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Form 990-PF

Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

OMB No 1545-0052

Department 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 Name of foundation A Employer identification number Use the IRS THE LOUISE C. AND ALVIN SLOTNICK 04-3540207 label. FAMILY CHARITABLE FOUNDATION Telephone number (see page 10 of the instructions) Otherwise. print 508-926-2400 Number and street (or P O box number if mail is not delivered to street address) Room/suite or type. 47 OAKVALE ROAD If exemption application is pending, check here See Specific City or town, state, and ZIP code 1. Foreign organizations, check here Instructions. MA 02468 NEWTON 2. Foreign organizations meeting the Check type of organization: X Section 501(c)(3) exempt private foundation 85% test, check here and attach computation I Section 4947(a)(1) nonexempt charitable trust | Other taxable private foundation If private foundation status was terminated under J Accounting method: X Cash Accrual section 507(b)(1)(A), check here Fair market value of all assets at end of year (from Part II, col. (c), Other (specify) If the foundation is in a 60-month termination under section 507(b)(1)(B), check here 537,316 (Part I, column (d) must be on cash basis.) line 16) ▶ \$ ▶ Part I → Analysis of Revenue and Expenses me (d) Disbursements (a) Revenue and (b) Net investment (c) Adjusted net expenses per for chantable total of amounts in columns (b), (c), and (d) may not necessarily equal purposes books income income the amounts in column (a) (see page 11 of the instructions)) (cash basis only) Contributions, gifts, grants, etc., received (attach schedule) Check ► X If the foundation is **not** required to attach Sch B 2 18 Interest on savings and temporary cash investments 43,906 43,906 Dividends and interest from securities **Gross rents** Net rental income or (loss) -6,460 Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a Capital gain net income (from Part IV, line 2) * Net short-term capital gain-Income modifications Gross sales less returns & allowances £.3 10a Less: Cost of goods sold of MAY
Gross profit or (loss) (attach schedule) 2.3 Other income (attach schedule) 12 Total. Add lines 1 through 11 13 Compensation of officers, directors, trustees, etc. Operating and Administrative Expenses Other employee salaries and wages 14 Pension plans, employee benefits 15 16a Legal fees (attach schedule) Accounting fees (attach schedule) 4,000 2,000 2,000 Other professional fees (attach schedule) 17 Taxes (attach schedule) (see page 14 of the instructions) STMT 916 19 Depreciation (attach schedule) and depletion 20 Occupancy Travel, conferences, and meetings ... Printing and publications 22 STMT Other expenses (att. sch) 158 Total operating and administrative expenses. Add lines 13 through 23 5,074 2,079 34,600 Contributions, gifts, grants paid 34,600 Total expenses and disbursements. Add lines 24 and 25 26 39,674 2,079 0 36,679 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements -2,210 Net Investment Income (if negative, enter -0-) 41,845 0 Adjusted net Income (if negative, enter -0-)

