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 , and ending

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
STEVENS-BENNETT HOME, INC.

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
337 MAIN STREET

City or town, state, and ZIP code
HAVERHILL MA 01830

A Employer identification number
04-2104803

B Telephone number (see page 10 of the instructions)
978-374-8861

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

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

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

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

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 4,143,670

J Accounting method ☐ 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)	107,280			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	390	390	390	
	4	Dividends and interest from securities	54,509	54,509	54,509	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10 SEE STMT	-4,595			
	b	Gross sales price for all assets on line 6a 143,496				
	7	Capital gain net income (from Part IV, line 2)		0		
	8	Net short-term capital gain			0	
	9	Income modifications				
	10a	Gross sales less returns & allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule) SEE STMT	1,071,357		1,071,357	
	12	**Total.** Add lines 1 through 11	1,228,941	54,899	1,126,256	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages	729,313		474,053	255,260
	15	Pension plans, employee benefits	137,047		89,080	47,967
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) SEE STMT	9,000		9,000	
	c	Other professional fees (attach schedule)				
	17	Interest	45,903		29,837	16,066
	18	Taxes (attach schedule) (see page 14 of the instructions) STMT	892		373	201
	19	Depreciation (attach schedule) and depletion STMT	105,790		105,790	
	20	Occupancy	54,860		35,659	19,201
	21	Travel, conferences, and meetings	405			405
	22	Printing and publications				
	23	Other expenses (att sch) SEE STMT	201,644	7,735	126,041	67,868
	24	**Total operating and administrative expenses.** Add lines 13 through 23	1,284,854	7,735	869,833	406,968
	25	Contributions, gifts, grants paid	0			0
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,284,854	7,735	869,833	406,968
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-55,913			
	b	**Net investment income** (if negative, enter -0-)		47,164		
	c	**Adjusted net income** (if negative, enter -0-)			256,423	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

DAA

P 17

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	3,760	19,266	19,266
	2	Savings and temporary cash investments	130,296	25,377	25,377
	3	Accounts receivable ▶ 26,577 Less allowance for doubtful accounts ▶	29,672	26,577	26,577
	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 (att schedule) ▶ Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	22,244	24,632	24,632
	10a	Investments—U S and state government obligations (attach schedule) STMT 7	306,047	155,531	155,531
	b	Investments—corporate stock (attach schedule) SEE STMT 8	885,255	1,077,827	1,077,827
	c	Investments—corporate bonds (attach schedule) SEE STMT 9	352,178	392,385	392,385
	11	Investments—land, buildings, and equipment basis ▶ 2,210,672 Less accumulated depreciation (attach sch) ▶ STMT 10 829,200	1,427,214	1,381,472	2,230,000
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	15	Other assets (describe ▶ SEE STATEMENT 11)	9,228	192,075	192,075
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	3,165,894	3,295,142	4,143,670
Liabilities	17	Accounts payable and accrued expenses	64,866	80,295	
	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 ▶ SEE STATEMENT 12)	801,710	741,088	
	23	**Total liabilities** (add lines 17 through 22)	866,576	821,383	
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	2,257,701	2,432,141	
	25	Temporarily restricted	117	118	
	26	Permanently restricted	41,500	41,500	
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see page 17 of the instructions)	2,299,318	2,473,759	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	3,165,894	3,295,142	

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	2,299,318
2	Enter amount from Part I, line 27a	2	-55,913
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 13	3	230,354
4	Add lines 1, 2, and 3	4	2,473,759
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	2,473,759

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	N/A			
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	
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? ☐ 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	406,442	2,200,645	0.184692
2007	365,092	2,159,435	0.169068
2006	364,239	2,170,161	0.167840
2005	332,858	2,108,656	0.157853
2004	301,362	2,226,151	0.135374

2 **Total** of line 1, column (d)	2	0.814827
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.162965
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,530,206
5 Multiply line 4 by line 3	5	249,370
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	472
7 Add lines 5 and 6	7	249,842
8 Enter qualifying distributions from Part XII, line 4	8	406,968

