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Return of Private Foundation

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 change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation William E Schrafft & Bertha E Schrafft Charitable Trust		A Employer identification number 04-6065605
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite P.O. Box 961449		B Telephone number 617 469-2271
	City or town, state, and ZIP code Boston, MA 02196		C If exemption application is pending, check here <input type="checkbox"/>
	H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 29,836,164. (Part I, column (d) must be on cash basis.)		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		7,611.	7,611.		Statement 1
4 Dividends and interest from securities		714,803.	714,803.		Statement 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		-355,298.			
b Gross sales price for all assets on line 6a 4,712,485.					
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		367,116.	722,414.		
13 Compensation of officers, directors, trustees, etc.		60,000.	9,600.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees Stmt 3		7,200.	0.		0.
c Other professional fees Stmt 4		108,578.	108,578.		0.
17 Interest					
18 Taxes Stmt 5		14,344.	0.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses Stmt 6		28,254.	0.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		218,376.	118,178.		0.
25 Contributions, gifts, grants paid		1,362,000.			1,362,000.
26 Total expenses and disbursements. Add lines 24 and 25		1,580,376.	118,178.		1,362,000.
27 Subtract line 26 from line 12		-1,213,260.			
a Excess of revenue over expenses and disbursements			604,236.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

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Charitable Trust**

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Part II Balance Sheets <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	3,975,663.	440,139.	440,139.
	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	21,176,325.	29,396,025.	29,396,025.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	25,151,988.	29,836,164.	29,836,164.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ Statement 9)	0.	14,094.	
23 Total liabilities (add lines 17 through 22)	0.	14,094.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	25,151,988.	29,822,070.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
30 Total net assets or fund balances	25,151,988.	29,822,070.		
31 Total liabilities and net assets/fund balances	25,151,988.	29,836,164.		

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	25,151,988.
2 Enter amount from Part I, line 27a	2	-1,213,260.
3 Other increases not included in line 2 (itemize) ▶ See Statement 7	3	5,883,342.
4 Add lines 1, 2, and 3	4	29,822,070.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	29,822,070.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Publicly Traded Securities	P		
b Capital Gains Dividends			
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 4,710,708.		5,067,783.	-357,075.
b 1,777.			1,777.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-357,075.
b			1,777.
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-355,298.
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	1,628,500.	31,242,044.	.052125
2007	1,958,890.	35,950,062.	.054489
2006	1,797,929.	33,820,166.	.053161
2005	1,634,005.	31,858,673.	.051289
2004	1,535,547.	30,554,517.	.050256

2 Total of line 1, column (d)	2	.261320
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	.052264
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	27,425,616.
5 Multiply line 4 by line 3	5	1,433,372.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,042.
7 Add lines 5 and 6	7	1,439,414.
8 Enter qualifying distributions from Part XII, line 4	8	1,362,000.

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 <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		
b. Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	12,085.
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	12,085.
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	12,085.
6. Credits/Payments		
a. 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	39,947.
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	39,947.
8. Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9. Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10. Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	27,862.
11. Enter the amount of line 10 to be Credited to 2010 estimated tax <input type="checkbox"/> 27,862. Refunded <input type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a. During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
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 type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e. Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2. Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	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?	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) <input type="checkbox"/> MA		
b. If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>schrafftcharitable.org</u>	13	X	
14	The books are in care of ► <u>Shabshtelowitz & Co., CPA's</u> Telephone no ► <u>508-672-2182</u> Located at ► <u>263 Walnut Street, P.O. Box 687, Fall River, MA</u> ZIP+4 ► <u>02722</u>			
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 type="checkbox"/> Yes <input checked="" 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	N/A	1b
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
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
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

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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

N/A

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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
Arthur Parker P.O. Box 961449 Boston, MA 02196	Trustee 5.00	15,000.	0.	0.
Lavinia B. Chase P.O. Box 961449 Boston, MA 02196	Trustee 3.00	13,000.	0.	0.
Kristen J. McCormack P.O. Box 961449 Boston, MA 02196	Trustee 3.00	13,000.	0.	0.
Karen Faulkner P.O. Box 961449 Boston, MA 02196	Executive Director 6.00	19,000.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

0

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Part 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	25,861,044.
b	Average of monthly cash balances	1b	1,982,221.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	27,843,265.
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	27,843,265.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	417,649.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	27,425,616.
6	Minimum investment return. Enter 5% of line 5	6	1,371,281.