Fo	m 990	D-PF (2009) THE LOUISE C. AND ALVIN SLOTNICK	04-35402	07		Page 2
	Part I	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	Er	nd of	year
느	raiti	should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	4	(c) Fair Market Value
Ĭ	1	Cash—non-interest-bearing	42,175	49,9	66	49,966
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶		T.A	.	
		Less: allowance for doubtful accounts ▶			\perp	
	4	Pledges receivable ▶	,		.	
- 1		Less: allowance for doubtful accounts			\Box	
	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)	, ,			` <u> </u>
		Less: allowance for doubtful accounts ▶			\Box	
Ş	8	Inventories for sale or use				
Assets	9	Prepaid expenses and deferred charges				
As	10a	Investments—U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule) SEE STMT 4	668,002	668,0	01	487,350
	С	Investments—corporate bonds (attach schedule) SEE STMT 5	10,000			
1	11	Investments—land, buildings, and equipment basis	» ÷ · · ? · · ·	<u>~</u>	` .	· · · · · · · ·
		Less: accumulated depreciation (attach sch.)				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)				
	14	Land, buildings, and equipment. basis	£	'. × 🔆 🕏	,	8 2 4 ~ · · · · · · · · · · · · · · · · · ·
		Less accumulated depreciation (attach sch.) ▶				
	15	Other assets (describe ▶)				
	16	Total assets (to be completed by all filers—see the				
	l	instructions. Also, see page 1, item I)	720,177	717,9	67	537,316
	17	Accounts payable and accrued expenses				, · « + ', » · 3 '
(O	18	Grants payable				«.,
tie	19	Deferred revenue				
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons				
iak	21	Mortgages and other notes payable (attach schedule)				
۲	22	Other liabilities (describe ▶)				<
	23	Total liabilities (add lines 17 through 22)	0		의	* .
		Foundations that follow SFAS 117, check here ▶			İ	
es	•	and complete lines 24 through 26 and lines 30 and 31.				意からかない
2	24	Unrestricted				
ala	25	Temporarily restricted				
ä	26					W. St. C.
or Fund Balances	İ	Permanently restricted Foundations that do not follow SFAS 117, check here ▶ X		1		
교	ł	and complete lines 27 through 31.				
9	27	Capital stock, trust principal, or current funds				
ţ	28	Paid-in or capital surplus, or land, bldg., and equipment fund				M. State of the Control of the Contr
Net Assets	29	Retained earnings, accumulated income, endowment, or other funds	720,177	717,9	67	
As	30	Total net assets or fund balances (see page 17 of the			1	
et		instructions)	720,177	717,9	67	
Z	31	Total liabilities and net assets/fund balances (see page 17				Sagar San San San San San San San San San San
		of the instructions)	720,177	717,9	67	NAME OF ALL
_	Part					
1		I net assets or fund balances at beginning of year-Part II, column (a), line 30 (mu				
	end-	of-year figure reported on prior year's return)		L	1	720,177
2		er amount from Part I, line 27a			2	-2,210
3	3 Othe			L	3	
4	4 Add			1	4	717,967
5	5 Dec				5	
_6	3 Tota	I net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (6	717,967
						Form 990-PF (2009)

	SE C. AND ALVIN SLOTNIC		04-3540207	**.		Page 3
(a) List and describe t	Losses for Tax on Investment Inc he kind(s) of property sold (e.g., real estate, use, or common stock, 200 shs MLC Co.)	ome	(b) How acquired P—Purchase D—Donation	(c) Date acc		(d) Date sold (mo , day, yr)
1a 400 SHS ROYAL BA	NK OF SCOTLAND GRP		P	09/20	/07	11/06/09
b MERRILL LYNCH			-		,	
<u>c</u>						
d						
е						
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or or plus expen		((ı or (loss)) mınus (g)
a 3,540			10,000			-6,460
b						
С			···· <u>-</u>			
d						
<u>e</u>		40/04/0				
Complete only for assets showing g	pain in column (h) and owned by the foundation					(h) gain minus
(I) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess over col	` '			less than -0-) or om col (h))
	2001 1201100	0.0.00	0/, 2			-6,460
						-0,400
c						
d						
е						
2 Capital gain net income or (net cap3 Net short-term capital gain or (loss)	ital loss) If gain, also enter in Part I, Ii If (loss), enter -0- in Part I, Ii as defined in sections 1222(5) and (6):	•		2		-6,460
If (loss), enter -0- in Part I, line 8	olumn (c) (see pages 13 and 17 of the instruc			3_		
Part V Qualification Und	er Section 4940(e) for Reduced Ta	x on Net I	nvestment Inco	me		
(For optional use by domestic private for	oundations subject to the section 4940(a) tax of	on net investr	ment income.)			
If section 4940(d)(2) applies, leave this	part blank.					
Was the foundation liable for the section	n 4942 tax on the distributable amount of any	vear in the b	ase period? Ye	s X No		
	under section 4940(e). Do not complete this					
	ch column for each year; see page 18 of the II	<u> </u>	efore making any en	tries.		
(a) Base penod years	(b)		(c)			(d)
Base penod years Calendar year (or tax year beginning in)	Additional according to a distance of the a	Net value o	of noncharitable-use as:	sets	Dist (col (b)	nbution ratio divided by col. (c))
2008	20,452		531,			0.038501
2007	77,675		680,	148		0.114203
2006	72,197		732,	141		0.098611
2005	192,840		638,			0.301838
2004	305,963	<u> </u>	584,	722		0.523262
2 Total of line 1, column (d)	/ear base period—divide the total on line 2 by	 5 or by the		. 2		1.076415
	been in existence if less than 5 years			3		0.215283
4 Enter the net value of noncharitable	e-use assets for 2009 from Part X, line 5			4		451,313
5 Multiply line 4 by line 3				5	_	97,160
6 Enter 1% of net investment income	(1% of Part I, line 27b)			6		418
7 Add lines 5 and 6		••		7		97,578
8 Enter qualifying distributions from F	•				I	

Part VI instructions on page 18.

