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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

OMB No 1545-0052

2009Department 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 ARBELLA INSURANCE GROUP CHARITABLE FOUNDATION, INC.		A Employer identification number 05-0613355
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number 617-951-4600
	101 ARCH STREET		
	City or town, state, and ZIP code BOSTON, MA 02110		
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			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 ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 14,360,759. (Part I, column (d) must be on cash basis)		J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)	
Revenue	1 Contributions, gifts, grants, etc., received					
	2 Check ☒ if the foundation is not required to attach Sch B					
	3 Interest on savings and temporary cash investments					
	4 Dividends and interest from securities	404,655.	404,655.		STATEMENT 1	
	5a Gross rents					
	b Net rental income or (loss)					
	6a Net gain or (loss) from sale of assets not on line 10	19,357.				
	b Gross sales price for all assets on line 6a	3,000,000.				
	7 Capital gain net income (from Part IV, line 2)		19,357.			
	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	424,012.	424,012.	0.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.	
	14 Other employee salaries and wages					
	15 Pension plans, employee benefits					
	16a Legal fees					
	b Accounting fees	STMT 2	20,410.	0.	0.	0.
	c Other professional fees					
	17 Interest					
	18 Taxes	STMT 3	4,297.	0.	0.	0.
	19 Depreciation and depletion					
	20 Occupancy					
	21 Travel, conferences, and meetings					
	22 Printing and publications					
	23 Other expenses	STMT 4	119,018.	0.	0.	0.
	24 Total operating and administrative expenses. Add lines 13 through 23		143,725.	0.	0.	0.
	25 Contributions, gifts, grants paid		1,131,244.			1,334,356.
26 Total expenses and disbursements. Add lines 24 and 25		1,274,969.	0.	0.	1,334,356.	
27 Subtract line 26 from line 12:						
a Excess of revenue over expenses and disbursements		-850,957.				
b Net investment income (if negative, enter -0-)			424,012.			
c Adjusted net income (if negative, enter -0-)				0.		

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Form 990-PF (2009)

**ARBELLA INSURANCE GROUP CHARITABLE
FOUNDATION, INC.**

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	495,284.	733,682.	733,682.	
	2 Savings and temporary cash investments				
	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 5	4,329,200.	1,729,428.	1,729,428.	
	b Investments - corporate stock				
	c Investments - corporate bonds STMT 6	1,687,495.	2,668,071.	2,668,071.	
	11 Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶				
	12 Investments - mortgage loans				
	13 Investments - other STMT 7	7,113,438.	9,041,860.	9,041,860.	
	14 Land, buildings, and equipment: basis ▶ 130,524.		130,524.	130,524.	
	Less: accumulated depreciation ▶				
	15 Other assets (describe ▶ STATEMENT 8)	72,438.	57,194.	57,194.	
	16 Total assets (to be completed by all filers)	13,697,855.	14,360,759.	14,360,759.	
	Liabilities	17 Accounts payable and accrued expenses	24,925.	78,478.	
		18 Grants payable	285,667.	97,000.	
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)		5,249.	-1,705.		
23 Total liabilities (add lines 17 through 22)		315,841.	173,773.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☒ X and complete lines 24 through 26 and lines 30 and 31.				
	24 Unrestricted	13,382,014.	14,186,986.		
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ☐ and complete lines 27 through 31.				
	27 Capital stock, trust principal, or current funds				
	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	13,382,014.	14,186,986.			
31 Total liabilities and net assets/fund balances	13,697,855.	14,360,759.			

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)	13,382,014.
2 Enter amount from Part I, line 27a	-850,957.
3 Other increases not included in line 2 (itemize) ▶ UNREALIZED GAIN ON INVESTMENTS	1,655,929.
4 Add lines 1, 2, and 3	14,186,986.
5 Decreases not included in line 2 (itemize) ▶	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	14,186,986.

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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 FNMA CALLABLE 4.020% BOND	P		04/20/09
b PENNSYLVANIA CONV. CTR AUTH TAXABLE BOND	P		09/01/09
c U.S. TREASURY NOTE	P		06/01/09
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 500,000.		488,700.	11,300.
b 500,000.		494,755.	5,245.
c 2,000,000.		1,997,188.	2,812.
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) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			11,300.
b			5,245.
c			2,812.
d			
e			

2 Capital gain net income or (net capital loss)	2	19,357.
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	1,149,425.	16,270,785.	.070643
2007	738,249.	16,537,650.	.044641
2006	362,475.	7,431,514.	.048775
2005	309,433.	3,748,372.	.082551
2004	0.	303,077.	.000000

2 Total of line 1, column (d)	2	.246610
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	.049322
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	13,594,793.
5 Multiply line 4 by line 3	5	670,522.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,240.
7 Add lines 5 and 6	7	674,762.
8 Enter qualifying distributions from Part XII, line 4	8	1,334,356.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.
See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	4,240.
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	4,240.
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	4,240.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	5,547.	
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	5,547.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,307.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ☒ 1,307. Refunded ☐	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	SEE STATEMENT 10	
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?	N/A	X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV		X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation		X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ► **WWW.ARBELLA.COM**

14 The books are in care of ► **THE CORPORATION** Telephone no. ► **617-328-2936**
 Located at ► **1100 CROWN COLONY DRIVE, QUINCY, MA** ZIP+4 ► **02269-9103**

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ► ☐
 and enter the amount of tax-exempt interest received or accrued during the year ► **15** N/A

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

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

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

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

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

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

N/A
▶ ☐

5b

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

6b

X

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

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

7b

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
SEE STATEMENT 11		0.	0.	0.

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

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

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

▶ 0

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services 0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	0.

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ARBELLA INSURANCE GROUP CHARITABLE
FOUNDATION, INC.**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	13,801,820.
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	13,801,820.
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	13,801,820.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	207,027.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	13,594,793.
6	Minimum investment return. Enter 5% of line 5	6	679,740.

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	679,740.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	4,240.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	4,240.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	675,500.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	675,500.
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	675,500.