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	1,371,281.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	12,085.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	12,085.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,359,196.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,359,196.
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	1,359,196.

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	1,362,000.
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	1,362,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,362,000.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				1,359,196.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007	156,761.			
e From 2008	87,032.			
f Total of lines 3a through e	243,793.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 1,362,000.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				1,359,196.
e Remaining amount distributed out of corpus	2,804.			
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	246,597.			
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	246,597.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007	156,761.			
d Excess from 2008	87,032.			
e Excess from 2009	2,804.			

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)

- 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

[illegible]

- 3 Subtract line 2c from line 2b.
 - a 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**

Karen Faulkner c/o Schrafft Charitable Trust, 617-357-5101
P.O. Box 961449, Boston, MA 02196

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

Please See www.schrafftcharitable.org

- c Any submission deadlines**

None

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

Generally, must be a Massachusetts tax exempt organization in existence for at least three years.

William E Schrafft & Bertha E Schrafft
Charitable Trust

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 Statement 10				
Total			3a	1,362,000.
b Approved for future payment				
None				
Total			3b	0.

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. | | |

[illegible]

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

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

Sign Here

Signature of officer or trustee

Date _____

Trustee
Title

Preparer's
signature

Date
05/24/10

Check if self-employed ☒

Preparer's identifying number

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

Shabshelowitz & Co, CPA's
263 Walnut Street
Fall River, Massachusetts 02720

EIN ►

Phone no 508-672-2182

Form **990-PF** (2009)

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	Amount
Bank of America	7,611.
Total to Form 990-PF, Part I, line 3, Column A	7,611.

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
Interest and Dividends from Securities	714,803.	0.	714,803.
Mutual Fund Distributions	1,777.	1,777.	0.
Total to Fm 990-PF, Part I, ln 4	716,580.	1,777.	714,803.

Form 990-PF Accounting Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Accounting	7,200.	0.		0.
To Form 990-PF, Pg 1, ln 16b	7,200.	0.		0.

Form 990-PF Other Professional Fees Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Investment Fees	108,578.	108,578.		0.
To Form 990-PF, Pg 1, ln 16c	108,578.	108,578.		0.

Form 990-PF	Taxes			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Increase in Deferred Taxes	14,094.	0.		0.	
MA Filing Fee	250.	0.		0.	
To Form 990-PF, Pg 1, ln 18	14,344.	0.		0.	

Form 990-PF	Other Expenses			Statement	6
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Grants Management	10,447.	0.		0.	
Membership Dues	14,045.	0.		0.	
Office and Misc.	3,762.	0.		0.	
To Form 990-PF, Pg 1, ln 23	28,254.	0.		0.	

Form 990-PF	Other Increases in Net Assets or Fund Balances	Statement	7
Description		Amount	
Revaluation of Securities to Market Value		5,883,342.	
Total to Form 990-PF, Part III, line 3		5,883,342.	

Form 990-PF	Corporate Stock		Statement	8
Description	Book Value	Fair Market Value		
7900 Abbott Laboratories	426,521.	426,521.		
1600 Air Prod & Chemical Inc	129,696.	129,696.		
800 Apple Inc	168,586.	168,586.		
1000 Autodesk Inc	25,410.	25,410.		
7000 Axis Capital Holdings	198,870.	198,870.		
5500 BP Plc Ads	318,835.	318,835.		
1500 Bard CR Inc	116,850.	116,850.		