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 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	472
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	0
3	Add lines 1 and 2			3	472
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	472
6	Credits/Payments				
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	540		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c			
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	540
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	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	68
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 68 **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? N/A	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) ▶ MA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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 ▶ CORPORATION Telephone no ▶ 978-374-8861

337 MAIN STREET

Located at ▶ HAVERHILL, MA ZIP+4 ▶ 01830

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)?	N/A	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?	N/A	1c		
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 ▶ 20 , 20 , 20 , 20				
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)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20 , 20 , 20 , 20				
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)	N/A	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)

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)? N/A **5b**

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

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? N/A **7b**

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

1 List all officers, directors, trustees, foundation managers and their compensation (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
SEE LIST ATTCHED	1 00	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 ▶

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 OPERATION OF HOME FOR THE AGED - BEDS FOR 30 LADIES	930,361
2 ACQUISITION OF ASSETS FOR THE HOME	60,048
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 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 N/A	
2	
All other program-related investments See page 24 of the instructions 3	
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	1,498,395
b	Average of monthly cash balances			1b	55,114
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	1,553,509
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0		
2	Acquisition indebtedness applicable to line 1 assets			2	0
3	Subtract line 2 from line 1d			3	1,553,509
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)			4	23,303
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4			5	1,530,206
6	**Minimum investment return.** Enter 5% of line 5			6	76,510

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	
2a	Tax on investment income for 2009 from Part VI, line 5	2a			
b	Income tax for 2009 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	
3	Distributable amount before adjustments Subtract line 2c from line 1			3	
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	
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	

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	406,968
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	406,968
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	472
6	***Adjusted qualifying distributions.*** *Subtract line 5 from line 4*	6	406,496

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				
2	Undistributed income, if any, as of the end of 2009				
a	Enter amount for 2008 only				
b	Total for prior years 20 _____ , 20 _____ , 20 _____				
3	Excess distributions carryover, if any, to 2009				
a	From 2004				
b	From 2005				
c	From 2006				
d	From 2007				
e	From 2008				
f	**Total** of lines 3a through e				
4	Qualifying distributions for 2009 from Part XII, line 4 ▶ $ __________				
a	Applied to 2008, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d	Applied to 2009 distributable amount				
e	Remaining amount distributed out of corpus				
5	Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
6	**Enter the net total of each column as indicated below:**				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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				
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				
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				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶ N/A

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			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed N/A					
b 85% of line 2a N/A					
c Qualifying distributions from Part XII, line 4 for each year listed	406,968	406,982	365,790	364,239	1,543,979
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	406,968	406,982	365,790	364,239	1,543,979
3 Complete 3a, b, or c for the alternative test relied upon a "Assets" alternative test—enter (1) Value of all assets N/A					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i) N/A					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed	51,007	73,355	71,981	72,339	268,682
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) N/A					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) N/A					
(3) Largest amount of support from an exempt organization N/A					
(4) Gross investment income N/A					

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))

N/A

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

N/A

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

N/A

c Any submission deadlines

N/A

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

N/A

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient 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 N/A				
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

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 PROGRAM SERVICE REVENUE					1,071,357
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	390	
4 Dividends and interest from securities			14	54,509	
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					-4,595
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		54,899	1,066,762

13 **Total.** Add line 12, columns (b), (d), and (e) 13 1,121,661

(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)
93A	THE HOME'S EXEMPT PURPOSE IS TO PROVIDE A RESIDENCE FOR
	ELDERLY WOMEN. THIS PROGRAM COMPRISES THE ACTIVITIES
	WHICH PROVIDE THE ELDERLY WOMEN A RESIDENCE.

