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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

OMB No 1545-0052

2009Department of the Treasury
Internal Revenue Service

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

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 ROSENBERG FAMILY CHARITABLE FOUNDATION		A Employer identification number 04-2947174
	C/O RICHARD SNIDER		B Telephone number (617) 527-3023
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
	51 WINCHESTER STREET		
City or town, state, and ZIP code NEWTON, MA 02461			
H Check type of organization. <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 631,541. (Part I, column (d) must be on cash basis)		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	34,052.	34,016.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<58,134.>			
	b Gross sales price for all assets on line 6a	189,015.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income	<842.>	<842.>		STATEMENT 2	
12 Total Add lines 1 through 11	<24,924.>	33,174.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	17,503.	13,906.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 3	375.	0.		0.
	b Accounting fees STMT 4	2,283.	2,283.		0.
	c Other professional fees				
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 5	112.	77.		0.
	24 Total operating and administrative expenses Add lines 13 through 23	20,273.	16,266.		0.
	25 Contributions, gifts, grants paid	33,435.			33,435.
26 Total expenses and disbursements. Add lines 24 and 25	53,708.	16,266.		33,435.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<78,632.>				
b Net investment income (if negative, enter -0-)		16,908.			
c Adjusted net income (if negative, enter -0-)			N/A		

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	31,852.	5,699.	5,699.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 6	167,331.	183,490.	193,962.
	c Investments - corporate bonds STMT 7	487,144.	418,506.	431,880.
11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	686,327.	607,695.	631,541.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	880,738.	880,738.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	<194,411.>	<273,043.>	
	30 Total net assets or fund balances	686,327.	607,695.	
31 Total liabilities and net assets/fund balances	686,327.	607,695.		

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	686,327.
2 Enter amount from Part I, line 27a	2	<78,632.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	607,695.
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	607,695.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b SEE ATTACHED STATEMENTS				
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 189,015.		247,149.	<58,134.>

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			<58,134.>

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	<58,134.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☒ Yes ☐ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008			
2007			
2006			
2005			
2004			

- 2 Total of line 1, column (d)
- 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
- 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5
- 5 Multiply line 4 by line 3
- 6 Enter 1% of net investment income (1% of Part I, line 27b)
- 7 Add lines 5 and 6
- 8 Enter qualifying distributions from Part XII, line 4
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.
See the Part VI instructions.

2	
3	
4	
5	
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7	
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Part VI Exempt Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b		1	338.
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	338.
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	338.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	468.	
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	468.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	130.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> 130. Refunded <input type="checkbox"/> 0.	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
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		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► RICHARD M. SNIDER Located at ► 51 WINCHESTER STREET, NEWTON, MA	Telephone no. ► 617-527-3023 ZIP+4 ► 02461		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	► 15 N/A		

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here		X
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?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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

5a During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

6b

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.

(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
RICHARD M. SNIDER 51 WINCHESTER STREET NEWTON, MA 02461	TRUSTEE 2.00	17,503.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
N/A	0.00	0.	0.	0.

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

▶ 0

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Part VIII

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
N/A		0.
Total number of others receiving over \$50,000 for professional services		0

Part IX-A

Summary of Direct Charitable Activities

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

	Expenses
1 NONE. ALL OF THE FOUNDATION'S ACTIVITIES WERE INDIRECT (NOT DIRECT) CHARITABLE ACTIVITIES ACCORDING TO REGULATION SECTION 53.4942 (B)-(1)(B)(1).	0.
2	
3	
4	

Part IX-B

Summary of Program-Related Investments

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

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	552,733.
b	Average of monthly cash balances	1b	46,553.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	599,286.
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	599,286.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	8,989.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	590,297.
6	Minimum investment return. Enter 5% of line 5	6	29,515.

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

1	Minimum investment return from Part X, line 6	1	29,515.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	338.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	338.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	29,177.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	29,177.
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	29,177.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	33,435.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	33,435.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	33,435.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				29,177.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			31,850.	
b Total for prior years:		0.		
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	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 33,435.				
a Applied to 2008, but not more than line 2a			31,850.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				1,585.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 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				27,592.
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 990-PF (2009)

C/O RICHARD SNIDER

04-2947174

Page 10

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income

[illegible]

N/A

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
				34,052.
				<842.>
				<58,134.>
	0.		0.	<24,924.>
				<24,924.>

[illegible]