3200 Baxter Int'l	187,776.	187,776.
8000 Brookfield Asset Mgmt	177,440.	177,440.
2000 CH Robinson	117,460.	117,460.
4000 Cisco Systems	95,760.	95,760.
1000 Caterpillar Inc	56,990.	56,990.
1500 Celgene Corp	83,520.	83,520.
2000 Chevron Corp	153,980.	153,980.
3600 Conocophillips	183,852.	183,852.
3800 Danaher Corp	285,760.	285,760.
3200 Dentsply Int'l Inc.	112,544.	112,544.
1500 Devon Energy Corp	110,250.	110,250.
5400 Double Eagle Pete	23,328.	23,328.
3800 Dover Corp	158,118.	158,118.
6000 Eaton Vance Corp	182,460.	182,460.
4000 Encana Corp	129,560.	129,560.
3000 Enstar Group Ltd	219,060.	219,060.
1000 Exelon Corp	48,870.	48,870.
1000 Express Scripts Inc	86,420.	86,420.
5000 Exxon Mobil Corp	340,950.	340,950.
1000 Factset Resh Systems Inc	65,870.	65,870.
3300 Fluor Corp	148,632.	148,632.
2000 Gilead Sciences Inc	86,540.	86,540.
300 Google Inc-Cl A	185,994.	185,994.
5500 HCC Ins Holdings	153,835.	153,835.
3500 HSBC Hldgs PLC New GB	199,815.	199,815.
2000 Hewlett Packard	103,020.	103,020.
2750 Homefed Corp	67,375.	67,375.
1500 IHS Inc CL A	82,215.	82,215.
3000 Intuit Inc	92,190.	92,190.
5000 ISHR MSCI Emerging Mkt	207,500.	207,500.
4000 JP Morgan Chase	166,680.	166,680.
4000 Johnson & Johnson	257,640.	257,640.
3000 Kellogg Co.	159,600.	159,600.
5000 Kraft Food	135,900.	135,900.
1700 Laboratory Corp Amer Hldg	127,228.	127,228.
10500 Leucadia Nat'l Corp	249,795.	249,795.
55000 Level 3 Communications Inc	84,150.	84,150.
6100 Merck & Co.	222,894.	222,894.
1600 Metlife	56,560.	56,560.
8000 Metabolix Inc	88,400.	88,400.
6500 Microsoft	198,120.	198,120.
4000 Mirant Corp	61,080.	61,080.
8000 Molex Inc	153,040.	153,040.
1500 Monsanto	122,625.	122,625.
8700 Nalco Holdings Co	221,937.	221,937.
1500 Nike Inc	99,105.	99,105.
4700 Noble Corp	191,290.	191,290.
2000 Northern TR Corp	104,800.	104,800.
3200 Novartis AG-Sponsor ADR	174,176.	174,176.
2000 PNC Fin'l Serv Gr	105,580.	105,580.
4600 Pepsico	279,680.	279,680.
1400 Potash Corp Sask Inc	151,900.	151,900.
2300 Proctor & Gamble	139,449.	139,449.
4900 Qualcomm Inc.	226,674.	226,674.

