



See a Social Security Number? Say Something!  
Report Privacy Problems to <https://public.resource.org/privacy>  
Or call the IRS Identity Theft Hotline at 1-800-908-4490



## Return of Private Foundation

OMB No 1545-0052

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

2009

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS  
label  
Otherwise,  
print  
or type  
See Specific  
Instructions.

Name of foundation

STEARNS CHARITABLE TRUST

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

ROPES &amp; GRAY LLP, ONE INTERNATIONAL PL

City or town, state, and ZIP code

BOSTON, MA 02110-2624

A Employer identification number

04-6036697

B Telephone number

(617) 951-7000

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationI Fair market value of all assets at end of year  
(from Part II, col (c), line 16)

J Accounting method:

☒ Cash☐ Accrual☐ Other (specify)

\$ 6,472,564. (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 <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
	3 Interest on savings and temporary cash investments		1,056.			
	4 Dividends and interest from securities	202,765.	211,953.		STATEMENT 1	
	5a Gross rents					
	b Net rental income or (loss)					
	6a Net gain or (loss) from sale of assets not on line 10	248,539.				
	b Gross sales price for all assets on line 6a	4,407,626.				
	7 Capital gain net income (from Part IV, line 2)		248,539.			
	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						
12 Total Add lines 1 through 11	451,304.	461,548.				
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	12,000.	9,000.		3,000.	
	14 Other employee salaries and wages					
	15 Pension plans, employee benefits					
	16a Legal fees					
	b Accounting fees	STMT 2	5,358.	4,019.		1,339.
	c Other professional fees	STMT 3	56,268.	42,201.		14,067.
	17 Interest					
	18 Taxes	STMT 4	1,269.	2,856.		0.
	19 Depreciation and depletion					
	20 Occupancy					
	21 Travel, conferences, and meetings					
	22 Printing and publications					
	23 Other expenses	STMT 5	15.	0.		15.
	24 Total operating and administrative expenses Add lines 13 through 23		74,910.	58,076.		18,421.
	25 Contributions, gifts, grants paid		288,000.			288,000.
26 Total expenses and disbursements Add lines 24 and 25		362,910.	58,076.		306,421.	
27 Subtract line 26 from line 12.						
a Excess of revenue over expenses and disbursements		88,394.				
b Net investment income (if negative, enter -0-)			403,472.			
c Adjusted net income (if negative, enter -0-)				N/A		

923501  
02-02-10

LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions

Form 990-PF (2009)

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		141,497.	42,982.	42,982.
	2 Savings and temporary cash investments		702,213.	1,732,864.	1,732,864.
	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 6		1,780,891.	0.	0.
	b Investments - corporate stock STMT 7		3,017,877.	2,632,687.	3,022,844.
	c Investments - corporate bonds				
Liabilities	11 Investments - land, buildings, and equipment basis ▶				
	Less accumulated depreciation ▶				
	12 Investments - mortgage loans				
	13 Investments - other STMT 8		725,981.	1,675,697.	1,673,874.
	14 Land, buildings, and equipment basis ▶				
	Less accumulated depreciation ▶				
	15 Other assets (describe ▶)				
	16 Total assets (to be completed by all filers)		6,368,459.	6,084,230.	6,472,564.
	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ▶)				
	23 Total liabilities (add lines 17 through 22)		0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>				
	and complete lines 27 through 31				
	27 Capital stock, trust principal, or current funds		6,368,459.	6,084,230.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds		0.	0.	
	30 Total net assets or fund balances		6,368,459.	6,084,230.	
	31 Total liabilities and net assets/fund balances		6,368,459.	6,084,230.	

## 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	6,368,459.
2 Enter amount from Part I, line 27a	2	88,394.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	6,456,853.
5 Decreases not included in line 2 (itemize) ▶ BOOK VALUE/TAX COST ADJUSTMENT	5	372,623.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	6,084,230.