Form	990-PF (2009) THE LOUISE C. AND ALVIN SLOTNICK 04-3540207				Pa	age 4
Pa	irt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the in	struc	tions)			
1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1.	- 1				
	Date of ruling or determination letter: (attach copy of letter If necessary—see Instructions)		·			4
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check	1			{	337
	here ▶ ☐ and enter 1% of Part I, line 27b					
С	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 fines 1 and 2	3			1	837
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4				0
	·· F	5				337
5	Tax based on Investment Income. Subtract line 4 from line 3. If zero or less, enter -0-					557
6	Credits/Payments:	,	*			
a	2009 estimated tax payments and 2008 overpayment credited to 2009 6a 1,035	\ \				
Ь	Exempt foreign organizations—tax withheld at source		•			1
С	Tax paid with application for extension of time to file (Form 8868) 6c					
d	Backup withholding erroneously withheld 6d 6d					· -
7	Total credits and payments. Add lines 6a through 6d	7			1,(<u>035</u>
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				198
<u>1</u> 1	Enter the amount of line 10 to be: Credited to 2010 estimated tax 198 Refunded	11				
Pa	rt VII-A Statements Regarding Activities					
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it			٠,	Yes	No
	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	•			7	
	published or distributed by the foundation in connection with the activities.			. A.	4	j.
	Did the foundation file Form 1120-POL for this year?		<u> </u> -	1c		X
C	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:		· -		,	
d	(1) On the foundation. \$			₩,		- %
		•	1	٠,	Ng.	
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed		l.	Ę	{ _p ,	
	on foundation managers. ▶ \$]-			7
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		·	_2	—–	X
	If "Yes," attach a detailed description of the activities.					
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of		- 1	نشب		
	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		 -	_ 3		<u> </u>
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?			4a		X
þ	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?	,	L	5		X
	If "Yes," attach the statement required by General Instruction T.		- 1			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:		- 1			7.31
	By language in the governing instrument, or					3
	By state legislation that effectively amends the governing instrument so that no mandatory directions that				2.63	X
	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	•		33	1 1	A, 1
	instructions) • MA				1.9	
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General	• • • •			47	· :•;** **
~	(an designate) of each state or each had by Organity at the COMMING Brother control from		ř	8b	X	
o.	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or	•	··· ├	30		_
9			<u> </u> -			<u> </u>
	4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page		j			•
	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		1			.
	names and addresses			10		<u>x</u>

Form	1990-PF (2009) THE LOUISE C. AND ALVIN SLOTNICK 04-3540207		P	<u>age 5</u>
	art VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
	meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		\mathbf{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	Х	
	Website address ► N/A			
14	The books are in care of ▶ LOUISE SLOTNICK Telephone no. ▶ 617	-939-	-722	8
• •	47 OAKVALE ROAD	•		•
	Located at ▶ NEWTON, MA ZIP+4 ▶ 024	68		
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	•		
Pa	art 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?	.	, ,	٠.
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			
	disqualified person?	,	. s.	
	disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X N	- 1		.
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	。	- "	7 14
	(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)?	o ``	, ,	變
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the			, i
	foundation agreed to make a grant to or to employ the official for a period after	-	ľ	194
	termination of government service, if terminating within 90 days.)	م أ _م .	1,	; ,
ь	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			7
_	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	A 1b		
	Organizations relying on a current notice regarding disaster assistance check here	7		100
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that		31 -	15
_	were not corrected before the first day of the tax year beginning in 2009?	A 1c		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private	耕	1.0	ř.,
	operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		1	1
а	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and	*	1	-t-
	6e, Part XIII) for tax year(s) beginning before 2009?	0		
	If "Yes," list the years ▶ 20 , 20 , 20 , 20	1.*	1,	1
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		1:	لــــــــــــــــــــــــــــــــــــــ
	all years listed, answer "No" and attach statement—see page 20 of the instructions.)	A 2b		<u> </u>
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	- 1		1.5
	▶ 20 , , 20 , , 20 , , 20	1, 5	4	13
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise	2 \ \(\times_{\text{P}_2} \)	1	2.5
	at any time during the year?	o 🧏	1 50 v	1 (
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or	يت.	1	1
	disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the			1888°
	Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of	1.		
	the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine If the	نــا	1	1
	foundation had excess business holdings in 2009.)	A 3b	┷	<u> </u>
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?	<u>, 4b</u>		X
		Form 9	90-PF	(2009)

