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

2009

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 THE ALBERT J. GIFFORD CHARITABLE TRUST		A Employer identification number 04-6023790
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 370 MAIN STREET, 12TH FLOOR		B Telephone number (508) 459-8000
	City or town, state, and ZIP code WORCESTER, MA 01608-1779		C If exemption application is pending, 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		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,813,457.		J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	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 ☐

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)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		260.	260.		STATEMENT 1
4 Dividends and interest from securities		38,119.	37,142.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<135,026.>			
b Gross sales price for all assets on line 6a		1,107,694.			
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		332.	332.		STATEMENT 3
12 Total. Add lines 1 through 11		<96,315.>	37,734.		
13 Compensation of officers, directors, trustees, etc		5,000.	2,500.		2,500.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 4		17,000.	8,500.		8,500.
b Accounting fees STMT 5		1,172.	1,172.		0.
c Other professional fees					
17 Interest		200.	200.		0.
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		70.	0.		70.
24 Total operating and administrative expenses. Add lines 13 through 23		23,442.	12,372.		11,070.
25 Contributions, gifts, grants paid		90,002.			90,002.
26 Total expenses and disbursements. Add lines 24 and 25		113,444.	12,372.		101,072.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<209,759.>			
b Net investment income (if negative, enter -0-)			25,362.		
c Adjusted net income (if negative, enter -0-)				N/A	

914 14

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				
	2	Savings and temporary cash investments		163,224.	45,925.	45,925.
	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 STMT 8		85,327.	144,655.	237,111.
	b	Investments - corporate stock STMT 9		1,589,257.	1,449,183.	1,530,421.
	c	Investments - corporate bonds				
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)		1,837,808.	1,639,763.	1,813,457.	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable		170,000.	133,000.	
	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)		170,000.	133,000.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ☒ and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds		1,905,623.	1,837,808.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds		<237,815.>	<331,045.>	
30	Total net assets or fund balances		1,667,808.	1,506,763.		
31	Total liabilities and net assets/fund balances		1,837,808.	1,639,763.		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,667,808.
2	Enter amount from Part I, line 27a	2	<209,759.>
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	54,405.
4	Add lines 1, 2, and 3	4	1,512,454.
5	Decreases not included in line 2 (itemize) ▶ NOL - PARTNERSHIPS	5	5,691.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,506,763.

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		P		
b		P		
c CAPITAL GAINS DIVIDENDS				
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 27,059.		28,760.	<1,701.>
b 1,080,132.		1,213,960.	<133,828.>
c 503.			503.
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			<1,701.>
b			<133,828.>
c			503.
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	<135,026.>
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	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	101,000.	2,090,787.	.048307
2007	120,075.	2,610,150.	.046003
2006	139,188.	2,512,799.	.055392
2005	122,577.	2,393,275.	.051217
2004	120,935.	2,235,508.	.054097

2 Total of line 1, column (d)	2	.255016
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	.051003
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,578,214.
5 Multiply line 4 by line 3	5	80,494.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	254.
7 Add lines 5 and 6	7	80,748.
8 Enter qualifying distributions from Part XII, line 4	8	101,072.

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.

Part VI Excise 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 ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	254.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		3	254.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	254.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 1,251.		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c 1,000.		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d		7	2,251.
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	1,997.
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ☒ 1,997. Refunded ☒		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. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		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) ☒ 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

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?	13	X	

Website address ► N/A

14 The books are in care of ► FLETCHER, TILTON & WHIPPLE P.C. Telephone no. ► (508) 459-8000
 Located at ► 370 MAIN STREET 12TH FLOOR, WORCESTER, MA ZIP+4 ► 01608

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?	☐ 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)? 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?	☐ Yes ☒ No	
If "Yes," list the years ► _____, _____, _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see 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?	☐ 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	
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

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?

If "Yes" to 6b, file Form 8870.