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	1,334,356.
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	1,334,356.
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	4,240.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,330,116.

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				675,500.
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	42,303.			
c From 2006				
d From 2007				
e From 2008	346,386.			
f Total of lines 3a through e	388,689.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$ 1,334,356.				
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				675,500.
e Remaining amount distributed out of corpus	658,856.			
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	1,047,545.			
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	1,047,545.			
10 Analysis of line 9				
a Excess from 2005	42,303.			
b Excess from 2006				
c Excess from 2007				
d Excess from 2008	346,386.			
e Excess from 2009	658,856.			

Form 990-PF (2009)

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

N/A

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(1)(3) or ☐ 4942(1)(5)

b 85% of line 2a

c Qualifying distributions from Part XII,
line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test - enter:
(1) Value of all assets

(2) Value of assets qualifying under section 4942(i)(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

1 Information Regarding Foundation Managers:

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

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

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

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

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

SEE ATTACHED

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

SEE ATTACHED

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

SEE ATTACHED

ARBELLA INSURANCE GROUP CHARITABLE
FOUNDATION, INC.**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED				1334356.
Total			3a	1334356.
b Approved for future payment				
Total SEE STATEMENT 12			3b	97,000.

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 11-10-10
			Title CFO
Paid Preparer's Use Only	Preparer's signature 	Date 10/25/10	Check if self-employed ☐
	Firm's name (or yours if self-employed), address, and ZIP code CATURANO AND COMPANY, P.C. 80 CITY SQUARE BOSTON, MA 02129-3742	Preparer's identifying number EIN Phone no 617-912-9000	

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
UBS FINANCIAL SERVICES	235,972.	0.	235,972.
VANGUARD INDEX FUND	168,683.	0.	168,683.
TOTAL TO FM 990-PF, PART I, LN 4	404,655.	0.	404,655.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	20,410.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 16B	20,410.	0.	0.	0.

FORM 990-PF	TAXES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	4,297.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	4,297.	0.	0.	0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MANAGEMENT EXPENSE	70,000.	0.	0.	0.
MISCELLANEOUS EXPENSE	49,018.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 23	119,018.	0.	0.	0.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 5

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US GOVERNMENT OBLIGATIONS	X		797,160.	797,160.
MUNICIPAL SECURITIES		X	932,268.	932,268.
TOTAL U.S. GOVERNMENT OBLIGATIONS			797,160.	797,160.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			932,268.	932,268.
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,729,428.	1,729,428.

FORM 990-PF CORPORATE BONDS STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	2,668,071.	2,668,071.
TOTAL TO FORM 990-PF, PART II, LINE 10C	2,668,071.	2,668,071.

FORM 990-PF OTHER INVESTMENTS STATEMENT 7

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	FMV	8,572,559.	8,572,559.
ASSET BACKED SECURITIES	FMV	469,301.	469,301.
TOTAL TO FORM 990-PF, PART II, LINE 13		9,041,860.	9,041,860.

FORM 990-PF OTHER ASSETS STATEMENT 8

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
ACCRUED INTEREST INCOME	72,438.	57,194.	57,194.
TO FORM 990-PF, PART II, LINE 15	72,438.	57,194.	57,194.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	9
DESCRIPTION	BOY AMOUNT	EOY AMOUNT	
ACCRUED FEDERAL TAX	5,249.	-1,705.	
TOTAL TO FORM 990-PF, PART II, LINE 22	5,249.	-1,705.	

FORM 990-PF	STATEMENT OF ACTIVITIES NOT PREVIOUSLY REPORTED PART VII-A, LINE 2	STATEMENT	10
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EXPLANATION

BEGINNING IN DECEMBER 2009, THE FOUNDATION CONTRACTED A COMPANY TO BUILD A TRAILER THAT INCLUDED A SIMULATION PROGRAM FOR NEW DRIVERS TO TEACH THEM ABOUT DISTRACTED DRIVING.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	11
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JOHN F. DONOHUE 101 ARCH STREET, SUITE 1860 BOSTON, MA 02110	PRESIDENT, DIRECTOR 1.00	0.	0.	0.
CHRISTOPHER E. HALL 1100 CROWN COLONY DRIVE QUINCY, MA 02269	TREASURER 1.00	0.	0.	0.
BEVERLY TANGVIK 101 ARCH STREET, SUITE 1860 BOSTON, MA 02110	SECRETARY 3.00	0.	0.	0.
PATRICIA BAILEY 309 RODRIGUEZ STREET, UNIT C SANTA FE, NM 87501	DIRECTOR 1.00	0.	0.	0.
FRANCIS X BELLOTTI 1100 CROWN COLONY DRIVE QUINCY, MA 02269	DIRECTOR 1.00	0.	0.	0.

ARBELLA INSURANCE GROUP CHARITABLE FOUND

05-0613355

ANNE DEFRANCESCO C/O DEFRANCESCO CONSULTING, 1 CHESHIRE STREET LONDONDERRY, NH 03053	DIRECTOR 1.00	0.	0.	0.
EDMUND J DOHERTY C/O BARRY & MCHUGH AGENCY, 10 SKINLINGS ROAD WINCHESTER, MA 01890	DIRECTOR 1.00	0.	0.	0.
J ROBERT DOWLING C/O DOWLING INSURANCE, INC., 44 ADAMS STREET BRAINTREE, MA 02185	DIRECTOR 1.00	0.	0.	0.
WILLIAM H DUMOUCHEL 7164 N. MERCER SPRING PLACE TUCSON, AZ 85750	DIRECTOR 1.00	0.	0.	0.
ANDREA GARGIULO 13 WEST CEDAR STREET BOSTON, MA 02109	DIRECTOR 1.00	0.	0.	0.
DAVID W HATTMAN TCS HOLDING, INC, 1213 HIGHWAY 35 SOUTH ROCKPORT, TX 78382	DIRECTOR 1.00	0.	0.	0.
THOMAS R KILEY COSGROVE, EISENBERG & KILEY, 1 INTERNATIONAL PLACE SUITE 1820 BOSTON, MA 02110	DIRECTOR 1.00	0.	0.	0.
JEANNETTE M ORSINO ORSINO CONSULTING, 130 BOWDOIN STREET SUITE 1801 BOSTON, MA 02108	DIRECTOR 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
APPROVED FOR FUTURE PAYMENT