Form	990-PF (2009) THE LOUISE C. AND ALVIN SLOTNIC	K 04-3	540207			<u>Pa</u>	ge 6
Pε	rt VII-B Statements Regarding Activities for Which Form	4720 May Be R	equired (cont	inued)			
5a	During the year did the foundation pay or incur any amount to:		_	_			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1945(e))?		'es 🗶 No 📗	;		
	(2) Influence the outcome of any specific public election (see section 4955); or	to carry on,	_		İ	- 1	
	directly or indirectly, any voter registration drive?			'es 🕱 No		- 1	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?		· · · · 🔲 v	es 🗶 No		- 1	
	(4) Provide a grant to an organization other than a charitable, etc., organization		· · —		,		
	section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the inst			'es 🗶 No	- 1	i	- {
	(5) Provide for any purpose other than religious, charitable, scientific, literary, o			_	,	ļ	
	purposes, or for the prevention of cruelty to children or animals?		\Box	es X No			
b	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under	er the exceptions de	escribed in				
•	Regulations section 53.4945 or in a current notice regarding disaster assistance			N/A	5b		
	Organizations relying on a current notice regarding disaster assistance check he			▶ □	-	7	
С	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from	• • •			- 1]	
·	because it maintained expenditure responsibility for the grant?	om are wax	N/A 🗍	res No	-> -C,	1	`
	If "Yes," attach the statement required by Regulations section 53.4945-5(d).	•	÷•/ 🗀 ·			ı	,
c-		ov promiume			.	ŀ	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to proceed the efficiency of the second base of	ay premiums		res X No	`, <i>f</i> ^		
	on a personal benefit contract?		Ш	es Er No			×
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a pe	rsonal benefit conti	actr		6b		
_	If "Yes" to 6b, file Form 8870.		п,	res X No	43	- 7	
7a	At any time during the tax year, was the foundation a party to a prohibited tax sh		🖵		<u></u>		
b	If yes, did the foundation receive any proceeds or have any net income attributa			N/A	7b		
· R	Information About Officers, Directors, Trustees, Fo	undation Man	agers, Hignly	Paid Employe	ees,		
	and Contractors		-64b - 1441				
1 1	ist all officers, directors, trustees, foundation managers and their compensa-	tion (see page 22	of the instruction		г –		
		(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit	(e) Ex	pense ac	ccount.
	(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	plans and deferred		er allowar	
		 	- '	compensation	 		
LC	UISE C. SLOTNICK NEWTON	TRUSTEE					
47	OAKVALE ROAD MA 02468	1.00	0	0	-		_
					<u> </u>		
					1		
					ļ		
		.					
		J	l	<u> </u>			
2	Compensation of five highest-paid employees (other than those included of	n line 1—see page	23 of the instruc	tions).			
	If none, enter "NONE."	· · · · · · · · · · · · · · · · · · ·					
		(b) Title, and average	•	(d) Contributions to	/a) E		oogunt.
	(a) Name and address of each employee paid more than \$50,000	hours per week	(c) Compensation	employee benefit plans and deferred		opense ad er allowar	
		devoted to position	L	compensation			
NO	NE	.]					
••					l		
						-	
• • •							
		1					
		1	j				
		1	1				
				1	1		
		1			†		
					1		
	Laurabor of other ampleyage said over \$50,000		1		<u></u>		0
lota	I number of other employees paid over \$50,000						
				Fo	rm ササ	ソーピト	(2009)

Part VIII Information About Officers, Directors, Trustees, Foundation M and Contractors (continued)	:-3540207 anagers, Highly Paid Em	Page 7 ployees,
3 Five highest-paid independent contractors for professional services (see page 23 of the in	structions). If none, enter "NO!	IE."
(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		<u> </u>
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical informatio organizations and other beneficianes served, conferences convened, research papers produced, etc.	n such as the number of	Expenses
1 N/A		
··· · · · · · · · · · · · · · · · · ·		
2		,
3		
4		
Part IX-B Summary of Program-Related Investments (see page 24 of the	ne 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 there are the district of the second of		
All other program-related investments See page 24 of the instructions 3		
Total. Add lines 1 through 3)	