**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 <b>SEE ATTACHED STATEMENTS</b>			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e <b>4,407,626.</b>		<b>4,159,087.</b>	<b>248,539.</b>

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			<b>248,539.</b>

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	<b>248,539.</b>
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	<b>N/A</b>

**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	<b>356,709.</b>	<b>7,345,359.</b>	<b>.048563</b>
2007	<b>381,583.</b>	<b>8,250,299.</b>	<b>.046251</b>
2006	<b>378,783.</b>	<b>7,625,221.</b>	<b>.049675</b>
2005	<b>390,293.</b>	<b>7,406,041.</b>	<b>.052699</b>
2004	<b>386,221.</b>	<b>7,257,500.</b>	<b>.053217</b>

2 Total of line 1, column (d)	2	<b>.250405</b>
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	<b>.050081</b>
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	<b>5,938,182.</b>
5 Multiply line 4 by line 3	5	<b>297,390.</b>
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	<b>4,035.</b>
7 Add lines 5 and 6	7	<b>301,425.</b>
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions	8	<b>306,421.</b>

**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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	4,035.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> 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	4,035.
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	4,035.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		6a	3,120.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		6b	
6 Credits/Payments:		6c	5,500.
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6d		
b Exempt foreign organizations - tax withheld at source	7	8,620.	
c Tax paid with application for extension of time to file (Form 8868)	8		
d Backup withholding erroneously withheld	9		
7 Total credits and payments. Add lines 6a through 6d	10	4,585.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	11	0.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input checked="" type="checkbox"/> 4,585. Refunded <input checked="" type="checkbox"/>			

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

Form 990-PF (2009)

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► ROPES & GRAY LLP Telephone no. ► 617 951 7000 Located at ► ONE INTERNATIONAL PLACE, BOSTON, MA ZIP+4 ► 02110			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year		15	N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	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?	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009) N/A	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

Form 990-PF (2009)

**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

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
ANNE B JENCKS	TRUSTEE			
SEEKONK, MA	1.00	0.	0.	0.
RUSSELL BEEDE	TRUSTEE			
CONCORD, MA	1.00	12,000.	0.	0.
JAMES GASSEL	TRUSTEE			
SAN FRANCISCO, CA	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

Form 990-PF (2009)

**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 STEARNS CHARITABLE TRUST IS A PRIVATE FOUNDATION WHICH RECEIVES INVESTMENT INCOME AND DISTRIBUTES THAT INCOME TO PRESELECTED CHARITIES QUALIFYING UNDER IRC SEC 501 (C)(3).	18,421.
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.



**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	5,204,985.
b	Average of monthly cash balances	1b	823,626.
c	Fair market value of all other assets	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	6,028,611.
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	6,028,611.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	90,429.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,938,182.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	296,909.

**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	296,909.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	4,035.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	4,035.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	292,874.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	292,874.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	292,874.

**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	306,421.
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	306,421.
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	4,035.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	302,386.

**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.

Form 990-PF (2009)

**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				292,874.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			9,378.	
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: ▶ \$ 306,421.				
a Applied to 2008, but not more than line 2a			9,378.	
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				292,874.
e Remaining amount distributed out of corpus	4,169.			
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	4,169.			
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	0.			
9 Excess distributions carryover to 2010 Subtract lines 7 and 8 from line 6a	4,169.			
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	4,169.			

N/A

- ▶

☐ 4942(i)(3) or ☐ 4942(i)(5)

- (4) Gross investment income

[illegible]

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





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

<p><b>1</b> -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?</p> <p><b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of:</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p><b>b</b> Other transactions:</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p><b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p><b>d</b> 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.</p>		<b>Yes</b>	<b>No</b>
	<b>1a(1)</b>		<b>X</b>
	<b>1a(2)</b>		<b>X</b>
	<b>1b(1)</b>		<b>X</b>
	<b>1b(2)</b>		<b>X</b>
	<b>1b(3)</b>		<b>X</b>
	<b>1b(4)</b>		<b>X</b>
	<b>1b(5)</b>		<b>X</b>
	<b>1b(6)</b>		<b>X</b>
	<b>1c</b>		<b>X</b>