6900 Roper Inds Inc New	361,353.	361,353.
1400.SPX Corporation	76,580.	76,580.
5200 Schlumberger Ltd	338,468.	338,468.
2000 St Jude Med Inc Com	73,560.	73,560.
2000 State Street Corp	87,080.	87,080.
2000 Teva Pharmaceutical Inds	112,360.	112,360.
2000 Union Pacific Corp	127,800.	127,800.
2500 United Technologies Corp	173,525.	173,525.
2000 Verizon Communications	66,260.	66,260.
1700 Visa Inc Cl A	148,682.	148,682.
4500 Waters Corp	278,820.	278,820.
7000 Wells Fargo & Co	188,930.	188,930.
6000 Williams Companies Inc	126,480.	126,480.
1500 Yum Brands Inc	52,455.	52,455.
42616.083 BNY Mellon Intl Fund	444,486.	444,486.
34894.385 Boston Co. Sm Cap Value	675,904.	675,904.
16672.242 Boston Co Small Cap Grow	743,749.	743,749.
3500 Ishares FTSE Xinhau HK	147,910.	147,910.
9500 Ishares S&P Gsci Commod	302,290.	302,290.
1500 Ishares S&P Latin Amer	71,685.	71,685.
4000 Ishr Msci Germany Index	89,760.	89,760.
157205.126 Mellon Emerging Mkts	1,601,920.	1,601,920.
449177.233 Mellon Large Cap Stock Fd	3,355,354.	3,355,354.
232620.846 Mellon Mid Cap Stock Fund	2,219,203.	2,219,203.
1000 Spdr S&P Emerging Latin	80,061.	80,061.
369834.314 Standish Mellon Fixed Inc	7,319,021.	7,319,021.
65511.892 Strategic Global Stock Fd	822,174.	822,174.
Total to Form 990-PF, Part II, line 10b	29,396,025.	29,396,025.

Form 990-PF	Other Liabilities	Statement	9
Description	BOY Amount	EOY Amount	
Deferred Federal Excise Taxes	0.	14,094.	
Total to Form 990-PF, Part II, line 22	0.	14,094.	

Form.990-PF

Grants and Contributions
Paid During the Year

Statement 10

Recipient Name and Address	Recipient Relationship and Purpose of Grant	Recipient Status	Amount
ACCESS 100 Boylston St., Lower Level Boston, MA 02116	None College & Financial Aid Advising Program	Public Charity	10,000.
American Scores New England 150 Mount Vernon St. Dorchester, MA 02125	None Youth Development Program	Public Charity	8,000.
Appalachian Mountain Club Five Joy St. Boston, MA 02108	None Youth Opportunities Program	Public Charity	5,000.
Artists for Humanity 100 West Second St. Boston, MA 02127	None Operating	Public Charity	15,000.
Associated Grant Makers 55 Court St., Ste 520 Boston, MA 02108	None Summer Program	Public Charity	80,000.
BELL 60 Clayton St. Dorchester, MA 02122	None Boys of Bell	Public Charity	10,000.
Benjamin Franklin Institute 41 Berkley St. Boston, MA 02116	None Scholarship	Public Charity	20,000.
Berklee College of Music 1140 Boylston St. MS-11401A Boston, MA 02215	None Scholarship	Public Charity	15,000.

Big Brothers & Big Sisters of Massachusetts 75 Federal St., 5th Fl Boston , MA 02110	None Operating	Public Charity	15,000.
Big Sister Association of Greater Boston 161 Massachusetts Ave. Boston, MA 02115	None Operating	Public Charity	20,000.
Bird Street Community Center 500 Columbia Rd. Dorchester, MA 02125	None Youth Workforce Development Program	Public Charity	17,000.
Black Ministerial Alliance of Greater Boston 2326R Washington St. Roxbury, MA 02119	None Victory Generation Out of School Program	Public Charity	8,000.
Boston Archdiocesan Choir School 29 Mount Auburn St. Cambridge , MA 02138	None Scholarship	Public Charity	15,000.
Boston Arts Academy 174 Ipswich St. Boston, MA 02215	None Operating	Public Charity	20,000.
Boston Ballet 19 Clarendon St. Boston, MA 02116	None City Dance	Public Charity	18,000.
Boston Center for the Arts 539 Tremont St. Boston, MA 02116	None Art Morpheus	Public Charity	2,500.
Boston Childrens' Chorus 112 Shawmut Ave., Ste B Boston , MA 02118	None Operating	Public Charity	15,000.
Boston Conservatory 8 The Fenway Boston , MA 02115	None Operating	Public Charity	5,000.