	1990-PF (2009) THE LOUISE C. AND ALVIN SLOTNICK 04-3540207		ge 8
Pa	Minimum Investment Return (All domestic foundations must complete this part. For	eign 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:		
а	Average monthly fair market value of securities	1a 408,7	
b	Average of monthly cash balances	1b 49,4	<u>78</u>
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 458,1	86
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3 458,1	<u>.86</u>
4	Cash deemed held for charitable activities. Enter 11/2 % of line 3 (for greater amount, see page 25 of	1	
	the instructions)	4 6,8	73
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 451,3	<u>13</u>
6	Minimum Investment return. Enter 5% of line 5	6 22,5	66
Pa	urt XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private of	operating	
	foundations and certain foreign organizations check here and do not complete this part)	,	
1	Minimum investment return from Part X, line 6	1 22,5	66
2a	Tax on investment income for 2009 from Part VI, line 5	<u>'</u>	
b	Income tax for 2009. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c 8	37
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 21,7	29
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5 21,7	29
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 21,7	29
Ďe	art XII Qualifying Distributions (see page 25 of the instructions)		
Pe	Qualifying Distributions (see page 25 of the instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	28.2	
а	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a 36,6	<u> 79</u>
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:		
а	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 36,6	<u> 79</u>
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6 36,6	5 79
	Note. The amount on line 6 will be used in Part V, column (b). In subsequent years when calculating whether the found	lation	

qualifies for the section 4940(e) reduction of tax in those years.

Form	990-PF (2009) THE LOUISE C. AND ALVIN	SLOTNICK	04-35402	07	Page 9
Pa	rt 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,	Corpus	Tears prior to 2000	2000	21,729
2	line 7				
a	Enter amount for 2008 only				
	Total for prior years: 20 , 20 , 20				
3	Excess distributions carryover, if any, to 2009:	,			
а	From 2004 277,491	*			
b	From 2005 161,976				
c	From 2006 39,104	٠,		د	*
d	From 2007 44,857	•	,, ,	,	
е	From 2008 5,073				,
f	Total of lines 3a through e	528,501			
4	Qualifying distributions for 2009 from Part XII,	, ,			
	line 4: ▶ \$ 36,679	·	,		**
	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)		· **	*	₹
С	Treated as distributions out of corpus (Election				,
4	required—see page 26 of the instructions) Applied to 2009 distributable amount	·	· · · · · · · · · · · · · · · · · · ·	ş	21,729
u e	Remaining amount distributed out of corpus	14,950	1 sul		4
5	Excess distributions carryover applied to 2009		×.	~	
	(If an amount appears in column (d), the same	A STATE OF	, , , ,		* î
	amount must be shown in column (a).)			*" - ` ` "	
6	Enter the net total of each column as	- \$ ₹ . \$ x - x - x		· _4 ,	4. · · · · · · · · · · · · · · · · · · ·
	indicated below:			·	
а	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	543,451	₩. 1		,
b	Prior years' undistributed income. Subtract				
	line 4b from line 2b	A : , , , , , , , , , , , , , , , , , ,		٧٠٠. *	* 43
С	Enter the amount of prior years' undistributed			<u>}</u>	, ,
	income for which a notice of deficiency has			**)	* 1
	been issued, or on which the section 4942(a)			414	: ,
	tax has been previously assessed				
d	Subtract line 6c from line 6b. Taxable				, .
_	amount—see page 27 of the instructions Undistributed income for 2008. Subtract line				
е	4a from line 2a. Taxable amount—see page	3.3			
	O7 of the instructions	The same of the sa			
f	Undistributed income for 2009. Subtract lines	N 12. A. A. W.	4 4 19 4		
•	4d and 5 from line 1. This amount must be				
	distributed in 2010	Bed THIS . S. S. de . de	randess is a state of		0
7	Amounts treated as distributions out of corpus		Story Water	,	,
	to satisfy requirements imposed by section		E STATE		
	170(b)(1)(F) or 4942(g)(3) (see page 27 of the		, , , , , , , , , , , , , , , , , , , ,		
	instructions)		182 A 74		
8	Excess distributions carryover from 2004 not		The same		
	applied on line 5 or line 7 (see page 27 of the		4 4 4 W		:
	instructions)	277,491	# *** · · ·		
9	Excess distributions carryover to 2010.	265 060			
	Subtract lines 7 and 8 from line 6a	265,960	* .,		
10	Analysis of line 9: Excess from 2005 161, 976		,	1	
a	20.40		· · · · · · · · · · · · · · · · · · ·		
b		₩			
C L	Excess from 2007 44,857 Excess from 2008 5,073	— ('Aγγέε') γ ε 1860 ° - (2 ¹⁷) '	8 5	1	
a	Excess from 2009 14,950	- x x	1		

