Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , **and ending**

G Check all that apply: [ ] Initial return [ ] Initial return of a former public charity [ ] Final return [ ] Amended return [ ] Address change [ ] Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation: STODDARD CHARITABLE TRUST

Number and street (or P O box number if mail is not delivered to street address): 370 MAIN STREET 12TH FLOOR | Room/suite

City or town, state, and ZIP code: WORCESTER, MA 01608-1779

A Employer identification number 04-6023791

B Telephone number 508-459-8000

C If exemption application is pending, check here ▶ [ ]

D 1. Foreign organizations, check here ▶ [ ]

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

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

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

H Check type of organization: [ ] Section 501(c)(3) exempt private foundation [ ] Section 4947(a)(1) nonexempt charitable trust [X] Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶$ 67,686,870.

J Accounting method: [X] Cash [ ] Accrual [ ] Other (specify) (Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	189,333.	189,333.		STATEMENT 1
	4 Dividends and interest from securities	2,169,299.	2,169,299.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	538,725.			
	b Gross sales price for all assets on line 6a 84,916.				
	7 Capital gain net income (from Part IV, line 2)		538,725.		
	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	4,061.	4,061.		STATEMENT 3
	12 **Total.** Add lines 1 through 11	2,901,418.	2,901,418.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 4	319,737.	248,487.		71,250.
	c Other professional fees STMT 5	39,381.	35,835.		0.
	17 Interest				
	18 Taxes STMT 6	92,907.	0.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 7	1,910.	0.		0.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	453,935.	284,322.		71,250.
	25 Contributions, gifts, grants paid	2,710,814.			2,710,814.
	26 **Total expenses and disbursements.** Add lines 24 and 25	3,164,749.	284,322.		2,782,064.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-263,331.			
	b **Net investment income** (if negative, enter -0-)		2,617,096.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

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

		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	8,416,156.	797,135.	797,135.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 8	37,417,034.	43,209,805.	48,345,448.
	c Investments - corporate bonds STMT 9	3,682,122.	2,478,890.	2,174,325.
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 10	15,829,732.	18,594,636.	16,369,962.
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers)	65,345,044.	65,080,466.	67,686,870.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable	2,100,000.	1,935,000.	
	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)	2,100,000.	1,935,000.	
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 ▶ [X] and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	63,245,044.	63,145,466.	
	30 **Total net assets or fund balances**	63,245,044.	63,145,466.	
	31 **Total liabilities and net assets/fund balances**	65,345,044.	65,080,466.	

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	63,245,044.
2	Enter amount from Part I, line 27a	2	-263,331.
3	Other increases not included in line 2 (itemize) ▶ DECREASE IN PLEDGES OUTSTANDING	3	165,000.
4	Add lines 1, 2, and 3	4	63,146,713.
5	Decreases not included in line 2 (itemize) ▶ PRIOR YEAR ADJUSTMENT	5	1,247.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	63,145,466.

Part IV Capital Gains and Losses for Tax on Investment Income

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

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e	84,916.			538,725.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				538,725.

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	538,725.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	3,659,273.	74,369,615.	.049204
2007	4,026,957.	85,888,910.	.046886
2006	2,933,157.	81,032,336.	.036197
2005	3,344,111.	75,437,183.	.044330
2004	3,459,088.	72,538,734.	.047686

2 **Total** of line 1, column (d)	2	.224303
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	.044861
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	59,448,395.
5 Multiply line 4 by line 3	5	2,666,914.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	26,171.
7 Add lines 5 and 6	7	2,693,085.
8 Enter qualifying distributions from Part XII, line 4	8	2,782,064.

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)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b	1	26,171.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	26,171.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	26,171.
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a: 81,643.		
b	Exempt foreign organizations - tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	81,643.
8	Enter any **penalty** for underpayment of estimated tax. Check here [X] 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	55,472.
11	Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶ 55,472. **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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 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.*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see 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 ▶ 01608-1779

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c		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	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ____, ____, ____, ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)* N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

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

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** X (No)

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? N/A **7b**

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WARNER S. FLETCHER 11 MONMOUTH ROAD WORCESTER, MA 01606	CHAIRMAN/TTEE 10.00	0.	0.	0.
ALLEN W. FLETCHER 53 ELM STREET WORCESTER, MA 01608	TRUSTEE 1.00	0.	0.	0.
JUDITH S. KING 140 MAIN STREET SOUTHBORO, MA	TREAS/TTEE 1.00	0.	0.	0.
VALERIE S. LORING 16 MILITARY ROAD WORCESTER, MA	SEC/TTEE 1.00	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