Boston Employment Service Inc. 651 Washington St. Dorchester, MA 02124	None Operating	Public Charity	8,000.
Boston Learning Center 200 Ashmont St. Boston, MA 02124	None Operating	Public Charity	12,000.
Boston Symphony Orchestra Syphony Hall Boston, MA 02115	None Days in the Arts	Public Charity	15,000.
Bottom Line Inc. 555 Armory St. Ste 2 Jamaica Plain, MA 02130	None Operating	Public Charity	12,000.
Boys & Girls Clubs of Boston 50 Congress St. Ste 730 Boston, MA 02109	None Operating	Public Charity	20,000.
Breakthrough Cambridge PO Box 381486 Cambridge, MA 02238	None Summer Academic Enrichment Program	Public Charity	20,000.
Bridge Over Troubled Waters 47 West St. Boston, MA 02111	None Education and Career Development Program	Public Charity	15,000.
Cambridge School Volunteers 459 Broadway Cambridge, MA 02138	None Operating	Public Charity	23,000.
Cantata Singers 161 First St. Ste 203 Cambridge, MA 02142	None Education Program	Public Charity	10,000.
Catholic Schools Foundation 260 Franklin St. Boston, MA 02110	None Inner-City Scholarship	Public Charity	18,000.

Citizens School Inc. 308 Congress St. Boston, MA 02210	None SEM Program	Public Charity	15,000.
City on a Hill Charter Public 320 Huntington Ave. Boston, MA 02115	None Tutorial Program	Public Charity	13,000.
City Sprouts 25 River St. Cambridge, MA 02139	None Summer Intern Program	Public Charity	7,000.
City Year 287 Columbus Ave. Boston, MA 02116	None Whole School, Whole Child Program	Public Charity	15,000.
Codman Academy Charter Public School 637 Washington St. Dorchester, MA 02124	None Arts Program	Public Charity	7,500.
Colonel Daniel Marr Boys & Girls Club 1135 Dorchester Ave. Dorchester, MA 02125	None Operating	Public Charity	10,000.
Commonwealth School 151 Commonwealth Ave. Boston, MA 02116	None Scholarship	Public Charity	20,000.
Community Art Center, Inc. 119 Windsor St. Cambridge, MA 02139	None Operating	Public Charity	4,000.
Community Charter School of Cambridge 245 Bent St. Cambridge, MA 02141	None College Applications Program	Public Charity	12,000.
Community Music Center of Boston 34 Warren Ave. Boston, MA 02116	None Intensive Study Program	Public Charity	10,000.

Dorchester Youth Collaborative 1514A Dorchester Ave. Dorchester, MA 02122	None Operating	Public Charity	15,000.
Earthen Vessels 170 Appleton St. Cambridge, MA 02138	None Education Empowerment Program	Public Charity	10,000.
East Boston Ecumenical Community Council 50 Meredian St. Ste B1 East Boston, MA 02128	None ASPIRE Program	Public Charity	15,000.
Elizabeth Seton Academy 2220 Dorchester Ave. Dorchester Lower Mills, MA 02124	None Operating	Public Charity	5,000.
Ephifany School Inc. 154 Centre St. Dorchester, MA 02124	None Operating	Public Charity	15,000.
Federated Dorcheester Neighborhood Houses, Inc. 18 Samoset Street Dorchester, MA 02124	None Art a la Carte	Public Charity	12,000.
Future Chefs 681 Main St. 2-4 Waltham , MA 02451	None Operating	Public Charity	2,500.
Generations Incorporated 25 Kingston St., 4th Fl Boston , MA 02111	None Classroom Literacy Program	Public Charity	12,000.
Gordon College 255 Grapevine Rd. Wenham , MA 01984	None Scholarship Programs	Public Charity	35,000.
Hale Reservation Inc. 80 Carby St. Westwood, MA 02090	None Great Explorations Program	Public Charity	5,000.