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	300 GENESIS LEASING	P	04/02/08	03/24/09
b	100 GENESIS LEASING	P	04/02/08	03/24/09
c	400 MACQUARIE/FIRST TRUST GLOBAL	P	05/19/08	03/24/09
d	15.533 VANGUARD TOTAL MARKET	P	12/31/08	03/24/09
e	100 GENESIS LEASING	P	04/02/08	03/24/09
f	EPD NOV PUTS	P	10/12/09	11/22/09
g	500 TEXACO CAPITAL 5.5% 1/15/09	P	02/03/00	01/15/09
h	100 GENESIS LEASING	P	02/26/08	03/24/09
i	300 GENESIS LEASING	P	02/26/08	03/24/09
j	200 GENESIS LEASING	P	03/12/08	03/24/09
k	200 GENESIS LEASING	P	03/12/08	03/24/09
l	125 FRANKLIN RESOURCES	P	02/16/07	03/24/09
m	225.776 VANGUARD TOTAL MARKET INDEX	P	10/12/07	03/24/09
n	271.588 VANGUARD TOTAL MARKET INDEX	P	10/30/07	03/24/09
o	13.073 VANGUARD TOTAL MARKET INDEX	P	01/25/08	03/24/09

(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 1,007.		4,535.	<3,528.>
b 336.		1,510.	<1,174.>
c 3,158.		9,927.	<6,769.>
d 148.		328.	<180.>
e 337.		1,510.	<1,173.>
f		87.	<87.>
g 50,000.		44,472.	5,528.
h 336.		1,949.	<1,613.>
i 1,007.		5,823.	<4,816.>
j 671.		3,512.	<2,841.>
k 671.		3,512.	<2,841.>
l 6,570.		15,745.	<9,175.>
m 2,148.		4,771.	<2,623.>
n 2,583.		5,739.	<3,156.>
o 124.		276.	<152.>

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<3,528.>
b			<1,174.>
c			<6,769.>
d			<180.>
e			<1,173.>
f			<87.>
g			5,528.
h			<1,613.>
i			<4,816.>
j			<2,841.>
k			<2,841.>
l			<9,175.>
m			<2,623.>
n			<3,156.>
o			<152.>

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).
If (loss), enter "-0-" in Part I, line 8 }

3

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	300 ISHARES RUSSELL MIDCAP	P	05/23/07	03/26/09
b	HSBC 6% 2020	P	03/05/07	07/16/09
c	25 PRINCIPAL LIFE 6.15% 2027	P	04/21/08	07/17/09
d	245 CORNING	P	10/02/07	08/27/09
e	400 ORACLE	P	05/18/07	08/28/09
f	225 ADOBE SYSTEMS	P	04/17/07	09/01/09
g	200 ADOBE SYSTEMS	P	04/26/07	09/01/09
h	200 FORD MOTOR 7.375%	P	12/31/99	10/28/09
i	NFS - CAPITAL GAIN DISTRIBUTION	P	VARIOUS	VARIOUS
j				
k				
l				
m				
n				
o				

(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 7,048.		16,294.	<9,246.>
b 44,220.		50,150.	<5,930.>
c 22,584.		24,862.	<2,278.>
d 3,836.		6,231.	<2,395.>
e 8,949.		7,644.	1,305.
f 7,009.		9,618.	<2,609.>
g 6,230.		8,554.	<2,324.>
h 20,000.		20,100.	<100.>
i 43.			43.
j			
k			
l			
m			
n			
o			

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<9,246.>
b			<5,930.>
c			<2,278.>
d			<2,395.>
e			1,305.
f			<2,609.>
g			<2,324.>
h			<100.>
i			43.
j			
k			
l			
m			
n			
o			

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	<58,134.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES		STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT	
ENERGY TRANSFER PARTNERS - DIVIDENDS	2.	0.	2.	
ENTERPRISE-DIVIDENDS	1.	0.	1.	
ENTERPRISE-INTEREST	14.	0.	14.	
ETRADE - DIVIDENDS	1,734.	0.	1,734.	
ETRADE - INTEREST INCOME	17,308.	0.	17,308.	
ETRADE - NONTAXABLE DIVIDENDS	36.	0.	36.	
NATIONAL FINANCIAL SERVICES - DIVIDENDS	1,382.	0.	1,382.	
NFS-BOND INTEREST	13,575.	0.	13,575.	
TOTAL TO FM 990-PF, PART I, LN 4	34,052.	0.	34,052.	