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
FLETCHER, TILTON & WHIPPLE, P.C. 370 MAIN ST. 12TH FLOOR, WORCESTER, MA 01608	LEGAL, ACCOUNTING & CUSTODIAL	285,000.
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	53,307,356.
b	Average of monthly cash balances	1b	6,567,166.
c	Fair market value of all other assets	1c	479,179.
d	**Total** (add lines 1a, b, and c)	1d	60,353,701.
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	60,353,701.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	905,306.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	59,448,395.
6	**Minimum investment return.** Enter 5% of line 5	6	2,972,420.

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	2,972,420.
2a	Tax on investment income for 2009 from Part VI, line 5 — 2a: 26,171.		
b	Income tax for 2009. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	26,171.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,946,249.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,946,249.
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	2,946,249.

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	2,782,064.
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	2,782,064.
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	26,171.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	2,755,893.

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				2,946,249.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			321,997.	
b Total for prior years: ____, ____, ____		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 2,782,064.				
a Applied to 2008, but not more than line 2a			321,997.	
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				2,460,067.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				486,182.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

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

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year (a) 2009	Prior 3 years (b) 2008	(c) 2007	(d) 2006	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year-see the instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

NONE

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.

NONE

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed:

SEE STATEMENT 11

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHED LIST	NONE	PUBLIC	VARIOUS	2,710,814.
Total			▶ 3a	2,710,814.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

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

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	182,471.	6,862.
4 Dividends and interest from securities			14	2,169,258.	41.
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			15	4,061.	
8 Gain or (loss) from sales of assets other than inventory			14	84,916.	453,809.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		2,440,706.	460,712.

13 Total Add line 12, columns (b), (d), and (e) 13 2,901,418.

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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

b If "Yes," complete the following schedule.

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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

TTEE 10.15.10 ▶ TRUSTEE

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's signature ▶	Date 10/15/10	Check if self-employed ▶ ☐	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

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Schedule K-1

Schedule K-1

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Schedule K-1

STODDARD CHARITABLE TRUST

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	ALLIANCE BERNSTEIN K-1			
b	ALLIANCE BERNSTEIN K-1			
c	MASTHEAD CONCORDIA K-1			
d	FLETCHER TILTON WHIPPLE &CO-SEE ATTACHED			
e	FLETCHER TILTON WHIPPLE &CO-SEE ATTACHED			
f	ENTERPRISE PRODUCTS PRT K-1 SEC 1231 LOSS			12/31/09
g	MARKWEST ENERGY PARTNERS LP-K-1			12/31/09
h	MARKWEST ENERGY LP-SEC 1231 LOSS K-1			12/31/09
i	NATURAL RESOURCE LP - K-1 SEC 1231			12/31/09
j	CAPITAL GAINS DIVIDENDS			
k				
l				
m				
n				
o				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				-4,147.
b				-222.
c				11.
d				554,346.
e				-108,024.
f				-1,654.
g				-2,150.
h				-191.
i				15,840.
j	84,916.			84,916.
k				
l				
m				
n				
o				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(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	
a				-4,147.
b				-222.
c				11.
d				554,346.
e				-108,024.
f				-1,654.
g				-2,150.
h				-191.
i				15,840.
j				84,916.
k				
l				
m				
n				
o				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter "-0-" in Part I, line 7 }	2	538,725.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	N/A