6b

X

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
WARNER S. FLETCHER	TRUSTEE			
370 MAIN STREET, 12TH FLOOR				
WORCESTER, MA 016081779	1.40	0.	0.	0.
GIFFORD C. BROWN	TRUSTEE			
7788 MEADOW LANE				
NEWBURGH, IN 47630	0.40	0.	0.	0.
DOUGLAS Q. MEYSTRE	TRUSTEE			
370 MAIN STREET, 12TH FLOOR				
WORCESTER, MA 016081779	0.40	0.	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
NONE				

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
NONE		

Total number of others receiving over \$50,000 for professional services

0

Part IX-A**Summary of Direct Charitable Activities**

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B**Summary of Program-Related Investments**

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	1,456,355.
b	Average of monthly cash balances	1b	145,893.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,602,248.
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	1,602,248.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	24,034.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,578,214.
6	Minimum investment return. Enter 5% of line 5	6	78,911.

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	78,911.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	254.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	254.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	78,657.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	78,657.
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	78,657.

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	101,072.
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	101,072.
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	254.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	100,818.

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 instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				78,657.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	10,410.			
b From 2005	4,489.			
c From 2006	15,324.			
d From 2007				
e From 2008				
f Total of lines 3a through e	30,223.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 101,072.				
a Applied to 2008, but not more than line 2a			0.	
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				78,657.
e Remaining amount distributed out of corpus	22,415.			
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	52,638.			
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				0.
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	10,410.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	42,228.			
10 Analysis of line 9:				
a Excess from 2005	4,489.			
b Excess from 2006	15,324.			
c Excess from 2007				
d Excess from 2008				
e Excess from 2009	22,415.			

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

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
(2) Other assets

b Other transactions:

- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitations

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees

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.

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

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		

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.

Sign Here

Signature of officer or trustee Mark R. Tice Date 9.10.10

Date _____

TRUSTEE

➤ Title

Preparer's
signature

Date	
------	--

08/31/10

☐ Check if self-employee

Preparer's identifying number

Firm's name (or yours if self-employed),
address, and ZIP code

FLETCHER, TILTON & WHIPPLE, P.C.

370 MAIN STREET, SUITE 1250

WORCESTER, MA 01608-1779

EIN ►

Phone no. (508) 459-8000

Form **990-PF** (2009)

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
FTW & CO	87.
FTW & CO - US OBLIGATIONS	173.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	260.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
ENERGY TRANSFER PARTNERS LP	24.	0.	24.
ENTERPRISE PRODUCTS	61.	0.	61.
INERGY LP	6.	0.	6.
NATURAL RESOURCE PARTNERS	3.	0.	3.
STATE STREET BANK - CAP GAINS DIV	503.	503.	0.
STATE STREET BANK - DIVIDENDS	37,048.	0.	37,048.
STATE STREET BANK - NONTAXABLE DIST	977.	0.	977.
TOTAL TO FM 990-PF, PART I, LN 4	38,622.	503.	38,119.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
NATURAL RESOURCE PARTNERS	332.	332.	
TOTAL TO FORM 990-PF, PART I, LINE 11	332.	332.	

FORM 990-PF	LEGAL FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FLETCHER, TILTON & WHIPPLE	17,000.	8,500.		8,500.	
TO FM 990-PF, PG 1, LN 16A	17,000.	8,500.		8,500.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
STATE STREET BANK CUSTODIAL FEE	1,172.	1,172.		0.	
TO FORM 990-PF, PG 1, LN 16B	1,172.	1,172.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
COMMONWEALTH OF MASSACHUSETTS PC FILING FEE	35.	0.		35.	
SOFTWARE PACKAGE	35.	0.		35.	
TO FORM 990-PF, PG 1, LN 23	70.	0.		70.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES			STATEMENT	7
DESCRIPTION	AMOUNT				
DECREASE IN GRANTS PAYABLE	37,000.				
INCREASE IN BASIS PARTNERSHIPS	17,405.				
TOTAL TO FORM 990-PF, PART III, LINE 3	54,405.				

