	L	16.37	16	16	(0)
FHLMC GOLD POOL #C21764 6% 02		12-15-09	L	10 5	11	10	0
ISHARES TR MSCI EAFE INDEX FD	09-15-06	12-21-09	L	650	36,464	52,380	(15,916)
FHLMC #250608 6 5% 7-01-26	09-12-96	12-28-09	L	3 91	4	4	0
FNMA #433230 6 0% 07-01-28	07-14-98	12-28-09	L	3 22	3	3	0
FNMA #909695 5 4% 03/02/12	03-29-07	12-28-09	L	1285 14	1,285	1,276	9
3M COMPANY	08-15-02	12-31-09	L	150	12,483	9,424	3,060
AUTOMATIC DATA PROCESSING INC		12-31-09	L	200	8,633	9,675	(1,043)
ECOLAB INC	05-02-01	12-31-09	L	400	17,958	7,600	10,358
GENERAL ELECTRIC CO	05-02-01	12-31-09	L	200	3,045	9,047	(6,002)
MEDTRONIC INC	05-02-01	12-31-09	L	400	17,758	17,071	687
NEWS CORP LTD CL A	11-12-04	12-31-09	L	600	8,265	9,843	(1,578)
SCHLUMBERGER LTD	09-04-01	12-31-09	L	100	6,559	2,289	4,271
VERIZON COMMUNICATIONS INC	03-31-08	12-31-09	L	200	6,653	7,172	(519)
CARDINAL HEALTH - CLASS ACTION			L	*****	287	******************	287
TOTAL LONG TERM GAINS/(LOSSES	3)				\$676,641	\$788,232	(\$111,591)
TOTAL GAINS/(LOSSES)					\$777,715	\$887,231	(\$109,516)
				====	=============		