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

SOURCE	AMOUNT
ALLIANCE BERNSTEIN K-1	531.
COMPASS K-1 INTEREST INCOME	9,905.
ENERGY TRANSFER PARTNERS K-1	63.
ENTERPRISE K-1 INT	554.
INERGY K-1 INTEREST	64.
KINDER MORGAN ENERGY PRTS K-1	1,479.
MARKWEST K-1 - INTEREST	6,308.
NATURAL RESOURCE K-1 INTEREST	39.
STATE STREET BANK IMMA	157,700.
STATE STREET BANK UST	12,614.
TERRA NITRO K1	76.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	189,333.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
ALLIANCE BERNSTEIN K-1	1,166.	0.	1,166.
DIVIDEND INCOME K-1-ALLIANCE	20.	0.	20.
ENERGY TRANSFER PARTNERS LP	181.	0.	181.
ENTERPRISE K-1 DIV	41.	0.	41.
FLETCHER TILTON WHIPPLE CO - DIVIDENDS	2,051,538.	84,916.	1,966,622.
FLETCHER TILTON WHIPPLE CO - INTEREST	170,314.	0.	170,314.
KINDER MORGAN ENERGY PTRS KI	119.	0.	119.
MARKWEST K-1 - DIVIDENDS	4,350.	0.	4,350.
MOORS & CABOT-DIVIDENDS	26,392.	0.	26,392.
PLAINS ALL AMERICAN-INT	20.	0.	20.
PLAINS ALL AMERICAN-KI DIV	74.	0.	74.
TOTAL TO FM 990-PF, PART I, LN 4	2,254,215.	84,916.	2,169,299.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
K-1: NATURAL RESOURCES-ROYALTY	4,061.	4,061.	
TOTAL TO FORM 990-PF, PART I, LINE 11	4,061.	4,061.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FLETCHER TILTON & WHIPPLE	285,000.	213,750.		71,250.
FTW &CO	34,737.	34,737.		0.
TO FORM 990-PF, PG 1, LN 16B	319,737.	248,487.		71,250.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISC BROKERAGE FEES	3,546.	0.		0.
BANK CHARGES - OTHER	0.	0.		0.
AMORTIZATION	4,791.	4,791.		0.
ACCOUNTING FEES	31,044.	31,044.		0.
TO FORM 990-PF, PG 1, LN 16C	39,381.	35,835.		0.

FORM 990-PF TAXES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX WITHHELD	32,857.	0.		0.
US TREASURY PYMTS	60,050.	0.		0.
TO FORM 990-PF, PG 1, LN 18	92,907.	0.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MASS PC FILING FEE	250.	0.		0.
K-1 INVESTMENT INTEREST EXPENSES	145.	0.		0.
CYBERGRANTS	1,322.	0.		0.
ADR TAX RECLAMATION FEE	193.	0.		0.
TO FORM 990-PF, PG 1, LN 23	1,910.	0.		0.

FORM 990-PF CORPORATE STOCK STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
STATE STREET BANK CORP STOCK	32,797,124.	40,382,458.
STATE STREET BANK MUTUAL FUNDS	10,412,681.	7,962,990.
TOTAL TO FORM 990-PF, PART II, LINE 10B	43,209,805.	48,345,448.

FORM 990-PF CORPORATE BONDS STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
STATE STREET BANK CORP BONDS	2,478,890.	2,174,325.
TOTAL TO FORM 990-PF, PART II, LINE 10C	2,478,890.	2,174,325.

FORM 990-PF OTHER INVESTMENTS STATEMENT 10

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
LIMITED PARTNERSHIPS	COST	4,310,147.	5,270,634.
SSB PREFERRED STOCK	COST	14,284,489.	11,099,328.
TOTAL TO FORM 990-PF, PART II, LINE 13		18,594,636.	16,369,962.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A THROUGH 2D STATEMENT 11

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

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

TELEPHONE NUMBER

508-459-8000

FORM AND CONTENT OF APPLICATIONS

APPLICATIONS SHOULD BE MADE BY LETTER SUBMITTED IN QUINTUPLICATE SUMMARIZING A REQUEST, TOGETHER WITH BACKGROUND INFORMATION. INCLUDE A COPY OF THE IRS TAX EXEMPTION LETTER.

ANY SUBMISSION DEADLINES

APPLICATIONS SHOULD BE RECEIVED TWO OR MORE WEEKS PRIOR TO ONE OF FIVE OR SIX YEARLY DISTRIBUTION MEETINGS.

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS ARE AWARDED IN THE CULTURAL, EDUCATIONAL AND SOCIAL SERVICE NEED AREAS IN THE CITY OF WORCESTER ONLY.