1a If the foundation has received a ruling or determination letter that it is a private operating of coundation, and the ruling is fertic free date of the ruling is fertic free	Pa	art XIV Private Operating Fou	ındations (see p	age 27 of the inst	ructions and Part	VII-A, question 9)	
b. Check box to indicate whisher the foundation is a privale operating doundation described in section 4 \$42(0)(3) cm. 4 \$42(0)(5) cm. 4 \$42(0	1a	If the foundation has received a ruling or	determination letter th	nat it is a private operat	ing		
b. Check box to indicate whisher the foundation is a privale operating doundation described in section 4 \$42(0)(3) cm. 4 \$42(0)(5) cm. 4 \$42(0		foundation, and the ruling is effective for	2009, enter the date of	of the ruling	•		
2a Enter the lesser of the adjusted net	ь					942(i)(3) or 4942	(i)(5)
Income from Part to the minimum (a) 2009 (b) 2008 (c) 2007 (d) 2006 (p) 1000 (e) 10	2a						
livestment return from Part X for each year fisical b 85% of time 4 c Qualifying distributions from Part XII, line 4 for each year fisical d Anounts included in fine 2c not used directly for sactive conduct of exempt activities c Qualifying distributions made directly for active conduct of exempt activities c Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c Complete 3a, b, or 1 of the allemative test—enter: (1) Value of all assets (2) Value of assets outsilfying under section 4942()(3)(8)() b Endowment alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed C Support affermative test—enter: (1) Total support other than gross investment income (interest, dividends, rents, seyments on securities loans (section) 2) Support in foreigness and provided in section 4942()(3)(8)(0) 2) Support from personal public original public original public loans (section) 2) Support from personal public original public loans (section) 3) (2) Support from personal public original public loans (section) 4) Gross Investment income (interest, dividends, rents, seyments on securities loans (section) 2) Support from personal public original public loans (section) 3) (2) Support from personal public original public loans (section) 4) Gross Investment income (a) Gross Investment income (b) Gross Investment income (c) Support from personal public loans (section) (c) Gross Investment income (c) All support company (section) (d) Gross Investment income (e) Gross Investment income (e) All support company (section) (e) Gross Investment income (e) All support company (section) (e) Gross Investment income (f) For personal public loans (section) (e) Gross Investment income (f) For personal public loans (section) (e) Gross Investment income (f) For personal public loans (section) (e) Gross Investment income (f) For personal public loans (section) (g) Support from personal public loans (section) (g) Suppo				(b) 2008		(d) 2006	(e) Total
each year listed b 85% of the 22 C Qualifying distributions from Part XII, Inc 4 for each year listed Amoun's bucked on line 22 included directive for active conduct of exempt activities. C Qualifying distributions made directly for active conduct of exempt activities. Subtract line 26 from line 2c. C Completo 3a. b, or of or the alternative test—enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(0)(8(8)) Endowment alternative test—enter: (1) Value of assets qualifying under section 4942(0)(8(8)) Endowment alternative test—enter: (2) Value of assets qualifying under section 4942(0)(8(8)) Endowment alternative test—enter: (3) Value of assets qualifying under section 4942(0)(8(8)) Endowment alternative test—enter: (1) Value of assets qualifying under section 4942(0)(8(8)) Endowment alternative test—enter: (1) Value of assets qualifying under section 4942(0)(8(8)) Endowment alternative test—enter: (1) Value of assets qualifying under section 4942(0)(8(8)) Endowment alternative test—enter: (1) Value of assets qualifying under section 4942(0)(8(8)) Endowment alternative test—enter: (1) Value of assets qualifying under section 4942(0)(8(8)) Endowment alternative test—enter: (1) Value of for cach year fisted Support from general public and 5 or more exempt organization as provided in section 4942(0)(8(8))(8)(1) 3. Largest amount of support from an exempt organization as provided in section 4942(0)(8(8))(8)(1) 1. Information Regarding Foundation Managers: 1. Information Regarding Foundation Managers: 1. Ista ny managers of the foundation who have contributed more than \$5,000). (See section 507(d)(2).) N/A. 3. List any managers of the foundation who nave contributed more than \$5,000). (See section 507(d)(2).) N/A. 1. Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here ≥ 2 1 the foundation who nave contributed more than \$5,000. (See section 507(d)(2).) N/A. 3. In the foundation who provided the person to whom a			(2) 2000	(4) 230		(4) 2000	