[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	<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"><i>Russell &amp; Beide</i></span> <span style="font-size: 1.2em;">9/15/10</span> </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <span>Signature of officer or trustee</span> <span>Date</span> </div>	<div style="border-bottom: 1px solid black; display: flex; justify-content: center;"> <span style="font-size: 1.2em;"><b>TRUSTEE</b></span> </div> <div style="text-align: center; font-size: 0.8em;">Title</div>	
	<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"><i>Joann W. Censullo</i></span> <span style="font-size: 1.2em;">8/16/10</span> </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <span>Preparer's signature</span> <span>Date</span> </div>	<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             Check if self-employed           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>	
Paid Preparer's Use Only	<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             Firm's name (or yours if self-employed), address, and ZIP code           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>		<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             EIN           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>
<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             Firm's name (or yours if self-employed), address, and ZIP code           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>		<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             EIN           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>	
<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             Firm's name (or yours if self-employed), address, and ZIP code           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>		<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             EIN           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>	
<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             Firm's name (or yours if self-employed), address, and ZIP code           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>		<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             EIN           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>	
<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             Firm's name (or yours if self-employed), address, and ZIP code           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>		<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             EIN           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>	
<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             Firm's name (or yours if self-employed), address, and ZIP code           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>		<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             EIN           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>	
<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             Firm's name (or yours if self-employed), address, and ZIP code           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>		<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             EIN           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>	
<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> <span style="font-size: 1.2em;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div>             Firm's name (or yours if self-employed), address, and ZIP code           </div> </span> <span style="font-size: 1.2em;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> <input type="checkbox"/> </div> </span> </div> <div style="font-size: 0.8em;">Preparer's identifying number</div>		<div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> </div>	

## STEARNS 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	150000 SHS FNMA 5.25% 1/15/09	P	01/23/02	01/15/09
b	375 SHS GENENTECH INC	P	VARIOUS	03/13/09
c	157.5 SHS RIO TINTO PLC SPNSD ADR	P	03/16/05	06/16/09
d	241.5 SHS RIO TINTO PLC SPNSD	P	03/16/05	06/16/09
e	231 SHS RIO TINTO PLC SPNSD	P	03/16/05	06/16/09
f	75000 SHS FNMA 5.375% 8/15/09	P	08/06/07	08/15/09
g	100000 SHS US TREASURY NTS 6% 8/15/09	P	04/18/00	08/15/09
h	1500 SHS CANADIAN NATL RAILWAY CO	P	01/22/03	09/02/09
i	900 SHS CISCO SYSTEMS INC	P	02/02/06	09/02/09
j	200 SHS DEVON ENERGY CORP	P	04/20/07	09/02/09
k	1325 SHS ELECTRONIC ARTS INC	P	10/27/05	09/02/09
l	525 SHS FPL GROUP INC	P	01/22/03	09/02/09
m	2075 SHS HALLIBURTON CO	P	VARIOUS	09/02/09
n	1150 SHS ISHARES RUSSELL	P	04/20/07	09/02/09
o	425 SHS MICROSOFT CORP	P	04/18/00	09/02/09

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 150,000.		150,512.	-512.
b 35,233.		15,389.	19,844.
c 1,710.		1,583.	127.
d 2,623.		2,428.	195.
e 2,509.		2,322.	187.
f 75,000.		75,834.	-834.
g 100,000.		98,688.	1,312.
h 70,054.		20,229.	49,825.
i 19,406.		16,621.	2,785.
j 12,255.		14,658.	-2,403.
k 24,101.		73,775.	-49,674.
l 29,162.		15,365.	13,797.
m 48,349.		67,636.	-19,287.
n 59,826.		99,347.	-39,521.
o 10,144.		16,922.	-6,778.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-512.
b			19,844.
c			127.
d			195.
e			187.
f			-834.
g			1,312.
h			49,825.
i			2,785.
j			-2,403.
k			-49,674.
l			13,797.
m			-19,287.
n			-39,521.
o			-6,778.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7  
If (loss), enter "-0-" in Part I, line 7 }

2

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

3

## STEARNS 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	1075 SHS PEPSICO INC	P	01/23/02	09/02/09
b	115 SHS POTASH CORP SASK INC	P	06/26/08	09/02/09
c	75 SHS RIO TINTO SPNSD ADR	P	03/16/05	09/02/09
d	850 SHS ROPER INDS INC NEW	P	11/13/06	09/02/09
e	200 SHS STATE STREET CORP	P	10/09/08	09/02/09
f	500 SHS VALE S.A. ADR	P	04/20/07	09/02/09
g	1000 SHS WOODSIDE PETROLEUM SPONS ADR	P	06/26/08	09/02/09
h	2525 SHS ABB LTD SPON ADR	P	10/09/08	12/29/09
i	775 SHS AT&T INC	P	VARIOUS	12/29/09
j	850 SHS ADOBE SYS INC	P	04/20/07	12/29/09
k	700 SHS ALLERGAN INC	P	10/01/07	12/29/09
l	1215 SHS CANADIAN NATL RAILWAY	P	01/22/03	12/29/09
m	1400 SHS CISCO SYSTEMS INC	P	02/02/06	12/29/09
n	6349.744 SHS DODGE & COX INTL STOCK FD	P	VARIOUS	12/29/09
o	1345 SHS EMC CORP MASS	P	04/20/07	12/29/09