FTW Acting as Administrator for
Stoddard Grant Payments Made in 2009

Stoddard Charitable Trust

Organization Name	State/Province	Request ID	Owner	Disposition	Payment Type	Payment Status	Check Date*	Payment Amount
AIDS PROJECT WORCESTER	MA	3240946	cwhite	Approved	Check	Paid	06/23/09	$15,000.00
AMERICAN CANCER SOCIETY - HOPE LODGE	MA	3741074	cwhite	Approved	Check	Paid	12/17/09	$70,000.00
AMERICAN RED CROSS OF CENTRAL MASSACHUSETTS	MA	3355372	cwhite	Approved	Check	Paid	09/21/09	$20,000.00
ANNA MARIA COLLEGE	MA	1929901	cwhite	Approved	Check	Paid	12/17/09	$50,000 00
ATHOL AREA YMCA	MA	3403103	cwhite	Approved	Check	Paid	12/17/09	$5,000.00
BARRE PLAYERS INC	MA	3021109	cwhite	Approved	Check	Paid	03/23/09	$2,500.00
BECKER COLLEGE	MA	1935350	cwhite	Approved	Check	Paid	12/17/09	$50,000.00
BOTTOM LINE (THE)	MA	3393956	cwhite	Approved	Check	Paid	09/21/09	$5,000.00
CAMP PUTNAM OF THE WORCESTER FRESH AIR FUND, INC	MA	2965809	cwhite	Approved	Check	Paid	04/01/09	$10,000.00
CANAL DISTRICT ALLIANCE	MA	3175962	cwhite	Approved	Check	Paid	06/23/09	$5,000.00
CASA PROJECT, INC. (THE)	MA	3240894	cwhite	Approved	Check	Paid	06/23/09	$20,000.00
CENTRO LAS AMERICAS	MA	2855377	cwhite	Approved	Check	Paid	12/17/09	$15,000.00
CHILDREN'S FRIEND, INC	MA	3741203	cwhite	Approved	Check	Paid	12/17/09	$30,000.00
CLARK UNIVERSITY	MA	2039582	cwhite	Approved	Check	Paid	12/17/09	$50,000 00
CLARK UNIVERSITY	MA	2039582	cwhite	Approved	Check	Paid	12/17/09	$100,000.00
COMMUNITY HEALTHLINK	MA	3499002	cwhite	Approved	Check	Paid	12/17/09	$75,000.00
DISMAS HOUSE OF MASSACHUSETTS, INC	MA	2607869	cwhite	Approved	Check	Paid	10/28/09	$30,000.00
DYNAMY, INC	MA	3742699	cwhite	Approved	Check	Paid	12/17/09	$15,000.00
ECOTARIUM	MA	2734800	cwhite	Approved	Check	Paid	12/17/09	$50,000 00
ECOTARIUM	MA	2734800	cwhite	Approved	Check	Paid	12/17/09	$100,000.00
ELM PARK CENTER FOR EARLY CHILDHOOD EDUCATION, INC	MA	3373992	cwhite	Approved	Check	Paid	09/21/09	$15,000 00
FIRST NIGHT WORCESTER	MA	3173802	cwhite	Approved	Check	Paid	06/23/09	$7,500 00
FITCHBURG ART MUSEUM	MA	3368222	cwhite	Approved	Check	Paid	09/21/09	$10,000.00
FRIENDS OF THE ROGERS-KENNEDY MEMORIAL	MA	3405746	cwhite	Approved	Check	Paid	12/17/09	$5,000.00
GIRLS INCORPORATED OF WORCESTER	MA	3284716	cwhite	Approved	Check	Paid	07/10/09	$8,049.12
GIRLS INCORPORATED OF WORCESTER	MA	3349841	cwhite	Approved	Check	Paid	07/29/09	$6,313.00
GIRLS INCORPORATED OF WORCESTER	MA	3370822	cwhite	Approved	Check	Paid	08/13/09	$7,951.88
GIRLS INCORPORATED OF WORCESTER	MA	3513176	cwhite	Approved	Check	Paid	12/17/09	$10,000.00
GREATER WORCESTER LAND TRUST	MA	2736681	cwhite	Approved	Check	Paid	06/23/09	$60,000.00
GREATER WORCESTER LAND TRUST	MA	2736681	cwhite	Approved	Check	Paid	12/17/09	$60,000.00
HEALTH AWARENESS SERVICES OF CENTRAL MASSACHUSETTS	MA	3124675	cwhite	Approved	Check	Paid	06/23/09	$3,000 00
HENRY LEE WILLIS COMMUNITY CENTER	MA	3393974	cwhite	Approved	Check	Paid	09/21/09	$7,500.00
HIGGINS ARMORY MUSEUM	MA	1375879	cwhite	Approved	Check	Paid	12/17/09	$100,000.00
HIGHER EDUCATION RESOURCE CENTER	MA	3240932	cwhite	Approved	Check	Paid	06/23/09	$2,500.00
JERICHO ROAD PROJECT, INC.	MA	2732622	cwhite	Approved	Check	Paid	12/17/09	$10,000.00
JERICHO ROAD PROJECT, INC.	MA	2732622	cwhite	Approved	Check	Paid	12/17/09	$10,000.00
JOY OF MUSIC PROGRAM, INC	MA	3516542	cwhite	Approved	Check	Paid	12/17/09	$5,000.00
LITERACY VOLUNTEERS OF GREATER WORCESTER	MA	3393961	cwhite	Approved	Check	Paid	09/21/09	$5,000.00
MAIN SOUTH COMMUNITY DEVELOPMENT CORPORATION	MA	3282058	cwhite	Approved	Check	Paid	09/21/09	$20,000 00