FORM 990-PF	OTHER INCOME		STATEMENT	2
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
ENTERPRISE PRODUCTS PARTNERS	<730.>	<730.>		
ENTERPRISE PRODUCTS				
PARTNERS-NONDEDUCTIBLE EXPENSE	<2.>	<2.>		
ENTERPRISE - SECTION 1231 LOSS	<43.>	<43.>		
MISCELLANEOUS INCOME	611.	611.		
ENERGY TRANSFER PARTNERS	<680.>	<680.>		
ENERGY TRANSFER PARTNERS - OTHER INCOME	4.	4.		
ENERGY TRANSFER PARTNERS - NONDEDUCTIBLE EXP	<2.>	<2.>		
TOTAL TO FORM 990-PF, PART I, LINE 11	<842.>	<842.>		

FORM 990-PF	LEGAL FEES			STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LEGAL FEES	375.	0.		0.	
TO FM 990-PF, PG 1, LN 16A	375.	0.		0.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING FEES	2,283.	2,283.		0.	
TO FORM 990-PF, PG 1, LN 16B	2,283.	2,283.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BANK CHARGES	71.	71.		0.	
FOREIGN TAX CREDIT	6.	6.		0.	
MASS FILING FEE	35.	0.		0.	
TO FORM 990-PF, PG 1, LN 23	112.	77.		0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	6
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
PIMCO OPPORTUNITY FUND 400	6,667.	5,760.		
ENTERPRISE PRODUCTS PARTNERS	6,813.	15,705.		
ORACLE CORP 450	8,566.	11,038.		
ADOBE SYSTEMS 425	0.	0.		
CORNING 245	0.	0.		
FRANKLIN RESOURCES 125	0.	0.		

ISHARES MIDCAP	0.	0.
ISHARES SINGAPORE	35,963.	31,885.
VANGUARD TOTAL MARKET INDEX	0.	0.
ORACLE CORP 400	0.	0.
GENESIS LEASING	0.	0.
MACQUARIE/FIRST GLOBAL TR	0.	0.
AT&T	10,863.	11,212.
ALTRIA	8,552.	9,815.
BAXTER LABS	7,399.	7,335.
BRISTON MYERS	7,876.	8,838.
DREYFUS INT'L BOND CLASS I	11,815.	11,715.
ELI LILLY	5,498.	7,142.
ENERGY TRANSFER PARTNERS	11,939.	12,367.
ENERGY TRANSFER EQUITY LP	10,534.	12,232.
ISHARES HONG KONG	6,000.	6,264.
PHILIP MORRIS	10,014.	9,638.
TEMPLETON GLOBAL BOND CLASS C	25,168.	25,788.
PHILIP MORRIS 150	9,823.	7,228.
TOTAL TO FORM 990-PF, PART II, LINE 10B	183,490.	193,962.

FORM 990-PF	CORPORATE BONDS	STATEMENT	7
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
JP MORGAN 6.625%	48,000.	52,208.
FORD MOTOR CREDIT NOTES 7.375%	0.	0.
500 TEXACO CAPITAL 5.5%	0.	0.
AETNA 6.75% DUE 9/15/2013	53,979.	52,932.
BELLSOUTH 7% 2025	44,912.	42,390.
MORGAN STANLEY 4/1/14	92,791.	100,575.
HSBC 6% 2020	50,150.	47,320.
AMERICAN EXPRESS 7% 2018	41,692.	44,051.
GE 5.625% 9/15/17	16,036.	19,574.
PRINCIPAL LIFE 6.15% 2027	0.	0.
GE 5.625% 2018	19,640.	20,495.
GE CAPITAL 6.15% 2026	19,870.	19,785.
JP MORGAN 5.375% 2014	20,256.	21,411.
PROCTOR & GAMBLE 6.45% 2026	11,180.	11,139.
TOTAL TO FORM 990-PF, PART II, LINE 10C	418,506.	431,880.