b 55% of line 2a Cualifying distributions from Part XI, line 4 for each year listed d Anouns included in line 2a not used directly for active conduct of exempt activities Qualifying distributions made directly for active conduct of exempt activities Cumplete 3a, b, or for the alternative test relied upon: 3 'Assets' alternative test relied upon: 4 'Assets' alternative test relied upon: 5 'Assets' alternative test relied upon: 5 'Assets' alternative test relied upon: 6 'Assets' alternative test relied upon: 7 'Assets' alternative test-enter: 7 (1) Value of all assets 2 Value of assets qualifying under 8 section 4942(0)(3)(5)(5) 8 'Endowment' alternative test-enter 23 9 of minimum investment return shown in Part X, line 6 for each year listed C 'Support' alternative lest-enter: 7 (1) Total support other than gross investment income (inferest, or securities leans (section 512(a)(5), or royalties) 7 (2) Support from general public and 5 or more exempt organizations as provided in 8 section 4942(0)(3)(5)(6)(6) 8 (3) Largest amount of support from 9 ne exempt organization 9 (4) Gross Investment income 1 (6) Gross Investment income 1 (6) Gross Investment income 1 (7) Largest amount of support from 9 ne exempt organization 1 Information Regarding Foundation Managers: 1 Lest any managers of the foundation who ave contributed more than 2% of the total contributions received by the foundation before the close of any lax year (but only if they have contributed more than 55,000). Ges section 97(6)(2). N/A 1 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here ► 2 (1) the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the 9 ownership of a partnership or other entity of which the foundation has a 10% or greater interest. N/A 1 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here ► 2 (1) the foundation only makes contributions to preselected charibable organizations and does not accept unasolic						i	
C Qualifying distributions from Part XI, line 4 for each year listed d Arnouris induced in line 2 and used directly for active conduct of exempt activities Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c. Subtract line 2d from line 2c. 3 Complete 3a, b, or for the alternative test—enter: (1) Yalue of all assets (2) Yalue of assets qualifying under section 4942(t)(3)(8)(t) b "Endowment" alloraribly test—enter 23 of minimum investment return shown in Part X, line 6 for each year listed c "Support" alternative test—enter: (1) Totals support distributions and support from an exemption of the stock, rents, payments on securities loans (section 512(e)(5), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(t)(3)(9)(t) (1) (3) Largest amount of support from an exempt organizations as provided in one of the foundation who have contributed more than 55,000). (See section 507(d)(2).) N/A List any managers of the foundation who have contributed more than 55,000). (See section 507(d)(2).) N/A List any managers of the foundation who have contributed more than 55,000). (See section 507(d)(2).) N/A List any managers of the foundation who have contributed more than 55,000). (See section 507(d)(2).) N/A List any managers of the foundation who have contributed more than 55,000). (See section 507(d)(2).) N/A List any managers of the foundation who have contributed more than 55,000). (See section 507(d)(2).) N/A List any managers of the foundation only own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entry of which the foundation has a 10% or greater interest. Information Regarding Foundation and makes gifts, grants, sec. (see page 28 of the instructions) to individuals or organizations under other conditions, complete litems 2a, b, c, and d. The name, address, and telephone number of the person to whom applications shou	6	• • • • • •					
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Complete 3a, b, or c for the alternative test—enter: (I) Value of all assets (2) Value of assets qualifying under section 4942(t)(3)(B)(t) Endowment* alternative test—enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(t)(3)(B)(t) Endowment* alternative test—enter 23 of minimum investment return shown in Part X, line 6 for each year listed C *Support* alternative test—enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities) cans (section 512(a)(5), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(t)(3)(B)(f)(B)(b) (3) Largest amount of support from an exempt organization as provided in section 4942(t)(3)(B)(B)(B)(B)(B)(B)(B)(B)(B)(B)(B)(B)(B)	a	•					
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3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test relied upon: (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(8)(l)) b "Endowment" alternative test—enter 23 of minimum investment return shown in Part X, line 6 for each year listed 'Support alternative test—enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 5:12(a)(5)), or royalities) (2) Support from general public and 5 or more exempt organization say provided in section 4942(j)(3)(B)(iii) (3) Largest amount of support from an exempt organization and section 4942(j)(3)(B)(iii) (3) Largest amount of support from an exempt organization and section 4942(j)(3)(B)(iii) (3) Largest amount of support from an exempt organization and section 4942(j)(3)(B)(iii) (3) Largest amount of support from an exempt organization and section 4942(j)(3)(B)(iii) (3) Largest amount of support from before the close of any tax year (but only if they have contributed more than 2% of the load contributions received by the foundation before the close of any tax year (but only if they have contributed more than 55,000). (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 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here b 🗵 (if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gits, grants, etc. (see page 28 of the instructions)		•					
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Form 990-PF (2009) THE LOUISE C. AND ALVIN SLOTNICK 04-3540207 Page 11 Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation Recipient Purpose of grant or show any relationship to status of **Amount** contribution any foundation manager recipient Name and address (home or business) or substantial contributor Paid during the year SEE STATEMENT 6 34,600 34,600 ▶ 3a Total Approved for future payment N/A **▶** 3b Total