Haley House Bakery Cafe & Training Program 23 Dartmouth St. Boston, MA 02116	None Take Back the Kitchen	Public Charity	15,000.
Handel & Haydn Society 300 Massachusetts Ave. Boston, MA 02115	None Educational Outreach Program	Public Charity	15,000.
Hopefound 264 Huntington Ave. Boston, MA 02115	None Operating	Public Charity	2,500.
Hyde Square Task Force PO Box 301871 Jamaica Plain, MA 02130	None Women Engaged in Physical Activity	Public Charity	15,000.
Inquilinois Boricacas En Accion 405 Shawmut Ave. Boston, MA 02118	None Calique Youth Arts Initiative	Public Charity	12,000.
Institute of Contemporary Art Boston 100 Northern Ave. Boston, MA 02210	None Teen Education Program	Public Charity	5,000.
Isabella Stewart Gardner Museum 2 Palace Rd. Boston, MA 02115	None School Partnership Program	Public Charity	10,000.
JFY Networks 125 Tremont St. Boston, MA 02108	None Operating	Public Charity	20,000.
Jose Mateo Ballet Theatre 400 Harvard St. Cambridge, MA 02138	None Dance for the Commonwealth	Public Charity	8,000.
Lasell College 1844 Commonwealth Ave. Newton, MA 02466	None Scholarship	Public Charity	20,000.

Lesley University 29 Everett St. Cambridge, MA 02138	None Scholarship	Public Charity	15,000.
Longy School of Music One Follen St. Cambridge, MA 02138	None Scholarship Fund	Public Charity	15,000.
Many Hands Sustainability Center 411 Sheldon Road Barre, MA 01005	None Operating	Public Charity	2,500.
Mattapoisett Land Trust PO Box 31 Mattapoisett, MA 02739	None Operating	Public Charity	5,000.
Merrimack Valley Habitat 50 Island St. Lawrence, MA 01840	None Operating	Public Charity	7,500.
Mil Milagros Goulston c/o Goulston 400 Atlantic Ave. Boston, MA 02110	None Operating	Public Charity	2,500.
MIT 77 Massachusetts Ave. Cambridge, MA 02139	None STEM Program/Woodworking Shop	Public Charity	12,500.
Mother Caroline Academy & Education Center 515 Blue Hill Ave. Dorchester, MA 02121	None Enrichment Program	Public Charity	5,000.
Mount Saint Joseph Academy 617 Cambridge St. Boston, MA 02134	None Scholarship	Public Charity	10,000.
Museum of Fine Arts-Boston 465 Huntington Ave. Boston, MA 02115	None Teen Arts Council	Public Charity	5,000.

Neighborhood House Charter School 21 Queen St. Dorchester, MA 02122	None Creative Arts Program	Public Charity	30,000.
New Bedford Whaling Museum 18 Johnny Cake Hill New Bedford, MA 02740	None Museum Access for Boston Youth	Public Charity	18,000.
New England Aquarium Central Wharf Boston, MA 02110	None Education Programs	Public Charity	25,000.
Norman B. Leventhal Map Center 700 Boylston St. Boston, MA 02116	None Mapping the Amer Rev Curriculum Pilot Project	Public Charity	2,500.
North Bennet Street School 39 North Bennet St. Boston, MA 02113	None Scholarship	Public Charity	12,000.
North Cambridge Catholic High School Inc. 40 Norris St. Cambridge, MA 02140	None Scholarship	Public Charity	10,000.
Northeastern University 135 Richard's Hall Boston, MA 02115	None Balfour Program	Public Charity	25,000.
Old Sturbridge Inc. 1 Old Sturbridge Village Rd. Sturbridge, MA 01566	None History on the Road	Public Charity	17,000.
Perkins School for the Blind 175 North Beacon St. Watertown , MA 02472	None Girls in the City Course	Public Charity	5,000.
Planned Parenthood League of Massachusetts 1055 Commonwealth Ave. Boston , MA 02215	None Get Real Program	Public Charity	20,000.