* Indicates that Check Date is null and is therefore based on Requested Check Date
Data contained in this report is for management reporting only and should not be used for financial purposes
Not for disclosure outside of FTW Acting as Administrator for unless by written authorization

FTW Acting as Administrator for
Stoddard Grant Payments Made in 2009

Stoddard Charitable Trust

Organization Name	State/Province	Request ID	Owner	Disposition	Payment Type	Payment Status	Check Date*	Payment Amount
MASSACHUSETTS AUDUBON SOCIETY-WORCESTER	MA	2526126	cwhite	Approved	Check	Paid	12/17/09	$50,000 00
MASSACHUSETTS SYMPHONY ORCHESTRA	MA	3150226	cwhite	Approved	Check	Paid	06/23/09	$15,000 00
MOHEGAN COUNCIL, INC., BOY SCOUTS OF AMERICA	MA	3393948	cwhite	Approved	Check	Paid	09/21/09	$75,000.00
MUSIC WORCESTER, INC.	MA	3240840	cwhite	Approved	Check	Paid	06/23/09	$5,000.00
OAK HILL COMMUNITY DEVELOPMENT CORPORATION	MA	3500003	cwhite	Approved	Check	Paid	12/17/09	$10,000.00
PERNET FAMILY HEALTH SERVICE, INC.	MA	3492976	cwhite	Approved	Check	Paid	12/17/09	$20,000.00
PLEASANT STREET NEIGHBORHOOD NETWORK CENTER (UNDER FRIENDLY HOU	MA	3240868	cwhite	Approved	Check	Paid	06/23/09	$7,500 00
QUINSIGAMOND COMMUNITY COLLEGE FOUNDATION	MA	3284738	cwhite	Approved	Check	Paid	09/21/09	$2,000.00
RACHEL'S TABLE	MA	3513209	cwhite	Approved	Check	Paid	12/17/09	$5,000 00
RAINBOW CHILD DEVELOPMENT CENTER, INC.	MA	2497186	cwhite	Approved	Check	Paid	06/23/09	$50,000.00
REGIONAL ENVIRONMENTAL COUNCIL OF CENTRAL MASSACHUSETTS	MA	3740695	cwhite	Approved	Check	Paid	12/17/09	$7,500.00
SALVATION ARMY OF WORCESTER	MA	3240904	cwhite	Approved	Check	Paid	06/23/09	$10,000.00
THE TRUST FOR PUBLIC LAND	MA	3240913	cwhite	Approved	Check	Paid	06/23/09	$10,000.00
TOWER HILL BOTANIC GARDEN	MA	744923	cwhite	Approved	Check	Paid	12/17/09	$150,000 00
TOWER HILL BOTANIC GARDEN	MA	744923	cwhite	Approved	Check	Paid	12/17/09	$150,000.00
TRAINING RESOURCES OF AMERICA, INC.	MA	3018013	cwhite	Approved	Check	Paid	03/23/09	$5,000.00
UNITED WAY OF CENTRAL MASSACHUSETTS	MA	2607757	cwhite	Approved	Check	Paid	09/24/09	$120,000 00
WHITE OAK LAND CONSERVATION SOCIETY, INC	MA	3167985	cwhite	Approved	Check	Paid	06/23/09	$20,000.00
WICN	MA	3300484	cwhite	Approved	Check	Paid	09/21/09	$25,000 00
WORCESTER ART MUSEUM	MA	3740668	cwhite	Pending	Check	Paid	12/17/09	$600,000.00
WORCESTER COMMON GROUND	MA	3240879	cwhite	Approved	Check	Paid	06/23/09	$15,000.00
WORCESTER COMMUNITY ACTION COUNCIL, INC.	MA	3373997	cwhite	Approved	Check	Paid	09/21/09	$5,000.00
WORCESTER COMMUNITY HOUSING RESOURCES, INC.	MA	3517591	cwhite	Approved	Check	Paid	12/17/09	$15,000.00
WORCESTER EAST SIDE COMMUNITY DEVELOPMENT CORPORATION	MA	3226203	cwhite	Approved	Check	Paid	06/23/09	$12,000.00
WORCESTER INTERFAITH, INC	MA	3240892	cwhite	Approved	Check	Paid	06/23/09	$5,000.00
WORCESTER LATINO DOLLARS FOR SCHOLARS	MA	2939914	cwhite	Approved	Check	Paid	10/05/09	$3,000 00
WORCESTER PUBLIC LIBRARY FOUNDATION	MA	3393968	cwhite	Approved	Check	Paid	09/21/09	$15,000 00
WORCESTER REGIONAL RESEARCH BUREAU, INC.	MA	3038016	cwhite	Approved	Check	Paid	06/23/09	$9,000.00
WORCESTER ROOTS PROJECT	MA	3759353	cwhite	Pending	Check	Paid	12/17/09	$2,000 00
WORCESTER STATE FOUNDATION, INC	MA	2490737	cwhite	Approved	Check	Paid	12/17/09	$50,000.00
WORCESTER TECHNICAL HIGH SCHOOL	MA	3345388	cwhite	Approved	Check	Paid	09/21/09	$100,000.00
WORCESTER YOUTH CENTER, INC	MA	3403104	cwhite	Approved	Check	Paid	12/17/09	$12,500.00
Y O.U., INC	MA	3740701	cwhite	Approved	Check	Paid	12/17/09	$30,000.00
YMCA OF CENTRAL MASSACHUSETTS	MA	3740690	cwhite	Approved	Check	Paid	12/17/09	$10,000.00
YOUTHNET WORCESTER	MA	2977882	cwhite	Approved	Check	Paid	03/23/09	$10,000 00