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
STATE STREET BANK - LIMITED PARTNERSHIP	X		144,655.	237,111.
TOTAL U.S. GOVERNMENT OBLIGATIONS			144,655.	237,111.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			144,655.	237,111.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
STATE STREET BANK - CORP STOCK	1,449,183.	1,530,421.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,449,183.	1,530,421.

FORM 990-PF --- GRANT APPLICATION SUBMISSION INFORMATION --- STATEMENT 10
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

WARNER S FLETCHER, 370 MAIN STREET 12TH FLOOR, WORCESTER, MA 01608

TELEPHONE NUMBER

FORM AND CONTENT OF APPLICATIONS

APPLICATION SHOULD BE IN THE FORM OF A LETTER. PLEASE INCLUDE PROOF OF TAX-EXEMPT STATUS, AS WELL AS BUDGET FIGURES FOR THE CURRENT YEAR AND FINANCIAL STATEMENTS FOR THE PRIOR YEAR.

ANY SUBMISSION DEADLINES

APPLICATION SHOULD BE RECEIVED PRIOR TO THE ANNUAL DECEMBER MEETING.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FOCUS OF THE GRANTS IS PRIMARILY IN THE SHREWSBURY, MA AREA OR IN ORGANIZATIONS IN WHICH THE GRANTOR OF THE CHARITABLE TRUST EVINCED INTEREST DURING HIS LIFETIME.

2009 Tax Information Statement

Recipient's Name and Address

GIFFORD CHARITABLE TRUST
370 MAIN STREET - 12TH FLOOR
WORCESTER, MA 01608

37565010

04-6023790

26-3619428

☐ 2nd TIN notice

Account Number:

Recipient's Tax ID number:

Payer's Federal ID number:

☐ Corrected

Payer's Name and Address

FLETCHER, TILTON & WHIPPLE & CO
370 MAIN STREET, 12TH FLOOR
WORCESTER, MA 01608

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Short Term Sales Reported on 1099-B								
1000.0000	94974610	WELLS FARGO CO	08/27/2008	08/11/2009	27,059.30	28,760.00	-1,700.70	0.00
Total Short Term Sales Reported on 1099-B						27,059.30	-1,700.70	0.00
Long Term 15% Sales Reported on 1099-B								
500.0000	03251110	ANADARKO PETROLEUM CORP	03/31/2008	08/11/2009	25,214.35	31,252.00	-6,037.65	0.00
750.0000	03948310	ARCHER DANIELS MIDLAND CO	03/31/2008	08/11/2009	21,374.44	30,682.50	-9,308.06	0.00
750.0000	05430310	AVON PRODUCTS INC	03/31/2008	08/11/2009	23,931.88	29,475.00	-5,543.12	0.00
700.0000	06405810	BANK OF NEW YORK MELLON CORP	03/31/2008	08/11/2009	19,690.49	29,217.02	-9,526.53	0.00
350.0000	07588710	BECTON DICKINSON & CO	03/31/2008	08/11/2009	23,218.40	30,061.50	-6,843.10	0.00
400.0000	09702310	BOEING CO	03/31/2008	08/11/2009	18,231.53	29,739.00	-11,507.47	0.00
4000.0000	17275R10	CISCO SYSTEMS INC	05/04/1999	08/11/2009	84,597.81	114,705.00	-30,107.19	0.00
350.0000	21037110	CONSTELLATION ENERGY GROUP	03/31/2008	08/11/2009	10,308.25	30,931.50	-20,623.25	0.00
500.0000	12640810	CSX CORP COM	03/31/2008	08/11/2009	22,229.47	28,070.00	-5,840.53	0.00
1000.0000	25278710	DIAMONDS TRUST SERIES I	11/04/1999	08/11/2009	92,700.61	106,990.63	-14,290.02	0.00
2000.0000	26864810	EMC CORP COM	03/31/2008	08/11/2009	29,779.43	28,980.00	799.43	0.00
600.0000	29101110	EMERSON ELECTRIC CO	03/31/2008	08/11/2009	21,593.44	31,008.00	-9,414.56	0.00
3000.0000	30231G102	EXXON MOBIL CORPORATION	02/24/1986	11/18/2009	224,274.53	7,641.83	216,632.70	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