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			

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

b If "Yes," complete the following schedule

(a) Name of organization	**(b)** Type of organization	**(c)** Description of relationship
N/A		

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

▶ President 3-31-10 ▶ President

Signature of officer or trustee Date Title

Paid Preparer's Use Only

Preparer's signature ▶	Date 02/16/10	Check if self-employed ▶ ☐	Preparer's identifying number (see **Signature** on page 30 of the instructions) P00085340
Firm's name (or yours if self-employed), address, and ZIP code ▶	ROLAND P. LAMBALOT PC 184 PLEASANT VALLEY ST # 205 METHUEN, MA 01844-5855		EIN ▶ 04-3233496 Phone no 978-691-0050

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF.**

OMB No 1545-0047

2009

Name of the organization

STEVENS-BENNETT HOME, INC.

Employer identification number

04-2104803

Organization type *(check one)*

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc , purposes, but these contributions did not aggregate to more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of $5,000 or more during the year ▶ $

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box in the heading of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF

Name of organization	Employer identification number
STEVENS-BENNETT HOME, INC.	04-2104803

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	GRIFFIN-WHITE FOUNDATION	$ 17,745	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
2	WARREN ELLIS TRUST	$ 74,658	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
3	SUSIE WHITE TRSUT	$ 5,121	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
4	HERBERT CHASE TRUST	$ 7,960	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Description			How Received					
Whom Sold	Date Acquired	Date Sold		Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
FHLMC	11/17/99	9/15/09	PURCHASE	$ 50,000	$ 52,062	$	$	$ -2,062
US TREASURY	7/29/96	3/20/09	PURCHASE	70,529	72,539			-2,010
AMER INTL GROUP	6/18/96	6/30/09	PURCHASE	14	150			-136
CITADEL BROADCASTING	1/03/01	10/20/09	PURCHASE	8	12			-4
FAIRPOINT COMMUNICATION	6/18/96	10/20/09	PURCHASE	3	30			-27
FNMA	12/14/96	1/14/09	PURCHASE	205	228			-23
MOTOROLA	6/27/00	1/14/09	PURCHASE	1,589	1,772			-183
WELLS FARGO	3/08/99	1/02/09	PURCHASE	19	172			-153
WEYERHAUSER	3/05/98	10/20/09	PURCHASE	7,929	6,122			1,807
WYETH	10/17/96	10/16/09	PURCHASE	13,200	15,004			-1,804
TOTAL				$ 143,496	$ 148,091	$ 0	$ 0	$ -4,595

Statement 2 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
PROGRAM SERVICE REVENUE	$ 1,071,357	$	$ 1,071,357
TOTAL	$ 1,071,357	$ 0	$ 1,071,357

Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ANNUAL STATEMENTS, TAX PREPARATI	$ 9,000	$	$ 9,000	$
TOTAL	$ 9,000	$ 0	$ 9,000	$ 0

Statement 4 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
LICENSES	$ 892	$	$ 373	$ 201
TOTAL	$ 892	$ 0	$ 373	$ 201

Statement 5 - Form 990-PF, Part I, Line 19 - Depreciation

Description							
Date Acquired	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
DEPRECIATION							
	$	$			$ 105,790	$	$
TOTAL	$ 0	$ 0			$ 105,790	$ 0	$ 0

Statement 6 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
	$	$	$	$
EXPENSES				
FOOD	72,614		47,199	25,415
SUPPLIES	56,408		36,665	19,743
SERVICE CONTRACTS	8,440		5,486	2,954
INSURANCE	33,473		21,757	11,716
ADVERTISING & PROMOTION	2,409		1,566	843
TELEPHONE	4,241		2,757	1,484
DUES & SUSCRIPTIONS	2,524		1,641	883
PAYROLL SERVICE	6,162		4,005	2,157
MISCELLANEOUS	1,410		917	493
INVESTMENT EXPENSES	7,735	7,735		
CONTRACTED SERVICES	6,228		4,048	2,180
TOTAL	$ 201,644	$ 7,735	$ 126,041	$ 67,868

Statement 7 - Form 990-PF, Part II, Line 10a - US and State Government Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
GOVERNMENT BONDS	$ 306,047	$ 155,531	MARKET	$ 155,531
TOTAL	$ 306,047	$ 155,531		$ 155,531