* Indicates that Check Date is null and is therefore based on Requested Check Date
Data contained in this report is for management reporting only and should not be used for financial purposes
Not for disclosure outside of FTW Acting as Administrator for unless by written authorization

FTW Acting as Administrator for

Stoddard Grant Payments Made in 2009

Stoddard Charitable Trust

Organization Name	State/Province	Request ID	Owner	Disposition	Payment Type	Payment Status	Check Date*	Payment Amount
YOUTHNET WORCESTER	MA	3276551	cwhite	Approved	Check	Paid	06/23/09	$10,000.00
					Stoddard Charitable Trust Count:	**75**	**Total:**	**$2,710,814.00**
					Report Count:	**75**	**Total:**	**$2,710,814.00**

01/12/10 02 54 38

* Indicates that Check Date is null and is therefore based on Requested Check Date
Data contained in this report is for management reporting only and should not be used for financial purposes
Not for disclosure outside of FTW Acting as Administrator for unless by written authorization.

2009 Tax Inforr. .tion Statement

Account Number: 37567510
Recipient's Tax ID number: 04-6023791
Payer's Federal ID number: 26-3619428

☐ Corrected ☐ 2nd TIN notice

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

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 (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
567.0000	906548813	UNION ELEC CO PFD $5.50 A	10/07/2009	11/09/2009	53,013.14	50,463.00	2,550.14	0.00
431.0000	906548813	UNION ELEC CO PFD $5.50 A	01/12/2009	11/09/2009	40,297.46	42,884.50	-2,587.04	0 00
626.0000	92780430	VIRGINIA ELEC & PWR CO PFD $4.12	01/27/2009	05/27/2009	50,391.70	50,080.00	311.70	0.00
.7810	92904210	VORNADO REALTY TRUST	03/12/2009	03/16/2009	28.52	25.05	3.47	0.00
440.0000	93883720	WASHINGTON GAS & LT CO PFD 4.25%	07/06/2009	07/17/2009	31,283.19	31,245.95	37.24	0.00
803.0000	93883750	WASHINGTON GAS LT CO PFD $4.80	12/10/2008	01/12/2009	65,042.63	64,240.00	802.63	0.00
5000.0000	93883750	WASHINGTON GAS LT CO PFD $4.80	01/16/2009	01/28/2009	374,997.90	365,000.00	9,997.90	0.00
720.0000	95709T40	WESTAR ENERGY INC PFD 5%	05/13/2009	06/08/2009	56,878.53	56,592.00	286.53	0 00
2100.0000	98389B60	XCEL ENERGY INC PFD SER E $4.16	11/28/2008	01/27/2009	154,349.13	134,925.00	19,424.13	0 00
Total Short Term Sales Reported on 1099-B					**4,249,732.06**	**3,695,385.95**	**554,346.11**	**0.00**
Long Term 15% Sales Reported on 1099-B								
.7060	02503Y10	AMERICAN CAPITAL LTD	02/21/2006	08/12/2009	2.10	20.49	-18.39	0.00
13500.0000	02503Y10	AMERICAN CAPITAL LTD	02/21/2006	08/20/2009	37,915.11	391,752.06	-353,836.95	0.00