STATEMENT 12

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
BOSTON SYMPHONY ORCHESTRA BOSTON, MA	NONE COMMUNITY/CIVIC/CULTUR	PUBLIC CHARITY	30,000.
GREATER BOSTON LEGAL SERVICES BOSTON, MA	NONE LOW INCOME/EMPLOYMENT ASSISTANCE	PUBLIC CHARITY	25,000.
UNITED WAY BOSTON, MA	NONE CHILDREN/FAMILIES/YOUT PROGRAMS	PUBLIC CHARITY	22,000.
SPECIAL OLYMPICS MASSACHUSETTS BOSTON, MA	NONE CHILDREN/FAMILIES/YOUT PROGRAMS	PUBLIC CHARITY	20,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3B			97,000.

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

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

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

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

Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization ARBELLA INSURANCE GROUP CHARITABLE FOUNDATION, INC.	Employer identification number 05-0613355
	Number, street, and room or suite no. If a P.O. box, see instructions. 101 ARCH STREET, NO. 1860	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. BOSTON, MA 02110	

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.

THE CORPORATION

- The books are in the care of ☒ **1100 CROWN COLONY DRIVE - QUINCY, MA 02269-9103**

Telephone No ☒ **617-328-2936**

FAX No. ☐

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

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

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

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

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

7 State in detail why you need the extension

ADDITIONAL TIME IS REQUIRED TO FILE 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	\$	4,240.
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	\$	5,547.
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 ☐

Title ☐

Date ☐

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

Arbella Insurance Group Charitable Foundation, Inc.
 EIN 05-0613355
 Schedule of Program Grants or Contributions
 2009 Form 990-PF, Part XV, Line 3a