2009 Tax Information Statement

Account Number: 37565010
 Recipient's Tax ID number: 04-6023790
 Payer's Federal ID number: 26-3619428

Recipient's Name and Address
 GIFFORD CHARITABLE TRUST
 370 MAIN STREET - 12TH FLOOR
 WORCESTER, MA 01608

☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address
 FLETCHER, TILTON & WHIPPLE & CO
 370 MAIN STREET, 12TH FLOOR
 WORCESTER, MA 01608

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis (Box 3)	Net Gain or Loss (Box 4)	Federal Income Tax Withheld (Box 4)
6800.0000	36960410	GENERAL ELECTRIC CO COM	12/04/1997	08/11/2009	95,197.54	165,750.00	-70,552.46	0.00
500.0000	43851610	HONEYWELL INTERNATIONAL INC	03/31/2008	08/11/2009	17,654.54	28,305.00	-10,650.46	0.00
600.0000	45230810	ILLINOIS TOOL WORKS INC	03/31/2008	08/11/2009	23,939.38	29,028.00	-5,088.62	0.00
900.0000	53055510	LIBERTY GLOBAL INC-A	03/31/2008	08/11/2009	19,331.50	30,802.32	-11,470.82	0.00
1800.0000	53071M10	LIBERTY MEDIA HLDG CORP	03/31/2008	08/11/2009	17,279.55	29,229.84	-11,950.29	0.00
1800.0000	53071M30	LIBERTY MEDIA HLDG CORP CAP SER A	03/31/2008	08/11/2009	30,197.46	28,492.20	1,705.26	0.00
500.0000	58003710	MCDERMOTT INTERNATIONAL INC	03/31/2008	08/11/2009	11,099.71	27,245.00	-16,145.29	0.00
1000.0000	59491810	MICROSOFT CORP	03/31/2008	08/11/2009	23,189.90	28,538.00	-5,348.10	0.00
650.0000	61744644	MORGAN STANLEY COM NEW	03/31/2008	08/11/2009	19,536.48	30,048.01	-10,511.53	0.00
900.0000	G6359F10	NABORS INDUSTRIES LTD	03/31/2008	08/11/2009	15,776.68	30,069.00	-14,292.32	0.00
650.0000	65163910	NEWMONT MINING CORP	03/31/2008	08/11/2009	26,070.82	29,380.00	-3,309.18	0.00
600.0000	70454910	PEABODY ENERGY CORP COM	03/31/2008	08/11/2009	21,073.43	30,414.00	-9,340.57	0.00
350.0000	74005P10	PRAXAIR INC	03/31/2008	08/11/2009	26,896.07	29,288.00	-2,391.93	0.00
350.0000	80685710	SCHLUMBERGER LTD	03/31/2008	08/11/2009	18,507.52	30,173.50	-11,665.98	0.00
2000.0000	81369Y60	SELECT SECTOR SPDR TR FINANCIAL	12/28/1999	08/11/2009	27,559.28	46,972.50	-19,413.22	0.00
600.0000	85891210	STERICYCLE INC COM	03/31/2008	08/11/2009	30,173.22	30,956.40	-783.18	0.00
750.0000	87874220	TECK COMINCO LTD-B	03/31/2008	08/11/2009	18,877.01	30,615.00	-11,737.99	0.00
930.0000	90297330	US.BANCORP DEL COM NEW	04/15/2008	08/11/2009	20,626.86	29,899.50	-9,272.64	0.00
Total Long Term 15% Sales Reported on 1099-B					1,080,131.58	1,213,960.25	-133,828.67	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

ALBERT J GIFFORD CHARITABLE TRUST
U/A DTD 06/26/56 - G C BROWN, D Q
MEYSTRE & W S FLETCHER, TRUSTEES



FLETCHER, TILTON & WHIPPLE, P.C.
C O U N S E L O R S A T L A W

Account: 37565010

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Report Period: From 12/1/2009 To 12/31/2009