DAA

Form 990-PF (2009)

ASSOCIATES, LLP

01581

1400 COMPUTER DRIVE, SUITE 200

MA

Phone no 508-926-2400 Form 990-PF (2009)

number (see Signature on

page 30 of the instructions)

P00062982

EIN > 26-1593950

Check if

05/11/10

self-employed ▶

Paid Preparer's Use Only

Preparer's

and ZIP code

Firm's name (or yours if

self-employed), address,

ROSEN

WESTBOROUGH,

signature

Page 1 5/11/2010 5:02 PM 4-3 2,000 2,000 Charitable Purpose Charitable Charitable Charitable Purpose Purpose Purpose Ś ŝ Adjusted Net Adjusted Net Adjusted Adjusted Set Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses źζ. Statement 2 - Form 990-PF, Part I, Line 18 - Taxes Form 990-PF, Part I, Line 16a - Legal Fees 2,000 2,000 Investment Investment Investment Investment **Federal Statements** Net Net 916 158 158 881 35 4,000 4,000 Total Total Total Total 13012D THE LOUISE C. AND ALVIN SLOTNICK Ś FEDERAL ESTIMATED TAXES Description Description Description Description MA STATE FILING FEE MANAGEMENT FEE LOURIE & CUTLER FYE: 12/31/2009 FEDERAL TAXES ROSEN & ASSOC TOTAL TOTAL TOTAL TOTAL 04-3540207 EXPENSES

Federal Statements

FYE: 12/31/2009

TOTAL

04-3540207

5/11/2010 5:02 PM Page 2

Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description				
	Beginning of Year	End of Year	Basis of Valuation	Fair MarketValue
ALLIED CAPITAL				
\$ CHARLES RIVER LABS	53,232 \$	53,232	COST	\$ 7,220
CHARLES RIVER LABS	10,204	10,204	COST	7,917
EATON VANCE TAX MANAGED BUY-RITE OF	PP 100,000	100,000	COST	75,250
EATON VANCE TAX DIV INC DIV INC FD	65,239	65,238	COST	44,184
HOSPITALITY PPTYS TRUST REIT	28,488	28,488	COST	16,597
PIMCO CORPORATE INCOME	56,876	56,876		49,860
TEMPLETON EMERG MKT INC	56,781	56,781		64,845
PIMCO CORPORATE OPPTY FD	30,701	30,701	COBI	01,013
DUG UZOU TNOONE EDUGE	62,160	62,160	COST	57,600
DWS HIGH INCOME TRUST	38,168	38,168	COST	21,175
BLACKROCK PFD INC STRAT	58,746	58,746	COST	23,450
WESTERN ASSET HIGH INCOME OPPORTUN	IТ 38,109	38,109	COST	29,900
FRANKLIN HIGH INCOME FD	99,999	99.999	COST	89.352

Statement 5 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

668,002 \$

668,001

Description				
	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
ROYAL BK SCOTLAND GRP PLC SER T 0	7.2	ė	COST	ė
TOTAL \$	10,000	· 	_	\$ 0

487,350

13012D THE LOUISE C. AND ALVIN SLOTNICK 04-3540207 FYE: 12/31/2009		Federal Statements		5/11/2010 5:02 PM Page 3
Statement 6 -	Form 990-PF, Part)	Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year	ibutions Paid During the	
Name	Address Relationship	Status	Purpose	Amount
NIE VILLAGES				100
FRIENDS OF DEVOTION SCHOO				1,000.
JODI FISHER HOROWITZ LEUK				100.
NWH CHARITABLE FOUND				1,800
HEBREW SENIOR LIFE WOMANS				200
N-W CHARITABLE FOUNDATION				11,000
OME J FUND				100
CHILDREN'S HOSPITAL				15,000
MGH PSYCHIATRY				5,000
TOTAL				34,600
•				
				9