Organization name	Address	Relationship To Foundation	Foundation Status	Purpose of Grant or Contribution	Amount
88 SFFM/WFCR	Amherst MA	None	Public Charity	Community/Civic/Cultural	\$ 50 00
Aoord Food pantry	S Hamilton, MA	None	Public Charity	Human Services	\$ 750 00
Action for Boston Community Development	Boston, MA	None	Public Charity	Children/Families/Youth Programs	\$ 15 000 00
Advocacy Resource Center of Greater New Bedford	New Bedford, MA	None	Public Charity	Children/Families/Youth Programs	\$ 270 00
ALS Association Massachusetts Chapter	Norwood, MA	None	Public Charity	Research/Support	\$ 200 00
ALS Family Charitable Foundation	Buzzards Bay MA	None	Public Charity	Research/Support	\$ 100 00
Alzheimer's Association	Watertown MA	None	Public Charity	Research/Support	\$ 125 00
America Scores New England Scores	Dorchester, MA	None	Public Charity	Children/Families/Youth Programs	\$ 50 00
American Cancer Society	Frammingham, MA	None	Public Charity	Research/Support	\$ 21 422 00
American Heart Association	E Syracuse, NY	None	Public Charity	Research/Support	\$ 125 00
American Legion Brockton Post 35	Brockton, MA	None	Public Charity	Community/Civic/Cultural	\$ 400 00
American National Red Cross-Beverly Chapter	Beverly, MA	None	Public Charity	Research/Support	\$ 250 00
Amherst College Trustees	Amherst, MA	None	Public Charity	Educational/Scholarship	\$ 45 00
Angkor Dance Troupe	Lowell, MA	None	Public Charity	Community/Civic/Cultural	\$ 125 00
Animal Protection Center of South Eastern MA	North Easton MA	None	Public Charity	Community/Civic/Cultural	\$ 200 00
Animal Rescue League of New Bedford	New Bedford, MA	None	Public Charity	Community/Civic/Cultural	\$ 2,500 00
Another Chance 4 Horses Inc	Bermville, PA	None	Public Charity	Low Income/Employment Assistance	\$ 805 00
Arlington Catholic High School	Arlington MA	None	Public Charity	Educational/Scholarship	\$ 1 500 00
Arlington Food Pantry	Arlington MA	None	Public Charity	Human Services	\$ 500 00
Arthur R. Lambert Memorial Foundation	Northboro, MA	None	Public Charity	Educational/Scholarship	\$ 2,500 00
Association for Community Living	Springfield MA	None	Public Charity	Children/Families/Youth Programs	\$ 100 00
Autism Resource Center of Central MA	W Boylston MA	None	Public Charity	Research/Support	\$ 165 00
Autism Speaks, Inc.	Princeton NJ	None	Public Charity	Research/Support	\$ 100 00
Avon Education Foundation, Inc	Avon CT	None	Public Charity	Educational/Scholarship	\$ 500 00
Avon Products Foundation	Rye NY	None	Public Charity	Research/Support	\$ 655 00
Avon Walk for Breast Cancer	New York, NY	None	Public Charity	Research/Support	\$ 800 00
Bank of America Sterling School	Quincy MA	None	Public Charity	Educational/Scholarship	\$ 750 00
Bay Path College	Longmeadow MA	None	Public Charity	Educational/Scholarship	\$ 70 00
Baystate Health Foundation	Springfield MA	None	Public Charity	Research/Support	\$ 1 435 00
Baystate Mary Lane Hospital	Ware MA	None	Public Charity	Research/Support	\$ 1 000 00
Belchertown Firefighter Association, Inc	Belchertown, MA	None	Public Charity	Community/Civic/Cultural	\$ 170 00
Berkshire Community Action Food Pantry	Pittsfield MA	None	Public Charity	Human Services	\$ 500 00
Berkshire Theatre Festival	Stockbridge MA	None	Public Charity	Community/Civic/Cultural	\$ 2 000 00
Beth Israel Deaconess Medical Center	Medford MA	None	Public Charity	Research/Support	\$ 325 00
Beverly Bootstraps Community Service	Beverly, MA	None	Public Charity	Children/Families/Youth Programs	\$ 1 000 00
Boston Business Journal	Boston MA	None	Public Charity	Educational/Scholarship	\$ 14 445 00
Boston Celtics Shamrock Foundation	Boston MA	None	Public Charity	Children/Families/Youth Programs	\$ 15 100 00
Boston College	Chestnut Hill MA	None	Public Charity	Educational/Scholarship	\$ 2 500 00
Boston College High School	Boston MA	None	Public Charity	Educational/Scholarship	\$ 5 445 00
Boston Local Development / RedBoston	Boston MA	None	Public Charity	Community/Civic/Cultural	\$ 25 00
Boston Minuteman Council	Milton MA	None	Public Charity	Children/Families/Youth Programs	\$ 1 000 00
Boston Rescue Mission	Boston MA	None	Public Charity	Low Income/Employment Assistance	\$ 19 20
Boston Symphony Orchestra	Boston, MA	None	Public Charity	Community/Civic/Cultural	\$ 105,680 00
Boy Scouts of America Yankee Clipper Council	Haverhill MA	None	Public Charity	Community/Civic/Cultural	\$ 540 00
Boys & Girls Club	Dorchester MA	None	Public Charity	Children/Families/Youth Programs	\$ 3 500 00
Brackett Elementary School PTO Cnckett Yard	Arlington MA	None	Public Charity	Children/Families/Youth Programs	\$ 500 00
Brain Aneurysm Foundation	Hanover, MA	None	Public Charity	Research/Support	\$ 50 00
Bread & Roses, Inc	Lawrence MA	None	Public Charity	Human Services	\$ 2 000 00
Bread of Life	Malden MA	None	Public Charity	Children/Families/Youth Programs	\$ 1 200 00
Breast Cancer 3 Day	Jenkintown PA	None	Public Charity	Research/Support	\$ 900 00
Bridgeport Rescue Mission Inc	Bridgeport CT	None	Public Charity	Low Income/Employment Assistance	\$ 500 00
Bingham and Women Hospital	Boston MA	None	Public Charity	Research/Support	\$ 100 00
Bristol Good Neighbors Soup Kitchen & Food Pantry	Bristol RI	None	Public Charity	Children/Families/Youth Programs	\$ 1 000 00
Canton Area HelpLine-Canton Food Pantry	Canton MA	None	Public Charity	Community/Civic/Cultural	\$ 500 00
Canton Education Foundation Inc	Canton CT	None	Public Charity	Educational/Scholarship	\$ 750 00
Canton High School Athletic Booster Club	Canton, MA	None	Public Charity	Children/Families/Youth Programs	\$ 1 020 00
Cardinal Spellman High School	Brockton MA	None	Public Charity	Educational/Scholarship	\$ 750 00
Catholic Charities	Boston, MA	None	Public Charity	Community/Civic/Cultural	\$ 7 600 00
Catholic Guardian Society & Home Bureau	New York, NY	None	Public Charity	Community/Civic/Cultural	\$ 5 500 00
Center for Human Development	Springfield MA	None	Public Charity	Children/Families/Youth Programs	\$ 250 00
Cerebral Palsy Council of Greater New Bedford	Dartmouth, MA	None	Public Charity	Research/Support	\$ 255 00
Children Tumor Foundation	Newton, MA	None	Public Charity	Research/Support	\$ 25 00
Children's Hospital Boston	Boston, MA	None	Public Charity	Research/Support	\$ 1,400 00
Chip-in Food Pantry of Charlton Inc	Charlton, MA	None	Public Charity	Community/Civic/Cultural	\$ 500 00
Christ United Methodist Church / Island Food Pantry	Vineyard Haven, MA	None	Public Charity	Children/Families/Youth Programs	\$ 500 00
Christmas in the City	Boston, MA	None	Public Charity	Children/Families/Youth Programs	\$ 2,500 00
Chrismas in April Lowell, Inc	Tewksbury, MA	None	Public Charity	Community/Civic/Cultural	\$ 250 00
City of Norwich	Norwich CT	None	Public Charity	Low Income/Employment Assistance	\$ 1,000 00
City of Quincy	Quincy MA	None	Public Charity	Educational/Scholarship	\$ 1 000 00
City of Torrington	Torrington CT	None	Public Charity	Community/Civic/Cultural	\$ 1 000 00
Coalition for a Better Acre	Lowell, MA	None	Public Charity	Community/Civic/Cultural	\$ 500 00
College of the Holy Cross	Worcester, MA	None	Public Charity	Educational/Scholarship	\$ 1,500 00
Community Autism Resources, Inc	Swansea MA	None	Public Charity	Community/Civic/Cultural	\$ 500 00
Community Care Services	Taunton, MA	None	Public Charity	Community/Civic/Cultural	\$ 5 000 00
Community Foundation of Southeastern Massachusetts Women's Fund	New Bedford, MA	None	Public Charity	Community/Civic/Cultural	\$ 100 00
Community Health Center of Cape Cod, Inc	Mashpee, MA	None	Public Charity	Community/Civic/Cultural	\$ 250 00
Community Health Resources inc	Windsor CT	None	Public Charity	Low Income/Employment Assistance	\$ 500 00
Community Service of Hamilton & Wenham, Inc	Hamilton MA	None	Public Charity	Community/Civic/Cultural	\$ 250 00
Congregation of the Sisters of St. Joseph of Boston	Brighton MA	None	Public Charity	Children/Families/Youth Programs	\$ 500 00
Connecticut 4-H Development Fund Inc	Bloomfield CT	None	Public Charity	Children/Families/Youth Programs	\$ 1,000 00
Connecticut Children's Medical Center	Hartford, CT	None	Public Charity	Children/Families/Youth Programs	\$ 2 500 00
Connecticut Food Bank	New Haven, CT	None	Public Charity	Community/Civic/Cultural	\$ 1 745 00
Cotting School for Handicapped Children	Lexington, MA	None	Public Charity	Educational/Scholarship	\$ 250 00
Covenant Christian Academy	West Peabody, MA	None	Public Charity	Educational/Scholarship	\$ 250 00
Cradles to Crayons	Quincy MA	None	Public Charity	Children/Families/Youth Programs	\$ 8 000 00
Creativity for Peace	Santa Fe, NM	None	Public Charity	Children/Families/Youth Programs	\$ 1,000 00
Cystic Fibrosis Foundation	Nashua, NH	None	Public Charity	Research/Support	\$ 1,232 00
Daily Bread Food Pantry	Milford, MA	None	Public Charity	Human Services	\$ 700 00
Dana Farber Cancer Institute	Boston, MA	None	Public Charity	Research/Support	\$ 23,085 00
Dana Farber Jimmy Fund	Boston, MA	None	Public Charity	Research/Support	\$ 3,215 05