Statement 8 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CORPORATE STOCK	$ 885,255	$ 1,077,827	MARKET	$ 1,077,827
TOTAL	$ 885,255	$ 1,077,827		$ 1,077,827

Statement 9 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CORPORATE BONDS	$ 352,178	$ 392,385	MARKET	$ 392,385
TOTAL	$ 352,178	$ 392,385		$ 392,385

Statement 10 - Form 990-PF, Part II, Line 11 - Land, Building, and Equipment Investments

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
LAND	$ 36,860	$ 36,860	$	$ 200,000
BUILDINGS AND IMPROVEMENTS	1,312,259	1,947,967	674,252	2,000,000
EQUIPMENT	25,230	105,822	79,757	10,000
FURNITURE & FIXTURES	52,865	120,023	75,191	20,000
CONSTRUCTION IN PROGRESS				
TOTAL	$ 1,427,214	$ 2,210,672	$ 829,200	$ 2,230,000

Statement 11 - Form 990-PF, Part II, Line 15 - Other Assets

Description	Beginning of Year	End of Year	Fair Market Value
INVESTMENT INCOME RECEIVABLE	$ 9,228	$ 6,641	$ 6,641
ADVANCE TO TRUST		185,434	185,434
TOTAL	$ 9,228	$ 192,075	$ 192,075

Statement 12 - Form 990-PF, Part II, Line 22 - Other Liabilities

Description	Beginning of Year	End of Year
NOTES PAYABLE	$ 801,710	$ 741,088
TOTAL	$ 801,710	$ 741,088

Statement 13 - Form 990-PF, Part III, Line 3 - Other Increases

Description	Amount
UNREALIZED APPRECIATION OF SECURITIES	$ 230,354
TOTAL	$ 230,354

STEVENS-BENNETT HOME, INC.
BOARD OF DIRECTORS

Tricia Horgan-President
c/o Merrimac Valley Hospital
140 Lincoln Avenue
Haverhill, MA 01830

Frank Novak 1st. V.P.
203 Lawrence St.
Haverhill, MA 01830

Myrna Nogast
21 Minot Ave.
Haverhill, MA 01830

William J. Barron, Esq.
39 Westland Terrace
Haverhill, MA 01830

Sheila Callahan
27 15th Avenue
Haverhill, MA 01830

Mary Ellen Daly-O'Brien
66 Webster Street
Haverhill, MA 01830

Robert Driscoll
55 North Broadway
Haverhill, MA 01832

Sandra Fudge
9 Dartmouth St.
Groveland, MA 01834

Thomas Thornton 2nd V.P.
c/o Thornton Investment Services, Inc.
191 Merrimack St. Suite 206
Haverhill, MA 01830