(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	60,654.		53,299.	7,355.
b	10,184.		25,136.	-14,952.
c	11,360.		8,806.	2,554.
d	39,611.		41,829.	-2,218.
e	9,987.		8,995.	992.
f	9,675.		10,453.	-778.
g	39,229.		63,070.	-23,841.
h	48,435.		37,275.	11,160.
i	21,917.		30,855.	-8,938.
j	31,571.		35,875.	-4,304.
k	44,613.		46,187.	-1,574.
l	66,746.		16,385.	50,361.
m	33,659.		25,855.	7,804.
n	203,382.		238,171.	-34,789.
o	23,471.		20,807.	2,664.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			7,355.
b			-14,952.
c			2,554.
d			-2,218.
e			992.
f			-778.
g			-23,841.
h			11,160.
i			-8,938.
j			-4,304.
k			-1,574.
l			50,361.
m			7,804.
n			-34,789.
o			2,664.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7  
If (loss), enter "-0-" in Part I, line 7 }

2

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

3



## STEARNS 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	1200 SHS EMERSON ELEC CO	P	10/09/08	12/29/09
b	860 SHS EXELON CORP	P	11/13/06	12/29/09
c	935 SHS EXXON MOBIL CORP	P	08/21/85	12/29/09
d	615 SHS FPL GROUP INC	P	01/22/03	12/29/09
e	75000 SHS FHLB 5.125% 8/14/13	P	08/06/07	12/29/09
f	200000 SHS FHLMC 5.125% 7/15/12	P	04/25/07	12/29/09
g	150000 SHS FHLMC 4.5% 1/15/13	P	02/12/03	12/29/09
h	200000 SHS FNMA 4.125% 5/15/10	P	04/25/07	12/29/09
i	200000 SHS FNMA 5.125% 4/15/11	P	04/25/07	12/29/09
j	50000 SHS FNMA 4.625% 10/15/14	P	08/06/07	12/29/09
k	100000 SHS FNMA 4.25% 8/15/10	P	10/01/07	12/29/09
l	2000.710 SHS FRANKLIN TEMPLETON HARD	P	06/26/08	12/29/09
m	475 SHS GENZYME CORP	P	05/19/04	12/29/09
n	725 SHS GILEAD SCIENCES INC	P	10/01/07	12/29/09
o	50 SHS GOOGLE INC CL A	P	10/01/07	12/29/09

(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	52,058.		43,495.	8,563.
b	42,381.		50,921.	-8,540.
c	64,376.		6,028.	58,348.
d	32,799.		17,999.	14,800.
e	82,527.		74,994.	7,533.
f	217,224.		202,974.	14,250.
g	161,234.		151,313.	9,921.
h	202,474.		196,694.	5,780.
i	210,908.		202,557.	8,351.
j	53,965.		48,401.	5,564.
k	102,078.		99,448.	2,630.
l	19,167.		19,867.	-700.
m	23,750.		19,915.	3,835.
n	31,495.		30,218.	1,277.
o	31,003.		29,095.	1,908.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			8,563.
b			-8,540.
c			58,348.
d			14,800.
e			7,533.
f			14,250.
g			9,921.
h			5,780.
i			8,351.
j			5,564.
k			2,630.
l			-700.
m			3,835.
n			1,277.
o			1,908.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7  
If (loss), enter "-0-" in Part I, line 7 }

2

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):

If gain, also enter in Part I, line 8, column (c)