Danvers Community Council / Danvers Food Pantry	Danvers, MA	None	Public Charity	Human Services	\$	1 500 00
Danna Devanna Center	Braintree MA	None	Public Charity	Children/Families/Youth Programs	\$	1 800 00
Diocesan Department of Education	Taunton, MA	None	Public Charity	Community/Civic/Cultural	\$	500 00
Diocese of Providence Catholic School Office	Coventry RI	None	Public Charity	Community/Civic/Cultural	\$	200 00
Doorways Inc	Seekonk MA	None	Public Charity	Human Services	\$	200 00
Dracut Community Food Pantry Inc	Dracut MA	None	Public Charity	Community/Civic/Cultural	\$	500 00
Eagle Eye Institute	Somerville, MA	None	Public Charity	Community/Civic/Cultural	\$	250 00
East Bay Food Pantry Inc	Bristol RI	None	Public Charity	Community/Civic/Cultural	\$	500 00
Easter Seals Massachusetts, Inc	Worcester MA	None	Public Charity	Research/Support	\$	3 500 00
Easthampton Community Center, Inc	Easthampton, MA	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Easthampton Learning Foundation, Inc	Easthampton MA	None	Public Charity	Educational/Scholarship	\$	2 500 00
Easton Food Pantry	N Easton MA	None	Public Charity	Community/Civic/Cultural	\$	250 00
Edgar P Benjamin Healthcare Inc	Boston, MA	None	Public Charity	Research/Support	\$	2 500 00
Emergency Aid Association Inc	Suffield, CT	None	Public Charity	Low Income/Employment Assistance	\$	500 00
Emmanuel Baptist Church - Norfolk Food Pantry	Norfolk, MA	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Enfield Food Shelf Inc	Enfield, CT	None	Public Charity	Community/Civic/Cultural	\$	500 00
Epilepsy Foundation of MA/RI	Boston MA	None	Public Charity	Research/Support	\$	25 00
Esther R Sanger Center for Compassion, Inc	Quincy MA	None	Public Charity	Community/Civic/Cultural	\$	1 000 00
Fair Theatre Company, Inc	Fairfield CT	None	Public Charity	Community/Civic/Cultural	\$	100 00
Fairfield Fire Department Town of Fairfield	Fairfield CT	None	Public Charity	Community/Civic/Cultural	\$	1 000 00
Fairfield University	Fairfield CT	None	Public Charity	Educational/Scholarship	\$	400 00
Falmouth Academy	Falmouth, MA	None	Public Charity	Educational/Scholarship	\$	500 00
Falmouth Service Center	Falmouth, MA	None	Public Charity	Low Income/Employment Assistance	\$	250 00
Families First Parenting Programs	Cambridge, MA	None	Public Charity	Children/Families/Youth Programs	\$	2 500 00
Family Pantry Cord	Hanwick, MA	None	Public Charity	Human Services	\$	180 00
Family Service Inc	Lawrence MA	None	Public Charity	Children/Families/Youth Programs	\$	350 00
Father Bill's Place	Quincy MA	None	Public Charity	Low Income/Employment Assistance	\$	17 725 00
Festa Calabrese, Inc	Braintree MA	None	Public Charity	Community/Civic/Cultural	\$	500 00
First Baptis Church of Revere - Food Pantry	Revere, MA	None	Public Charity	Community/Civic/Cultural	\$	200 00
First Congregational Church of E Weymouth	E Weymouth, MA	None	Public Charity	Children/Families/Youth Programs	\$	900 00
Fitchburg State College Foundation	Fitchburg MA	None	Public Charity	Educational/Scholarship	\$	2 500 00
Fontbonne Academy	Milton MA	None	Public Charity	Educational/Scholarship	\$	25 00
Food Share	Bloomfield CT	None	Public Charity	Community/Civic/Cultural	\$	1 745 00
For Our Residents of Easton, Inc	North Easton, MA	None	Public Charity	Community/Civic/Cultural	\$	1 500 00
Franklin County Community Meal Program	Greenfield MA	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Frindly Food Pantry of Randolph	Randolph MA	None	Public Charity	Community/Civic/Cultural	\$	1 000 00
Friends of Children's Trust Fund	Boston MA	None	Public Charity	Children/Families/Youth Programs	\$	12 500 00
Friends of St Joseph's Food Pantry	Salem, MA	None	Public Charity	Community/Civic/Cultural	\$	1 000 00
Friends of the Peabody Institute Libraries	Peabody, MA	None	Public Charity	Community/Civic/Cultural	\$	100 00
Friends of the Reading Public Library	Reading MA	None	Public Charity	Community/Civic/Cultural	\$	100 00
Friends of the Scituate Animal Shelter	Scituate MA	None	Public Charity	Community/Civic/Cultural	\$	500 00
Friends of the Unborn, Inc	Quincy MA	None	Public Charity	Children/Families/Youth Programs	\$	175 00
Friendship Home Inc	Hingham, MA	None	Public Charity	Children/Families/Youth Programs	\$	5 000 00
Gencorp Insurance Chantable Foundation	East Greenwich, RI	None	Public Charity	Children/Families/Youth Programs	\$	2 500 00
Germaine Lawrence Inc	Arlington MA	None	Public Charity	Children/Families/Youth Programs	\$	2 000 00
Gifts of Love	Avon CT	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Ginny's Helping Hand Inc / Food Pantry	Leominster, MA	None	Public Charity	Community/Civic/Cultural	\$	500 00
Girl Scouts Patriots Trail Council	Boston MA	None	Public Charity	Children/Families/Youth Programs	\$	50 00
Girls Incorporated of Holyoke	Holyoke MA	None	Public Charity	Community/Civic/Cultural	\$	1 100 00