ROSENBERG FAMILY CHARITABLE FOUNDATION
CHARITABLE DONATIONS - 2009
EIN 04-2947174

Contributions for 2009	<u>Date</u>	<u>Check #</u>	<u>Amount</u>
Agape International	12/11/2009	1136	100.00
Alzheimers Unit Hogers Hospital	3/13/2009	838	50.00
Alzheimers Unit Hogers Hospital	9/30/2009	1073	100.00
American Cancer Society	4/7/2009	882	100.00
American Diabetes Association	12/11/2009	1133	100.00
American Friends of Magen David Adam	1/9/2009	876	100.00
American Heart Association	12/11/2009	1115	150.00
American Lung Association	6/29/2009	1065	25.00
American Red Cross/Mass Bay chapter	12/11/2009	1131	100.00
Animal Rescue League Boston	4/7/2009	881	25.00
Asbergers Association of N. E.	7/13/2009	898	100.00
Bay State Exec Ass'n., for Brown Scholar. Fd.	1/14/2009	874	25.00
Bay State Exec Ass'n., for Brown Scholar. Fd.	12/16/2009	916	25.00
Bay State Exec Ass'n., for Brown Scholar. Fd.	12/16/2009	1137	400.00
BCEFA (Broadway Cares)	6/11/2009	896	350.00
Belmont Hill School	12/15/2009	939	200.00
Best Friends Animal Society	12/11/2009	1123	150.00
Beverly School for the Deaf	12/11/2009	1111	100.00
Birthright	12/15/2009	941	250.00
B'nai Jacob	12/15/2009	942	25.00
Boston Chapter Of Hadassah	5/12/2009	889	100.00
Boston Chapter Of Hadassah	11/22/2009	914	50.00
Boston Rescue Mission	12/11/2009	1118	150.00
Brooklyn Law School	12/15/2009	919	5000.00
Buddy Dog Humane Society	12/11/2009	1114	75.00
Camp Jahberwocky	8/11/2009	1070	150.00
Camp Sunshine Sebago Lake Inc.	7/20/2009	899	100.00
Carroll Center for the Blind	12/11/2009	1120	150.00
Childrens Hospital	10/6/2009	1078	800.00
Childrens Hospital	11/21/2009	932	100.00
CitiBusiness card, for WBUR Radio	2/18/2009	877	200.00
City Year	6/29/2009	1064	300.00
Combined Jewish Philanthropies	3/13/2009	839	425.00
Committee to elect Claire Sokoloff	10/6/2009	1075	100.00
Committee to elect Matt Hills	6/29/2009	1059	100.00
Committee to elect Susan Rosenbaum	10/6/2009	1077	50.00
Coolidge Theatre Foundation	5/1/2009	1052	100.00
Dana Farber Cancer Institute	2/23/2009	836	200.00
Dean College	5/1/2009	1054	150.00
Dearborn Academy	10/26/2009	909	750.00
Dearborn Academy	10/26/2009	910	2500.00

ROSENBERG FAMILY CHARITABLE FOUNDATION

CHARITABLE DONATIONS - 2009

EIN 04-2947174

Dearborn Academy	10/26/2009	912	900.00
Dearborn Academy	12/15/2009	920	1000.00
Dearborn Academy	12/15/2009	936	250.00
Emerson College Fund	12/24/2009	921	65.00
Foundation Orthopedic & Complex Spine	10/26/2009	911	250.00
Guide Dog Foundation	12/11/2009	1126	100.00
Habitat for Humanity	12/11/2009	1128	100.00
Hadassah Membership	12/4/2009	915	250.00
Hartsdale Cemetery	12/24/2009	1259	175.00
Harvard College Fund	6/29/2009	1066	300.00
Home for Little Wanderers	12/11/2009	1119	100.00
Home for Little Wanderers	12/15/2009	943	200.00
Hospice of the Good Shephard	12/11/2009	1129	100.00
Jeff Idzal Memorial Fund	5/7/2009	888	100.00
Jeff Snider for National M. S. Society	12/2/2009	933	50.00
Jeovanni Lopez Mem. School Fund	5/1/2009	886	25.00
Jimmy Fund	9/13/2009	1072	300.00
Just Cause	6/18/2009	1056	250.00
kenneth Schwartz Center	11/19/2009	931	700.00
MAFCU (for MA. Coalition for Homeless)	10/1/2009	908	100.00
Make A Wish Foundation	12/15/2009	937	500.00
Michael J Fox Foundation Parkinsons	12/11/2009	1122	200.00
Mt Auburn Hospital	12/15/2009	934	1000.00
Museum of Fine Arts	11/11/2009	913	170.00
N E Baptist Hospital	12/11/2009	1134	200.00
National Center for Learning Disabilities	12/24/2009	922	65.00
National Multiple Schlerosis Society	12/25/2009	923	100.00
Newton Firefighters	9/10/2009	905	100.00
Newton Historial Society	5/23/2009	890	90.00
Newton North High School	10/8/2009	1079	75.00
Newton Police Memorial	3/31/2009	880	100.00
NNHS Barbara Laurie Mem. Scholarship	12/11/2009	1135	2000.00
North Shore Medical Center	6/9/2009	895	250.00
Northeast Animal Shelter	12/11/2009	1113	150.00
NPH Honduras	6/29/2009	1067	100.00
Optometric Center State University	12/24/2009	1258	100.00
Oregon Food Bank	12/11/2009	1132	500.00
Pan Mass Challenge	6/5/2009	893	200.00
Pan Mass Challenge	6/5/2009	894	200.00
Pan Mass Challenge	6/18/2009	1057	200.00
Pan Mass Challenge	6/24/2009	1069	100.00
Pan Mass Challenge	7/16/2009	1068	500.00
Pan Mass Challenge	7/20/2009	900	250.00