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

3

## STEARNS 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	205 SHS IBM CORP	P	01/23/02	12/29/09
b	3300 SHS ISHARES FTSE	P	VARIOUS	12/29/09
c	4317 SHS ISHARES MSCI EAFE INDEX FD	P	12/18/08	12/29/09
d	3072 SHS ISHARES RUSSELL MICAP	P	VARIOUS	12/29/09
e	555 SHS JP MORGAN CHASE & CO	P	06/26/08	12/29/09
f	1050 SHS MICROSOFT CORP	P	04/18/00	12/29/09
g	350 SHS NATIONAL OILWELL INC	P	04/20/07	12/29/09
h	1105 SHS ORACLE CORP	P	10/09/08	12/29/09
i	700 SHS PALL CORP	P	04/20/07	12/29/09
j	2235 SHS PEPSICO INC	P	VARIOUS	12/29/09
k	180 SHS PETROLEO BRASILEIRO S.A.	P	06/26/08	12/29/09
l	90 SHS POTASH CORP SASK INC	P	06/26/08	12/29/09
m	2370 SHS PROCTER & GAMBLE CO	P	12/31/03	12/29/09
n	115 SHS RIO TINTO PLC SPNSD ADR	P	03/16/05	12/29/09
o	1000 SHS ROCHE HLDG LTD SPONS ADR	P	10/01/07	12/29/09

(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	27,054.		22,208.	4,846.
b	138,579.		106,571.	32,008.
c	240,926.		191,630.	49,296.
d	115,027.		154,401.	-39,374.
e	23,106.		20,363.	2,743.
f	32,961.		41,807.	-8,846.
g	15,662.		13,865.	1,797.
h	27,506.		18,686.	8,820.
i	25,854.		28,259.	-2,405.
j	136,754.		103,939.	32,815.
k	8,608.		12,307.	-3,699.
l	9,769.		19,672.	-9,903.
m	146,083.		118,192.	27,891.
n	24,878.		13,502.	11,376.
o	42,889.		45,735.	-2,846.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			4,846.
b			32,008.
c			49,296.
d			-39,374.
e			2,743.
f			-8,846.
g			1,797.
h			8,820.
i			-2,405.
j			32,815.
k			-3,699.
l			-9,903.
m			27,891.
n			11,376.
o			-2,846.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7  
If (loss), enter "-0-" in Part I, line 7 }

2

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6).

If gain, also enter in Part I, line 8, column (c).

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

3

STEARNS 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 1265 SHS ROPER INDS INC NEW		P	11/13/06	12/29/09
b 1575 SHS SCHLUMBERGER LTD		P	VARIOUS	12/29/09
c 1000 SHS STATE STREET CORP		P	10/09/08	12/29/09
d 915 SHS SUNCOR ENERGY INC		P	03/28/77	12/29/09
e 685 SHS TEVA PHARMACEUTICAL INDS LTD ADR		P	04/20/07	12/29/09
f 100000 SHS US TREASURY NTS 5.75% 8/15/10		P	07/10/01	12/29/09
g 100000 SHS US TREASURY NTS 5% 2/15/11		P	06/28/01	12/29/09
h 5000 SHS US TREASURY NTS 4.875% 2/15/12		P	08/13/02	12/29/09
i 100000 SHS US TREASURY NTS 4.375% 8/15/12		P	08/27/02	12/29/09
j 565 SHS UNITED TECHNOLOGIES CORP		P	04/20/07	12/29/09
k 790 SHS VALE S.A. ADR		P	04/20/07	12/29/09
l 500 SHS WALGREEN CO		P	08/01/07	12/29/09
m 525 SHS ZIMMER HLDGS INC		P	10/01/07	12/29/09
n CAPITAL GAINS DIVIDENDS				
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 68,094.		62,251.	5,843.
b 102,619.		88,053.	14,566.
c 44,271.		44,977.	-706.
d 32,877.		23,844.	9,033.
e 38,033.		25,324.	12,709.
f 103,287.		103,510.	-223.
g 104,759.		97,969.	6,790.
h 53,825.		53,440.	385.
i 107,637.		100,900.	6,737.
j 39,724.		38,109.	1,615.
k 22,853.		16,515.	6,338.
l 18,555.		22,148.	-3,593.
m 31,546.		42,684.	-11,138.
n 1,585.			1,585.
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			5,843.
b			14,566.
c			-706.
d			9,033.
e			12,709.
f			-223.
g			6,790.
h			385.
i			6,737.
j			1,615.
k			6,338.
l			-3,593.
m			-11,138.
n			1,585.
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	248,539.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3	N/A

---



---

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
-------------	--	-----------	---

---

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DOMESTIC DIVIDENDS	93,721.	1,585.	92,136.
FOREIGN DIVIDENDS	12,167.	0.	12,167.
U S TREASURY OBLIGATIONS	98,462.	0.	98,462.
TOTAL TO FM 990-PF, PART I, LN 4	204,350.	1,585.	202,765.