Graff Family Services	San Jose CA	None	Public Charity	Children/Families/Youth Programs	\$	100 00
Greater Boston Legal Services	Boston MA	None	Public Charity	Low Income/Employment Assistance	\$	25 000 00
Greater Boston Morehouse Alumni Association	Boston MA	None	Public Charity	Educational/Scholarship	\$	2 300 00
Greater Fall River Recreation Committee Inc	Fall River MA	None	Public Charity	Human Services	\$	1 250 00
Gregg Neighborhood House Association, Inc	Lynn MA	None	Public Charity	Community/Civic/Cultural	\$	2 500 00
Gregg's Giving Tree, Inc	Wanwick, RI	None	Public Charity	Community/Civic/Cultural	\$	750 00
GWARC, Inc	Waltham MA	None	Public Charity	Community/Civic/Cultural	\$	25 00
Harrington Memorial Hospital	Southbridge MA	None	Public Charity	Research/Support	\$	2 500 00
Haven From Hunger	Peabody MA	None	Public Charity	Human Services	\$	500 00
Health Law Advocates	Boston MA	None	Public Charity	Research/Support	\$	2 500 00
Helping Our Women Inc	Provincetown MA	None	Public Charity	Community/Civic/Cultural	\$	500 00
Heritage Christian Academy	E Falmouth MA	None	Public Charity	Educational/Scholarship	\$	750 00
Hockomock Area YMCA	North Attleboro MA	None	Public Charity	Community/Civic/Cultural	\$	2 500 00
Holbrook Ecumenical Food Pantry	Holbrook MA	None	Public Charity	Community/Civic/Cultural	\$	500 00
Homes for Our Troops	Taunton, MA	None	Public Charity	Children/Families/Youth Programs	\$	228 20
Hospice & Palliative Care of Cape Cod	Hyannis MA	None	Public Charity	Research/Support	\$	1 000 00
Hospice of Southeastern CT	Norwich CT	None	Public Charity	Research/Support	\$	500 00
Hospice of the North Shore	Danvers, MA	None	Public Charity	Community/Civic/Cultural	\$	25 00
Hospitality Homes	Boston MA	None	Public Charity	Community/Civic/Cultural	\$	250 00
Housing Assistance Corp	Hyannis, MA	None	Public Charity	Low Income/Employment Assistance	\$	5 000 00
Hudson Community Food Pantry, Inc	Hudson, MA	None	Public Charity	Human Services	\$	1 000 00
Huntington Theatre Company	Boston MA	None	Public Charity	Children/Families/Youth Programs	\$	2 500 00
Hyde Park Square Task Force	Jamaica Plain, MA	None	Public Charity	Community/Civic/Cultural	\$	5 000 00
Hyde Square Task Force	Jamaica Plain MA	None	Public Charity	Children/Families/Youth Programs	\$	50 00
Immaculate Conception / St Joseph's Food Pantry	Salem, MA	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Institute for Business & Home Safety	Tampa, FL	None	Public Charity	Community/Civic/Cultural	\$	5 178 00
Insurance Library Association	Boston, MA	None	Public Charity	Educational/Scholarship	\$	5 000 00
Interfaith Social Services Inc	Quincy MA	None	Public Charity	Low Income/Employment Assistance	\$	18 900 00
International Association of Lions Club Abington	Abington MA	None	Public Charity	Community/Civic/Cultural	\$	175 00
Insh Immigration Center Inc	Boston MA	None	Public Charity	Community/Civic/Cultural	\$	24 740 00
ISD Education Foundation Inc	Rockport TX	None	Public Charity	Educational/Scholarship	\$	250 00
Island Alliance, Inc	Boston, MA	None	Public Charity	Community/Civic/Cultural	\$	9 350 00
Islander's Children's Foundation, Inc	Plainview, NY	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Jack Morton Worldwide	Philadelphia, PA	None	Public Charity	Educational/Scholarship	\$	312 517 50
JCAM Charitable Foundation	Newton Centre, MA	None	Public Charity	Community/Civic/Cultural	\$	144 00
Jesuit Volunteer Corps	Baltimore, MD	None	Public Charity	Community/Civic/Cultural	\$	25 00
John Alexio Diabetes Foundation, Inc	Boston, MA	None	Public Charity	Research/Support	\$	250 00
John M Barry's & Girls Club of Newton	Newton, MA	None	Public Charity	Community/Civic/Cultural	\$	1 000 00
Jonathan McCarthy Foundation, Inc	Quincy, MA	None	Public Charity	Research/Support	\$	80 00
Jonnycake Center of Peace Dale	Peace Dale RI	None	Public Charity	Human Services	\$	500 00
Journey Forward Inc	Carlton, MA	None	Public Charity	Community/Civic/Cultural	\$	35 000 00
Julie's Family Learning Program	South Boston, MA	None	Public Charity	Children/Families/Youth Programs	\$	25 00
Junior Achievement	Colorado Springs CO	None	Public Charity	Educational/Scholarship	\$	25 00
Juvenile Diabetes Research Foundation	Wellesley Hill, MA	None	Public Charity	Research/Support	\$	930 00
Lawrence Family Development & Education Fund Inc	Lawrence MA	None	Public Charity	Children/Families/Youth Programs	\$	250 00
Lazarus House	Lawrence MA	None	Public Charity	Human Services	\$	1 500 00
Live & Let Live Farm Rescue	Chichester NH	None	Public Charity	Community/Civic/Cultural	\$	25 00
Londonderry Friends of Music	Londonderry, NH	None	Public Charity	Educational/Scholarship	\$	2 011 00
Longmeadow Educational Excellence Foundation	Longmeadow, MA	None	Public Charity	Educational/Scholarship	\$	5 000 00