Plimoth Plantation PO Bqx 1620 Plymouth, MA 02362	None Scholarship for School Programs	Public Charity	10,000.
Poor Peoples United 645 Boylston St. Boston, MA 02116	None Operating	Public Charity	2,500.
Project DEEP One Worrell St. Dorchester, MA 02122	None Operating	Public Charity	7,000.
Regis College 235 Wellesley St. Weston, MA 02493	None Scholarship	Public Charity	20,000.
Roxbury Preparatory Charter School 120 Fisher Ave. Roxbury, MA 02130	None After Prep Initiative	Public Charity	15,000.
Save the Harbor Save the Bay 212 Northern Ave Ste 304 West Boston, MA 02210	None Boston Harbor Program	Public Charity	15,000.
Simmons College 300 The Fenway Boston, MA 02115	None Scholarship	Public Charity	20,000.
Sociedad Latina 1530 Tremont St. Boston, MA 02120	None Music Club House	Public Charity	12,000.
South Boston Neighborhood House 521 East Seventh St. So Boston, MA 02127	None Adolescent Services Program	Public Charity	5,000.
SquashBusters 795 Columbus Ave. Roxbury Crossing, MA 02120	None Operating	Public Charity	5,000.

Strong Women Strong Girls 727 Atlantic Ave 3rd Fl Boston , MA 02110	None Operating	Public Charity	8,000.
Techmission Inc. 31 Torrey St. Ste 1 Boston , MA 02124	None Techmission	Public Charity	5,000.
TEEP 206 Clarendon St. Boston, MA 02116	None Operating	Public Charity	7,000.
Tenacity 367 Western Ave 2nd Fl Boston , MA 02135	None After School Excellence Program	Public Charity	10,000.
The City School 614 Columbia Rd Dorchester Lower Mills, MA 02125	None Operating	Public Charity	6,000.
The Food Project 10 Lewis St. Lincoln, MA 01773	None Youth Programs	Public Charity	10,000.
The Institute of Contemporary Art / Boston 100 Northern Ave. Boston, MA 02210	None Teen Education Program	Public Charity	10,000.
The Steppingstone Foundation 155 Federal St. Ste 800 Boston, MA 02110	None Steppingstone Academy	Public Charity	10,000.
Thompson Island Outward Bound PO Box 127 Boston , MA 02127	None Connections Program	Public Charity	10,000.
Trinity Boston Foundation 206 Clarendon St. Boston, MA 02116	None TEEP Program	Public Charity	8,000.

Trustees of Reservation Westport Land Trust PO Box 3975 Westport , MA 02790	None Operating	Public Charity	15,000.
Unitarian Universalist Urban Ministry 10 Putnam St. Roxbury Crossing, MA 02119	None Roxbury Youth Programs	Public Charity	10,000.
United Way of Massachusetts Bay 51 Sleeper St. Boston , MA 02110	None Emergency Fund	Public Charity	8,000.
USS Constitution Museum Box 1812 Boston , MA 02129	None Youth Programs	Public Charity	10,000.
Wheelock College 200 The Riverway Boston , MA 02118	None Scholarship	Public Charity	20,000.
Women's Express 80 Summer St, Ste 300 Boston , MA 02110	None SHOUT Teen Voices	Public Charity	20,000.
YMCA of Greater Boston 316 Huntington Ave. Boston , MA 02115	None Training	Public Charity	15,000.
Zumix 202 Maverick St. E. Boston , MA 02128	None Youth Programs	Public Charity	10,000.

Total to Form 990-PF, Part XV, line 3a

1,362,000.

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 ☒
- 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 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 William E Schrafft & Bertha E Schrafft Charitable Trust	Employer identification number 04-6065605
	Number, street, and room or suite no. If a P.O. box, see instructions. P.O. Box 961449	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. Boston, MA 02196	

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 |

Shabshelowitz & Co., CPA's

- The books are in the care of ► **263 Walnut Street, P.O. Box 687 - Fall River, MA 02722**
Telephone No. ► **508-672-2182** 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

3a 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.	3a	\$ 14,132.
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.	3b	\$ 39,947.
c Balance Due. 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.	3c	\$ 0.

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)