Asset Statement

Units	Description	Ticker	Cost Basis	Unit Price	Market Value	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
CASH & EQUIVALENTS								
Money Markets								
35,603.77	FEDERATED MONEY MKT OBLIGS TR TAX FREE OBLIGS FD-INSTL SVC SHS FUND# 397 - PRINCIPAL	TBSXX	35,603.77	1.00	35,603.77	0.00	3.56	0.01
10,121.15	FEDERATED MONEY MKT OBLIGS TR TAX FREE OBLIGS FD-INSTL SVC SHS FUND# 397 - INCOME	TBSXX	10,121.15	1.00	10,121.15	0.00	1.01	0.01
TOTAL Money Markets			45,724.92		45,724.92	0.00	4.57	0.01
Cash								
	Principal Cash		100.00		100.00			
	Income Cash		100.00		100.00			
	Total Cash		200.00		200.00			
TOTAL CASH & EQUIVALENTS			45,924.92		45,924.92	0.00	4.57	0.01
EQUITY								
Common Stock								
Consumer Discretionary								
900	MCDONALDS CORP	MCD	50,571.00	62.44	56,196.00	5,625.00	1,980.00	3.52
600	NATIONAL PRESTO INDUSTRIES INC	NPK	49,935.00	109.23	65,538.00	15,603.00	0.00	0.00
TOTAL Consumer Discretionary			100,506.00		121,734.00	21,228.00	1,980.00	1.63
Consumer Staples								
900	GENERAL MILLS INC COM	GIS	53,449.00	70.81	63,729.00	10,280.00	1,692.00	2.65
1,300	HEINZ H J CO COM	HNZ	54,985.72	42.76	55,588.00	602.28	2,184.00	3.93
1,700	KRAFT FOODS INC CL A	KFT	48,586.00	27.18	46,206.00	(2,380.00)	1,972.00	4.27
600	MONSANTO CO NEW COM	MON	57,951.99	81.75	49,050.00	(8,901.99)	636.00	1.30
1,300	PHILIP MORRIS INTERNATIONAL INC	PM	47,587.75	48.19	62,647.00	15,059.25	3,016.00	4.81
1,000	PROCTER & GAMBLE CO	PG	59,336.00	60.63	60,630.00	1,294.00	1,760.00	2.90
TOTAL Consumer Staples			321,896.46		337,850.00	15,953.54	11,260.00	3.33
Energy								
2,000	ENTERPRISE PRODUCTS PARTNERS LP	EPD	22,340	31.41	62,820.00	33,462.00	4,420.00	7.04
1,000	EXXON MOBIL CORP	XOM	74,570.00	68.19	68,190.00	(6,380.00)	1,680.00	2.46
1,800	INERGY LP	NRGY	20,358	35.68	64,224.00	36,280.00	4,860.00	7.57
TOTAL Energy			117,268		195,234.00	63,362.00	10,960.00	5.61
Health Care								
2,900	HEALTHCARE SERVICES GROUP	HCSG	51,219.22	21.46	62,234.00	11,014.78	2,320.00	3.73
850	JOHNSON & JOHNSON	JNJ	53,441.50	64.41	54,748.50	1,307.00	1,666.00	3.04

ALBERT J GIFFORD CHARITABLE TRUST
U/A DTD 06/26/56 - G C BROWN, D Q
MEYSTRE & W S FLETCHER, TRUSTEES



FLETCHER, TILTON & WHIPPLE, P.C.
C O U N S E L O R S A T L A W

Account: 37565010
Report Period: From 12/1/2009 To 12/31/2009

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Asset Statement(Cont'd)