---



---



---



---

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
-------------	-----------------	-----------	---

---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEE	5,358.	4,019.		1,339.
TO FORM 990-PF, PG 1, LN 16B	5,358.	4,019.		1,339.

---



---



---



---

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	3
-------------	-------------------------	-----------	---

---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ROPES & GRAY TRUSTEE FEES	56,268.	42,201.		14,067.
TO FORM 990-PF, PG 1, LN 16C	56,268.	42,201.		14,067.

---



---



---



---

FORM 990-PF	TAXES	STATEMENT	4
-------------	-------	-----------	---

---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX WITHHELD	1,269.	2,856.		0.
TO FORM 990-PF, PG 1, LN 18	1,269.	2,856.		0.

---



---

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BANK CHECKING FEES	15.	0.		15.	
TO FORM 990-PF, PG 1, LN 23	15.	0.		15.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	6
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
U S TREASURY OBLIGATIONS	X		0.	0.	
TOTAL U.S. GOVERNMENT OBLIGATIONS					
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS					
TOTAL TO FORM 990-PF, PART II, LINE 10A			0.	0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	7
DESCRIPTION			BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCKS - SEE ATTACHED			2,632,687.	3,022,844.
TOTAL TO FORM 990-PF, PART II, LINE 10B			2,632,687.	3,022,844.

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	8
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
MUTUAL FUNDS EQUITIES - SEE ATTACHED	COST	1,614,905.	1,607,547.	
PIMCO COMMODITY RR STRAT	COST	60,792.	66,327.	
TOTAL TO FORM 990-PF, PART II, LINE 13		1,675,697.	1,673,874.	

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 9

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
2ND STORY THEATRE	NONE GENERAL PURPOSE	CHARITY	1,000.
ACLU	NONE GENERAL PURPOSE	CHARITY	2,000.
ALZHEIMER'S ASSOCIATION	NONE GENERAL PURPOSE	CHARITY	1,000.
ART INSTITUTE OF CHICAGO	NONE GENERAL PURPOSE	CHARITY	3,000.
AUDUBON SOCIETY	NONE GENERAL PURPOSE	CHARITY	5,000.
BEAVER COUNTRY DAY SCHOOL	NONE GENERAL PURPOSE	CHARITY	500.
BOSTON SYMPHONY ORCHESTRA	NONE GENERAL PURPOSE	CHARITY	2,000.
BROWN UNIVERSITY	NONE GENERAL PURPOSE	CHARITY	2,500.

STEARNS CHARITABLE TRUST

04-6036697

BROWN UNIVERSITY ANNUAL FUND	NONE GENERAL PURPOSE	CHARITY	1,000.
CA PACIFIC MEDICAL CENTER	NONE GENERAL PURPOSE	CHARITY	5,000.
CHICAGO BOTANICAL GARDENS	NONE GENERAL PURPOSE	CHARITY	6,000.
CHICAGO HUMANITIES FESTIVAL	NONE GENERAL PURPOSE	CHARITY	9,000.
CHICAGO SYMPHONY ORCHESTRA	NONE GENERAL PURPOSE	CHARITY	5,000.
CHILDRENS FRIEND AND SERVICE	NONE GENERAL PURPOSE	CHARITY	1,000.
CHURCH OF THE EPIPHANY	NONE GENERAL PURPOSE	CHARITY	4,000.
COMMUNITY MUSIC WORKS	NONE GENERAL PURPOSE	CHARITY	1,500.
COMPASS COMMUNITY SERVICES	NONE GENERAL PURPOSE	CHARITY	12,000.
CONCORD ART ASSOCIATION	NONE GENERAL PURPOSE	CHARITY	20,000.

STEARNS CHARITABLE TRUST

04-6036697

CONCORD FREE PUBLIC LIBRARY	NONE GENERAL PURPOSE	CHARITY	2,000.
CONCORD LAND CONSERVATION TRUST	NONE GENERAL PURPOSE	CHARITY	1,000.
CONCORD MUSEUM	NONE GENERAL PURPOSE	CHARITY	1,000.
DELAWARE RIVER KEEPER	NONE GENERAL PURPOSE	CHARITY	2,500.
DODGE YMCA	NONE GENERAL PURPOSE	CHARITY	3,000.
EARLY MUSIC AMERICA	NONE GENERAL PURPOSE	CHARITY	5,000.
EMERSON HEALTH CARE FOUNDATION INC	NONE GENERAL PURPOSE	CHARITY	5,000.
EVERGREEN SCHOOL	NONE GENERAL PURPOSE	CHARITY	2,000.
HANDEL AND HAYDN SOCIETY	NONE GENERAL PURPOSE	CHARITY	5,000.
HOSPICE OF ATTLEBORO	NONE GENERAL PUUPOSE	CHARITY	2,000.