Lorraine's Kitchen	Chicopee, MA	None	Public Charity	Community/Crnc/Cultural	\$	500 00
Lowell Festival Foundation	Lowell, MA	None	Public Charity	Community/Crnc/Cultural	\$	150 00
Lowell Parks and Conservation Trust	Lowell, MA	None	Public Charity	Community/Crnc/Cultural	\$	500 00
Lowell Plan, Inc	Lowell, MA	None	Public Charity	Community/Crnc/Cultural	\$	500 00
Lowell Public School Washington School	Lowell, MA	None	Public Charity	Educational/Scholarship	\$	50 00
Lowell Transitional Living Center	Lowell, MA	None	Public Charity	Human Services	\$	500 00
Lowell Wish Project, Inc	Lowell, MA	None	Public Charity	Community/Crnc/Cultural	\$	180 00
Lower Cape Ambulance Associates, Inc	Provincetown, MA	None	Public Charity	Community/Crnc/Cultural	\$	1,000 00
Lower Cape Outreach Council	S Wellfleet, MA	None	Public Charity	Human Services	\$	180 00
Ludlow Boys & Girls Club	Ludlow, MA	None	Public Charity	Community/Crnc/Cultural	\$	125 00
Lynn Economic Opportunity Inc	Lynn, MA	None	Public Charity	Human Services	\$	500 00
Lynn Shelter Association	Lynn, MA	None	Public Charity	Community/Crnc/Cultural	\$	150 00
M Patricia Cronin Foundation	Quincy, MA	None	Public Charity	Research/Support	\$	7,500 00
Maine Handicapped Skiing	Newry, ME	None	Public Charity	Community/Crnc/Cultural	\$	50 00
Malden Catholic High School	Malden, MA	None	Public Charity	Educational/Scholarship	\$	250 00
Manchester Community Music School	Manchester, NH	None	Public Charity	Educational/Scholarship	\$	100 00
March of Dimes	Concord, NH	None	Public Charity	Research/Support	\$	1,400 00
Manne Toys for Tots Foundation Devens	Quincy, VA	None	Public Charity	Community/Crnc/Cultural	\$	1,000 00
Market Ministries	New Bedford, MA	None	Public Charity	Children/Families/Youth Programs	\$	1,000 00
Marlborough Community Services, Inc	Marlborough, MA	None	Public Charity	Community/Crnc/Cultural	\$	500 00
Marshfield Food Pantry	Marshfield, MA	None	Public Charity	Community/Crnc/Cultural	\$	500 00
Massachusetts Advocates for Nursing Home Reform	Swampscott, MA	None	Public Charity	Community/Crnc/Cultural	\$	50 00
Massachusetts Affordable Housing Alliance	Dorchester, MA	None	Public Charity	Educational/Scholarship	\$	15,000 00
Massachusetts Eye & Ear Infirmary Inc	Boston, MA	None	Public Charity	Research/Support	\$	375 00
Massachusetts General Hospital	Boston, MA	None	Public Charity	Research/Support	\$	50 00
Massachusetts School of Professional Psychology	West Roxbury, MA	None	Public Charity	Research/Support	\$	1,000 00
Massachusetts Spina Bifida Association	N Andover, MA	None	Public Charity	Research/Support	\$	200 00
Massachusetts Women's Political Caucus	Boston, MA	None	Public Charity	Community/Crnc/Cultural	\$	2,500 00
Melanoma Foundation of New England	Georgetown, MA	None	Public Charity	Research/Support	\$	400 00
Merrimack College	North Andover, MA	None	Public Charity	Educational/Scholarship	\$	550 00
Merrimack Valley Philharmonic Society, Inc	Lawrence, MA	None	Public Charity	Children/Families/Youth Programs	\$	530 00
Michael J Donohoe Scholarship Fund	Georgetown, MA	None	Public Charity	Research/Support	\$	400 00
Middlesex Human Services Agency, Inc	Waltham, MA	None	Public Charity	Human Services	\$	2,900 00
Milford Regional Medical Center	Milford, MA	None	Public Charity	Research/Support	\$	7,500 00
Milton High School	Milton, MA	None	Public Charity	Educational/Scholarship	\$	250 00
Moebius Syndrome Foundation	Pilot Grove, MD	None	Public Charity	Research/Support	\$	500 00
Mother McAuley Liberal Arts High School	Chicago, IL	None	Public Charity	Educational/Scholarship	\$	2,500 00
Mount Auburn Hospital	Cambridge, MA	None	Public Charity	Research/Support	\$	4,750 00
Movin' with the Spirit	Columbia, CT	None	Public Charity	Community/Crnc/Cultural	\$	2,500 00
MSPCA	Boston, MA	None	Public Charity	Community/Crnc/Cultural	\$	1,280 00
Multiple Myeloma Research Foundation	Norwalk, CT	None	Public Charity	Research/Support	\$	25 00
Multiple Sclerosis Association of America	Cherry Hill, NJ	None	Public Charity	Research/Support	\$	25 00
My Brother's Keeper	Easton, MA	None	Public Charity	Low Income/Employment Assistance	\$	2,850 00
My Brother's Table	Lynn, MA	None	Public Charity	Human Services	\$	2,050 00
Nabek Service Council Food Pantry	Natick, MA	None	Public Charity	Children/Families/Youth Programs	\$	1,000 00
National Brain Tumor Society	Watertown, MA	None	Public Charity	Research/Support	\$	100 00
National Hospice Foundation	Arlington, VA	None	Public Charity	Research/Support	\$	25 00
National MS Society	Waltham, MA	None	Public Charity	Research/Support	\$	250 00
National Multiple Sclerosis Society	Waltham, MA	None	Public Charity	Research/Support	\$	395 00
Nativity Preparatory School	Jamaica Plain, MA	None	Public Charity	Educational/Scholarship	\$	1,000 00
Needham Community Council	Needham, MA	None	Public Charity	Community/Crnc/Cultural	\$	1,080 00