Units	Description	Ticker	Cost Basis	Unit Price	Market Value	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
1,500	SANOFI-AVENTIS SPONSORED ADR	SNY	48,973.95	39.27	58,905.00	9,931.05	1,676.01	2.85
TOTAL Health Care			153,634.67		175,887.50	22,252.83	5,662.01	3.22
Industrials								
1,400	CATERPILLAR INC COM	CAT	77,778.90	56.99	79,786.00	2,007.10	2,352.00	2.95
3,200	GENERAL ELECTRIC CO COM	GE	49,824.00	15.13	48,416.00	(1,408.00)	1,280.00	2.64
700	LOCKHEED MARTIN CORP COM	LMT	52,660.72	75.35	52,745.00	84.28	1,764.00	3.34
700	3M CO	MMM	53,193.97	82.67	57,869.00	4,675.03	1,428.00	2.47
TOTAL Industrials			233,457.59		238,816.00	5,358.41	6,824.00	2.86
Information Technology								
1,850	HEWLETT PACKARD CO COM	HPQ	82,196.14	51.51	95,293.50	13,097.36	592.00	0.62
400	INTERNATIONAL BUSINESS MACHINES	IBM	47,239.48	130.90	52,360.00	5,120.52	880.00	1.68
2,400	VODAFONE GROUP PLC- SPONSORED ADR	VOD	59,634.00	23.09	55,416.00	(4,218.00)	2,100.34	3.79
TOTAL Information Technology			189,069.62		203,069.50	13,999.88	3,572.34	1.76
Materials								
1,600	DU PONT E I DE NEMOURS & CO	DD	60,213.98	33.67	53,872.00	(6,341.98)	2,624.00	4.87
1,300	RAYONIER INC	RYN	51,610.00	42.16	54,808.00	3,198.00	2,600.00	4.74
TOTAL Materials			111,823.98		108,680.00	(3,143.98)	5,224.00	4.81
Telecommunication Services								
3,200	VERIZON COMMUNICATIONS INC	VZ	97,936.00	33.13	106,016.00	8,080.00	6,080.00	5.73
TOTAL Telecommunication Services			97,936.00		106,016.00	8,080.00	6,080.00	5.73
Utilities								
1,500	DOMINION RESOURCES INC VA	D	50,355.00	38.92	58,380.00	8,025.00	2,625.00	4.50
1,200	NORTHWEST NATURAL GAS CO	NWN	50,171.04	45.04	54,048.00	3,876.96	1,992.00	3.69
TOTAL Utilities			100,526.04		112,428.00	11,901.96	4,617.00	4.11
TOTAL Common Stock			1,440,722.36		1,599,715.00	158,992.64	56,179.35	3.51
Exchange Traded Funds								
Equity Funds - ETF								
2,500	KAYNE ANDERSON ENERGY TOT RETURN FD	KYE	47,274.00	23.10	57,750.00	10,476.00	4,800.00	8.31
TOTAL Equity Funds - ETF			47,274.00		57,750.00	10,476.00	4,800.00	8.31
TOTAL Exchange Traded Funds			47,274.00		57,750.00	10,476.00	4,800.00	8.31
Other								
Master Partnership								
1,100	ENERGY TRANSFER PARTNERS INC		43,701	44.97	49,467.00	3,201.00	3,932.50	7.95
2,500	NATURAL RESOURCE PARTNERS LP		58,256	24.24	60,600.00	1,024.60	5,400.00	8.91
TOTAL Master Partnership			101,957		110,067.00	4,225.60	9,332.50	8.48

ALBERT J GIFFORD CHARITABLE TRUST
U/A DTD 06/26/56 - G C BROWN, D Q
MEYSTRE & W S FLETCHER, TRUSTEES



FLETCHER, TILTON & WHIPPLE, P.C.
C O U N S E L O R S A T L A W

Account: 37565010
Report Period: From 12/1/2009 To 12/31/2009

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Asset Statement(Cont'd)

Units	Description	Ticker	Cost Basis	Unit Price	Market Value	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
TOTAL Other			101,957		110,067.00	4,225.60	9,332.50	8.48
TOTAL EQUITY			1,593,837.76		1,767,532.00	173,694.24	70,311.85	3.96
GRAND TOTAL ASSETS			1,639,762.68		1,813,456.92	173,694.24	70,316.42	3.88