STEARNS CHARITABLE TRUST04-6036697

LENDERS' FOR COMMUNITY DEVELOPMENT	NONE GENERAL PURPOSE	CHARITY	2,500.
LINCOLN SCHOOL	NONE GENERAL PURPOSE	CHARITY	1,000.
MA AUDUBON SOCIETY	NONE GENERAL PURPOSE	CHARITY	1,000.
MAINE SEA COAST MISSION (EDGE)	NONE GENERAL PURPOSE	CHARITY	2,000.
MAKE A WISH FOUNDATION	NONE GENERAL PURPOSE	CHARITY	5,000.
MELANOMA FOUNDATION OF NEW ENGLAND	NONE GENERAL PURPOSE	CHARITY	1,000.
MEMORIAL HOSPITAL OF RHODE ISLAND	NONE GENERAL PURPOSE	CHARITY	2,000.
MILTON ACADEMY	NONE GENERAL PURPOSE	CHARITY	1,000.
MOSES BROWN SCHOOL	NONE GENERAL PURPOSE	CHARITY	1,000.
MUSEUM OF FINE ARTS	NONE GENERAL PURPOSE	CHARITY	2,000.

STEARNS CHARITABLE TRUST

04-6036697

MUSEUM OF SCIENCE	NONE GENERAL PURPOSE	CHARITY	3,000.
NATIONAL BRAILLE PRESS	NONE GENERAL PURPOSE	CHARITY	2,000.
NATURE CONSERVANCY	NONE GENERAL PURPOSE	CHARITY	2,500.
NEW DESIGNS CHARTER SCHOOL - LA	NONE GENERAL PURPOSE	CHARITY	5,000.
NEW ENGLAND AQUARIUM	NONE GENERAL PURPOSE	CHARITY	4,000.
NEWBERRY LIBRARY	NONE GENERAL PURPOSE	CHARITY	5,000.
NORTHWESTERN HOSPITAL FOUND. ONCOLOGY CTR	NONE GENERAL PURPOSE	CHARITY	5,000.
ORG FOR THE ASSABET RIVER	NONE GENERAL PURPOSE	CHARITY	10,000.
OSSIPEE CHILDREN'S FOUNDATION	NONE GENERAL PURPOSE	CHARITY	5,000.
PENIKESE ISLAND SCHOOL	NONE GENERAL PURPOSE	CHARITY	1,000.

PLANNED PARENTHOOD OF RI	NONE GENERAL PURPOSE	CHARITY	5,000.
PROVIDENCE ATHENAEUM	NONE GENERAL PURPOSE	CHARITY	2,000.
REHOBOTH ANTIQUARIUM SOCIETY	NONE GENERAL PURPOSE	CHARITY	1,000.
RESTORATION PROJECT, INC.	NONE GENERAL PURPOSE	CHARITY	1,000.
RI PHILHARMONIC ORCHESTRA & MUSIC SCHOOL	NONE GENERAL PURPOSE	CHARITY	1,000.
RI PUBLIC RADIO	NONE GENERAL PURPOSE	CHARITY	1,000.
RI SCHOOL OF DESIGN	NONE GENERAL PURPOSE	CHARITY	1,000.
RI TUTORIAL	NONE GENERAL PURPOSE	CHARITY	1,000.
SAN FRANCISCO SYMPHONY	NONE GENERAL PURPOSE	CHARITY	5,000.
SAVE OUR HERITAGE (BARRETT FARM)	NONE GENERAL PURPOSE	CHARITY	10,000.