ROSENBERG FAMILY CHARITABLE FOUNDATION

CHARITABLE DONATIONS - 2009

EIN 04-2947174

Pan Mass Challenge	7/20/2009	902	250.00
Pan Mass Challenge	7/21/2009	903	300.00
Pan Mass Challenge	8/4/2009	904	100.00
Paralyzed Veterans of America	12/11/2009	1116	150.00
Pine Street Inn	12/11/2009	1124	150.00
Project Bread	12/11/2009	1125	100.00
Project Keshet	12/24/2009	1256	265.00
reach beyond domestic violence	12/15/2009	938	50.00
Rodman Ride for Kids	8/14/2009	907	100.00
Rosies Place	12/11/2009	1117	150.00
Roxbury Latin	6/29/2009	1063	250.00
Roxbury Prep School	6/29/2009	1062	200.00
Roxbury Prep School	12/24/2009	1257	100.00
Ruth Rales Jewish Family Services	3/13/2009	837	100.00
Salvation Army	12/11/2009	1121	150.00
Shriners Hospital	12/11/2009	1130	100.00
Squash Busters	4/10/2009	884	25.00
Susan G. Komen for the Love	3/31/2009	840	200.00
Temple Israel of Boston	4/10/2009	883	25.00
Temple Shalom Newton	8/26/2009	1071	50.00
Temple Shalom Newton	10/6/2009	1074	100.00
Temple Shalom Newton	12/15/2009	935	900.00
Touro Synagogue	12/11/2009	1112	50.00
Trustees of Reservations	6/1/2009	891	100.00
Trustees of Reservations	6/24/2009	1058	100.00
University Michigan Hillel	5/1/2009	1055	180.00
University of Vermont	6/1/2009	892	100.00
University of Vermont	12/18/2009	1138	400.00
Wellness Community	12/11/2009	1127	100.00
WGBH	12/15/2009	940	50.00
Winsor School	6/29/2009	1061	500.00
Worcester County Food Bank	3/16/2009	879	100.00
Young Peoples Chorus of N.Y.C.	12/15/2009	917	500.00
Zach Carson Brain Tumor Fund	6/29/2009	1060	200.00
Zakim Center at Dana Farber	4/1/2009	1051	500.00
Zakim Center at Dana Farber	4/13/2009	885	250.00

TOTAL CONTRIBUTIONS

33,435.00

Holder of a CV7-Day All-Alc. Bev. License has petitioned to amend the description of the licensed business -

From: Two rooms, kitchen and storage area on the first floor and mezzanine.

To: Two rooms, kitchen and storage area on the first floor and mezzanine. And to include an outdoor seasonal patio on private property for 12 patrons between the hours of 11:00 a.m. - 11:00 p.m.

HEARING: WEDNESDAY, MAY 19, 2010
10:00 A.M. WILLIAM F. ARRIGAL, JR. LIBRARY
ROOM 809A - CITY HALL - BOSTON

For the Board,
By it's Secretary
JEAN M. LORIZIO

May 7

LEGAL NOTICES

THE ROSENBERG FAMILY CHARITABLE FOUNDATION

Notice is hereby given that the annual report, Form 990PF, at the above Foundation for the year 2009 is available for inspection at the principal office of the Foundation, 51 Winchester Street, Newton, MA 02461, (617) 527-3023, during business hours by any citizen who so requests within 180 days of the date of the publication of this notice. Name of principal manager: Richard M. Snider

May 7

LEGAL NOTICES

A certain parcel of land situated in Boston, known as "Rogby" being L. Latham, Surveyor, dated April 189 Deeds. at end of Book 2191, and bound

NORTHWESTERLY by Lot 422 on said
NOTHEASTERLY by Randolph Road, 47
SOUTHEASTERLY by Lot 392 on said P
SOUTHWESTERLY by Lot 420 on said

Containing 4966.01 square feet, be a more or less. Said premises are conveyed set forth in the title deeds.

T/R 38804/133

The premises are to be sold subject to easements, restrictions, building and titles, water bills, municipal liens and parties in possession.

TERMS OF SALE:

A deposit of TEN THOUSAND DOLLARS (\$10,000.00) shall be required to be paid by certified or bank's cashier check. The balance of the purchase price is to be paid by check or by bank's cashier check in full on the date of the sale. TIME WILL BE OF THE ESSENCE.

Other terms if any, to be announced

Provident Funding Associates, L.P.
Present Holder of said Mortgage,
By Its Attorneys,
Barron & Stadfeld, P.C.
100 Cambridge Street, Suite 1310
Boston, MA 02114
617-723-9800