750.0000	02687478	AMERICAN INTL GROUP INC COM	VARIOUS	08/20/2009	20,564.46	944,286.00	-923,721 54	0.00
12000.0000	060505559	BANK OF AMERICA 8.625% MAT 05/28/2013 PREFERRED SER MER	04/22/2008	11/16/2009	281,392.76	300,000.00	-18,607.24	0.00
1000.0000	194162103	COLGATE PALMOLIVE	03/20/1991	10/30/2009	79,917.94	9,486.49	70,431.45	0.00
1100.0000	194162103	COLGATE PALMOLIVE	03/20/1991	11/09/2009	88,152.72	10,435.14	77,717.58	0.00

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2009 Tax Inforr. .tion Statement

Account Number: 37567510
Recipient's Tax ID number: 04-6023791
Payer's Federal ID number: 26-3619428

☐ Corrected ☐ 2nd TIN notice

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

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 (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
300000.0000	2338E8VG	DAIMLERCHRYSLER NORTH AMER HLDG DTD 10/07/2004 4% 10/15/2009	10/04/2004	10/15/2009	300,000.00	300,000.00	0.00	0.00
905.0000	240019208	DAYTON PWR & LT CO PFD SER A 3.75%	08/07/2008	11/10/2009	65,248.82	65,160.00	88.82	0.00
2000.0000	34537085	FORD MTR CO DEL NT 7.5% PFD	02/14/2007	08/06/2009	39,898.97	39,800.00	98.97	0 00
2200.0000	34537085	FORD MTR CO DEL NT 7.5% PFD	02/14/2007	08/07/2009	43,888.87	43,780.00	108.87	0 00
64000.0000	37373710	GERDAU SA-SPONSORED ADR	05/18/2005	09/25/2009	841,523.16	197,785.60	643,737.56	0.00
21400.0000	44106M10	HOSPITALITY PROPERTIES TRUST	VARIOUS	08/20/2009	364,483.94	626,259.61	-261,775.67	0.00
16000.0000	45683710	ING GROEP NV-SPONSORED ADR	VARIOUS	09/25/2009	264,045.99	496,816.25	-232,770.26	0.00
300000.0000	459200AT	INTERNATIONAL BUSINESS MACHINES DTD 02/01/1999 5.375% 02/01/2009	09/29/2004	02/03/2009	300,000.00	300,000.00	0.00	0.00
14000.0000	58047P10	MCG CAPITAL CORP	05/31/2007	08/20/2009	39,127.58	249,309.20	-210,181.62	0.00
10000.0000	71654V408	PETROLEO BRASILEIRO SA PETROBRAS	09/22/2004	10/21/2009	509,928.87	87,385.50	422,543.37	0.00
5000.0000	71654V40	PETROLEO BRASILEIRO SA-ADR	09/22/2004	08/25/2009	216,447.42	43,692.75	172,754.67	0.00
19000.0000	71654V40	PETROLEO BRASILEIRO SA-ADR	09/22/2004	09/28/2009	854,269.30	166,032.45	688,236.85	0.00
300000.0000	717081AP	PFIZER INC DTD 02/19/2003 3.3% 03/02/2009	09/29/2004	03/03/2009	300,000.00	299,649.00	351.00	0.00
18000.0000	74021511	PRECISION DRILLING TR RIGHTS EXP 06/03/2009	10/13/2006	06/26/2009	0.00	0.00	0.00	0.00
8500.0000	74922710	RAIT FINANCIAL TRUST	05/31/2007	09/25/2009	23,629.38	250,452.50	-226,823.12	0.00
330.0000	817315104	SEPRACOR INC COM	03/21/2000	11/18/2009	7,590.00	30,005.02	-22,415.02	0.00