Partnerships

22,340

20,358

43,701

58,256

144,655

Equities

1,593,837.76

< 144,655 >

1,449,182.76

FTW Acting as Administrator for Gifford Grant Payments Made in 2009

Albert J. Gifford Charitable Trust

Organization Name	State/Province	Request ID	Owner	Disposition	Payment Type	Payment Status	Check Date*	Payment Amount
DISMAS HOUSE OF MASSACHUSETTS, INC.	MA	3414485	cwhite	Approved	Check	Paid	12/21/09	\$2,000.00
FIRST CONGREGATIONAL CHURCH	MA	2820839	cwhite	Approved	Check	Paid	03/23/09	\$5,000.00
FIRST CONGREGATIONAL CHURCH	MA	3516534	cwhite	Approved	Check	Paid	12/21/09	\$3,000.00
SHREWSBURY PUBLIC LIBRARY BUILDING AND ENDOWMENT TRUST	MA	2108156	cwhite	Approved	Check	Paid	12/21/09	\$10,000.00
UNITED WAY OF CENTRAL MASSACHUSETTS	MA	3371093	cwhite	Approved	Check	Paid	12/21/09	\$23,000.00
WORCESTER ART MUSEUM	MA	3740671	cwhite	Approved	Check	Paid	12/21/09	\$7,000.00
WORCESTER POLYTECHNIC INSTITUTE	MA	2153720	cwhite	Approved	Check	Paid	12/21/09	\$40,000.00
Albert J. Gifford Charitable Trust Count: 7							Total:	\$90,000.00
Report Count: 7							Total:	\$90,000.00

FTW Acting as Administrator for Gifford Grant Payments Due in 2010 and beyond

Albert J. Gifford Charitable Trust

Organization Name	State/Province	Request ID	Owner	Disposition	Payment Type	Payment Status	Check Date*	Payment Amount
WORCESTER ART MUSEUM	MA	3740671	cwhite	Approved	Check	Scheduled	12/21/10*	\$7,000.00
WORCESTER ART MUSEUM	MA	3740671	cwhite	Approved	Check	Scheduled	12/21/11*	\$6,000.00
WORCESTER POLYTECHNIC INSTITUTE	MA	2153720	cwhite	Approved	Check	Scheduled	12/01/10*	\$40,000.00
WORCESTER POLYTECHNIC INSTITUTE	MA	2153720	cwhite	Approved	Check	Scheduled	12/01/11*	\$40,000.00
WORCESTER POLYTECHNIC INSTITUTE	MA	2153720	cwhite	Approved	Check	Scheduled	12/01/12*	\$40,000.00
Albert J. Gifford Charitable Trust Count: 5							Total:	\$133,000.00
Report Count: 5							Total:	\$133,000.00

26.1

26.1

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization		Employer identification number
	THE ALBERT J. GIFFORD CHARITABLE TRUST		04-6023790
	Number, street, and room or suite no. If a P.O. box, see instructions.		For IRS use only
	370 MAIN STREET, 12TH FLOOR		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
	WORCESTER, MA 01608-1779		

Check type of return to be filed (File a separate application for each return):

- ☐ Form 990 ☐ Form 990-EZ ☐ Form 990-T (sec. 401(a) or 408(a) trust) ☐ Form 1041-A ☐ Form 5227 ☐ Form 8870
☐ Form 990-BL ☒ Form 990-PF ☐ Form 990-T (trust other than above) ☐ Form 4720 ☐ Form 6069

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

FLETCHER, TILTON & WHIPPLE P.C.

- The books are in the care of ☒ 370 MAIN STREET 12TH FLOOR, WORCESTER, MA - 01608

Telephone No. ☒ (508) 459-8000

FAX No. ☐

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2010.**

5 For calendar year **2009**, or other tax year beginning _____, and ending _____.

6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension

ADDITIONAL TIME IS REQUIRED TO FILE AN ACCURATE AND COMPLETE RETURN

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	2,251.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	2,251.
c	Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ☒ *Lidia J. Jonez* Title ☒ **EA**

Date ☒ **7-28-10**

Form **8868** (Rev. 4-2009)