STEARNS CHARITABLE TRUST04-6036697

SAVE THE BAY	NONE GENERAL PURPOSE	CHARITY	1,000.
SEATTLE SCORES	NONE GENERAL PURPOSE	CHARITY	500.
SEEKONK LAND TRUST	NONE GENERAL PURPOSE	CHARITY	10,000.
SEEKONK PUBLIC LIBRARY TRUST	NONE GENERAL PURPOSE	CHARITY	1,000.
SLATER MILL	NONE GENERAL PURPOSE	CHARITY	3,000.
SMITH COLLEGE ALUMNAE FUND	NONE GENERAL PURPOSE	CHARITY	1,000.
ST. MARTINS CHURCH (PROV.,RI)	NONE GENERAL PURPOSE	CHARITY	1,000.
ST. PAUL SCHOOL	NONE GENERAL PURPOSE	CHARITY	2,500.
STRIVE BOSTON EMP SVC INC	NONE GENERAL PURPOSE	CHARITY	1,000.
SUDBURY VALLEY TRUSTEES	NONE GENERAL PURPOSE	CHARITY	5,000.

STEARNS CHARITABLE TRUST04-6036697

TREEHOUSE (SEATTLE)	NONE GENERAL PURPOSE	CHARITY	500.
TRINITY REPERTORY THEATRE	NONE GENERAL PURPOSE	CHARITY	1,000.
TRUSTEES OF RESERVATIONS	NONE GENERAL PURPOSE	CHARITY	5,000.
UNIVERSITY PREP (SEATTLE)	NONE GENERAL PURPOSE	CHARITY	2,000.
URBAN COLLAB. ACCELERATED PROGRAM	NONE GENERAL PURPOSE	CHARITY	20,000.
WESTPORT LAND CONSERVATION TRUST	NONE GENERAL PURPOSE	CHARITY	7,000.
WESTPORT RIVER WATERSHED ALLIANCE	NONE GENERAL PURPOSE	CHARITY	5,500.
WGBH CHANNEL 2	NONE GENERAL PURPOSE	CHARITY	6,000.
WHEATON ANNUAL FUND	NONE GENERAL PURPOSE	CHARITY	5,000.
WILLIAMS COLLEGE	NONE GENERAL PURPOSE	CHARITY	1,000.

STEARNS CHARITABLE TRUST04-6036697

WISSAHICKON WATERSHED ASSOCIATION	NONE GENERAL PURPOSE	CHARITY	2,500.
WRNI	NONE GENERAL PURPOSE	CHARITY	1,500.
YMCA - NEWMAN	NONE GENERAL PURPOSE	CHARITY	1,000.
YOUTH CARE (SEATTLE)	NONE GENERAL PURPOSE	CHARITY	5,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3A			<u>288,000.</u>

**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No. 1545-1709

► File a separate application for each return.

- If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box ☒ **X**
- If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits.

Type or print  File by the due date for filing your return. See instructions.	Name of Exempt Organization	Employer identification number
	<b>STEARNS CHARITABLE TRUST</b>	<b>04-6036697</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>ROPES &amp; GRAY LLP, ONE INTERNATIONAL PL</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>BOSTON, MA 02110-2624</b>	

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

- |   |   |                                    |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

**ROPES & GRAY LLP**

- The books are in the care of ►
- ONE INTERNATIONAL PLACE - BOSTON, MA 02110**

Telephone No ► **617 951 7000**

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 will cover

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for.

► ☒ calendar year **2009** or► ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_.

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

<b>3a</b> 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.	<b>3a</b>	\$	<b>0.</b>
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	<b>0.</b>
<b>c</b> <b>Balance Due.</b> Subtract line 3b from line 3a. 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.	<b>3c</b>	\$	<b>5500.</b>

Pd by Federal Tax Deposit Coupon  
Form 8879**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form 8868 (Rev. 4-2009)

- 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).

<b>Part II</b>		<b>Additional (Not Automatic) 3-Month Extension of Time.</b> 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
	STEARNS CHARITABLE TRUST		04-6036697
	Number, street, and room or suite no. If a P.O. box, see instructions		For IRS use only
	ROPES & GRAY LLP, ONE INTERNATIONAL PL		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
	BOSTON, MA 02110-2624		

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.****ROPES & GRAY LLP**

- The books are in the care of **▶ ONE INTERNATIONAL PLACE - BOSTON, MA 02110**  
Telephone No **▶ 617 951 7000** 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 OBTAIN ALL NECESSARY INFORMATION IN ORDER TO PREPARE A COMPLETE AND ACCURATE 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	\$	8,180.
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	\$	8,620.
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 **▶ [Signature]** Title **▶ 00087756 E.A.** Date **▶ 8/9/10**

Form 8868 (Rev. 4-2009)