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2009 Tax Inforn..tion Statement

Account Number: 37567510
Recipient's Tax ID number: 04-6023791
Payer's Federal ID number: 26-3619428

☐ **Corrected** ☐ **2nd TIN notice**

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

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 (Box 1a)	Stocks Bonds, etc (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
30.0000	817315104	SEPRACOR INC COM	03/21/2000	11/18/2009	690.00	2,720.75	-2,030.75	0.00
.4890	828806109	SIMON PPTY GROUP INC NEW COM	11/16/2004	12/21/2009	38.64	30.11	8.53	0.00
.2640	82880610	SIMON PROPERTY GROUP INC	11/16/2004	03/31/2009	8.75	15.88	-7.13	0.00
.5420	82880610	SIMON PROPERTY GROUP INC	11/16/2004	06/24/2009	27.28	32.60	-5.32	0.00
.9020	82880610	SIMON PROPERTY GROUP INC	11/16/2004	09/28/2009	62.75	53.88	8.87	0.00
13000.0000	84265V105	SOUTHERN COPPER CORP	07/13/2005	10/21/2009	468,800.42	101,904.62	366,895.80	0.00
.5000	92240M108	VECTOR GROUP LTD	11/28/2007	10/20/2009	7.42	10.00	-2.58	0.00
.2540	92904210	VORNADO REALTY TRUST	07/12/2002	06/12/2009	11.77	10.21	1.56	0.00
.2950	92904210	VORNADO REALTY TRUST	07/12/2002	09/17/2009	19.70	11.81	7.89	0.00
.8200	929042109	VORNADO RLTY TR COM	07/12/2002	12/21/2009	56.97	32.97	24.00	0.00
10000.0000	96216610	WEYERHAEUSER CO	03/27/2008	09/25/2009	369,548.48	650,767.00	-281,218.52	0.00
1500.0000	98389B60	XCEL ENERGY INC PFD SER E $4.16	03/13/2007	01/27/2009	110,249.38	127,875.00	-17,625.62	0.00
Total Long Term 15% Sales Reported on 1099-B					**5,627,548.95**	**5,735,572.89**	**-108,023.94**	**0.00**

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

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 STODDARD CHARITABLE TRUST	Employer identification number 04-6023791
	Number, street, and room or suite no. If a P.O. box, see instructions. 370 MAIN STREET 12TH FLOOR	For IRS use only
	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 [X] 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.

- The books are in the care of ▶ FLETCHER TILTON & WHIPPLE, P. C. 370 MAIN STREET 12TH FLOOR - WORCESTER, MA 01608-1779

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 PREPARE 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	$ 51,035.
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	$ 81,643.
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 ▶ Sandra Zdonczyk Title ▶ EA Date ▶ 7-30-10

923832
05-26-09

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

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- 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: STODDARD CHARITABLE TRUST	Employer identification number: 04-6023791
Number, street, and room or suite no. If a P.O. box, see instructions. 370 MAIN STREET 12TH FLOOR	For IRS use only
City, town or post office, state, and ZIP code. For a foreign address, see instructions. WORCESTER, MA 01608-1779	

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[ ] 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 [X] Form 990-PF [ ] Form 990-T (trust other than above) [ ] Form 4720 [ ] Form 6069

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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.

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Signature and Verification

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Signature ▶ Sandra Zdonczyk Title ▶ EA Date ▶ 7-30-10

923832
05-26-09