Victoria Bradley – Treasurer
1239 Boston Road
Ward Hill, MA 01835

Joan Pechnik – Corresponding Secretary
77 Old Ferry Road
Haverhill, MA 01830

Nancy Galinsky
60 Sarah J. Circle
Haverhill, MA 01832

Harriet Hopkins
1 Nichols Way, Apt. 1111
Groveland, MA 01834

Marie Lawson
53 Coral Street
Haverhill, MA 01830

Mary Watson
522 Amesbury Road
Haverhill, MA 01830

George Fahey
4 Waterside Lane
W. Newbury, MA 01985

Stevens-Bennett Home, Inc
Attachment to Form 99-PF
December 31, 2009 04-2104803

	Cost	Unrealized Gain/Loss	Fair Market Value
Aetna US Healthcare	17,358	20,682	38,040
Air Products	15,187	9,131	24,318
Alcon Inc	11,530	37,775	49,305
American Intl	3,760	(3,220)	540
A T & T	11,865	1,730	13,595
Automatic Data Proc	11,109	1,737	12,846
BP Amoco	9,478	21,130	30,608
Boeing Company	7,159	9,080	16,239
Bristol-Myers	14,868	(7,293)	7,575
Broadridge Financial	1,189	503	1,692
CB Richard Ellis	10,338	(4,910)	5,428
Caterpillar Inc	8,118	14,678	22,796
Chevron/Texaco	25,859	20,335	46,194
Citigroup	20,463	(18,507)	1,956
Clorox Co	25,253	5,247	30,500
Corporate Executive	13,649	(9,085)	4,564
Covidien LTD	4,647	1,339	5,986
Dell Inc	8,689	(4,381)	4,308
Diamond Offshore	10,281	(439)	9,842
Disney, Walt	22,456	9,794	32,250
Dow Chemical	18,781	(4,966)	13,815
EMC Corp	10,566	(1,831)	8,735
Expeditors Intl	7,729	6,163	13,892
Exxon Mobil	8,571	27,433	36,004
Fedex Corp	16,022	9,013	25,035
Ford Motor	9,227	(4,112)	5,115
Gap Inc	11,507	(1,032)	10,475
Gazprom	10,317	(5,437)	4,880
General Electric	18,291	682	18,973
Halliburton Co	4,507	4,520	9,027
Hewlett-Packard	6,753	13,851	20,604
Highwoods Properties	9,103	4,237	13,340
Home Depot	5,110	12,248	17,358
Honeywell Intl	8,863	2,897	11,760
Intel Corp	18,512	(8,312)	10,200
International Bus Mach	20,667	5,513	26,180
International Paper	10,372	(2,338)	8,034
Johnson & Johnson	18,514	20,132	38,646
Kraft Foods	15,500	(1,910)	13,590
Lilly Eli & Co	12,874	(5,732)	7,142
Market Vectors ETF gold	9,937	(695)	9,242
Medco Health	3,251	9,531	12,782
Merck & Co Inc	8,679	(1,371)	7,308
Microsoft Corp	3,159	15,135	18,294
Northrop Grumman	13,179	3,576	16,755
Nstar	10,100	4,620	14,720
Pfizer	15,002	16,267	31,269
PPG Industries	14,476	3,086	17,562
Praxair Inc	15,400	24,755	40,155
Procter & Gamble	31,238	22,844	54,082
Raytheon Co	11,000	9,608	20,608
Reliance Steel	6,250	15,360	21,610
Schlumberger LTD	12,543	13,493	26,036
Target Corp	11,077	13,108	24,185
Teco Energy	15,225	(5,493)	9,732
Teva Pharmaceutical	10,952	11,520	22,472
3m Company	6,448	10,086	16,534
Tyco Electronics	4,278	(1,209)	3,069
Tyco Intl	5,711	(1,251)	4,460
United Technologies	12,980	902	13,882
Verizon Comm	10,492	5,675	16,167
Wells Fargo	19,141	(17,009)	2,132
Xerox Corporation	9,224	(5,840)	3,384
	754,784	323,043	1,077,827

Stevens-Bennett Home, inc.
Attachment to Form 990-PF
December 31, 2009 04-2104803

Part II Line 10 - Investments

	Cost	Unrealized Gain/Loss	Fair Market Value
U S Treasury Notes	50,765	14,009	64,774
U S Treasury Bonds	25,375	6,356	31,731
U S Treasury Bonds	25,707	3,539	29,246
U S Treasury Bonds	24,512	5,269	29,781
FHLMC Deb	49,976	2,308	52,284
Total U S Obligations	176,335	31,481	207,816
General Electric	24,505	1,495	26,000
IBM Corp	25,000	1,458	26,458
Credit Suisse	100,005	24,875	124,880
Merrill Lynch	24,255	1,445	25,700
Parker Hannifin Corp	50,105	3,540	53,645
Bellsouth Telecom	47,137	5,850	52,987
IBM Corp	25,408	3,161	28,569
BP Cap Markets	25,080	2,151	27,231
Amgen Inc	23,855	3,060	26,915
Total Corporate Bonds	345,350	47,035	392,385