New England Center for Children, Inc	Southborough, MA	None	Public Charity	Children/Families/Youth Programs	\$	15 00
New England Life Flight Inc	Bedford, MA	None	Public Charity	Public Safety	\$	5,000 00
New England Life Flight Inc	Bedford, MA	None	Public Charity	Public Safety	\$	500 00
New England Wildlife Center	South Weymouth, MA	None	Public Charity	Community/Crnc/Cultural	\$	1,000 00
New Hampshire Philharmonic Orchestra, Inc	Manchester, NH	None	Public Charity	Community/Crnc/Cultural	\$	140 00
New Hartford PTO	New Hartford, CT	None	Public Charity	Educational/Scholarship	\$	500 00
New Hope	Attleboro, MA	None	Public Charity	Low Income/Employment Assistance	\$	500 00
New Hope Correctional Ministry	Abrington, MA	None	Public Charity	Community/Crnc/Cultural	\$	200 00
New Hope Inc	Attleboro, MA	None	Public Charity	Children/Families/Youth Programs	\$	2,000 00
NewEngland Patriots Charitable Foundation	Foxboro, MA	None	Public Charity	Community/Crnc/Cultural	\$	25 00
Newport Little League of Newport RI	Newport, RI	None	Public Charity	Community/Crnc/Cultural	\$	2,500 00
Newton-Wellesley Hospital	Newton, MA	None	Public Charity	Research/Support	\$	5,500 00
Noble Hospital	Westfield, MA	None	Public Charity	Research/Support	\$	2,500 00
North Andover Scholarship Foundation	North Andover, MA	None	Public Charity	Educational/Scholarship	\$	500 00
North Central Human Services	Fitchburg, MA	None	Public Charity	Children/Families/Youth Programs	\$	2,500 00
North Kingstown Food Pantry	N Kingstown, RI	None	Public Charity	Children/Families/Youth Programs	\$	500 00
North Shore Medical Center Cancer Walk	Salem, MA	None	Public Charity	Research/Support	\$	500 00
North Shore Philharmonic Orchestra	Danvers, MA	None	Public Charity	Community/Crnc/Cultural	\$	2,000 00
Northeastern University	Boston, MA	None	Public Charity	Educational/Scholarship	\$	50 00
Norwalk Emergency Shelter	Norwalk, CT	None	Public Charity	Low Income/Employment Assistance	\$	500 00
Norwich Human Services	Norwich, CT	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Notre Dame Education Center	South Boston, MA	None	Public Charity	Educational/Scholarship	\$	25 00
NPT Breast Cancer 3-Day	Jenkintown, PA	None	Public Charity	Research/Support	\$	50 00
NSMC Health Care Inc	Salem, MA	None	Public Charity	Research/Support	\$	50 00
Officer Jamie Cochrane Memorial Roadrace	Quincy, MA	None	Public Charity	Community/Crnc/Cultural	\$	1,000 00
Old Colony Council Boy Scouts of America	Canton, MA	None	Public Charity	Children/Families/Youth Programs	\$	300 00
Old Colony Hospice	Randolph, MA	None	Public Charity	Children/Families/Youth Programs	\$	2,320 00
Old Colony YMCA	Middleboro, MA	None	Public Charity	Children/Families/Youth Programs	\$	8,055 00
Open Pantry Community Services Inc	Springfield, MA	None	Public Charity	Community/Crnc/Cultural	\$	2,750 00
Open Table	Concord, MA	None	Public Charity	Human Services	\$	300 00
Operation A B L E of Greater Boston, Inc	Boston, MA	None	Public Charity	Educational/Scholarship	\$	3,000 00
Original Congregational Church Wrentham Food Pantry	Wrentham, MA	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Our Daily Bread Friends, Caring & Sharing	Mansfield, MA	None	Public Charity	Human Services	\$	450 00
Our Lady of Light Scholarship Foundation Inc	Fall River, MA	None	Public Charity	Educational/Scholarship	\$	1,000 00
Our Neighbor's Table	Amesbury, MA	None	Public Charity	Human Services	\$	800 00
Our Promise to Nicholas Foundation	Bedford, NH	None	Public Charity	Children/Families/Youth Programs	\$	2,500 00
Pan Massachusetts Challenge	Needham, MA	None	Public Charity	Community/Crnc/Cultural	\$	825 00
Par Fore the Cure	Marblehead, MA	None	Public Charity	Research/Support	\$	1,000 00
Parkinson's Unity Walk	New York, NY	None	Public Charity	Research/Support	\$	30 00
Pawtucket Redsox Charitable Foundation	Pawtucket, RI	None	Public Charity	Community/Crnc/Cultural	\$	5,000 00
People Helping People	Burlington, MA	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Pettengill House Inc	Saltbury, MA	None	Public Charity	Human Services	\$	500 00
Philanthropic Association of Swansea Inc	Swansea, MA	None	Public Charity	Research/Support	\$	1,500 00
Phoenix Charter Academy	Chelsea, MA	None	Public Charity	Educational/Scholarship	\$	2,500 00
PKD Foundation	Wayland, MA	None	Public Charity	Research/Support	\$	500 00
Plymouth Area Coalition for the Homeless	Kingston, MA	None	Public Charity	Human Services	\$	1,000 00
Plymouth State University	Plymouth, MA	None	Public Charity	Educational/Scholarship	\$	250 00

Prader-Willi Syndrome of NE	Sarasota FL	None	Public Charity	Research/Support	\$ 50 00
Professional Center for Handicapped Children, Inc	Andover, MA	None	Public Charity	Children/Families/Youth Programs	\$ 250 00
Progeria Research Foundation, Inc	Peabody MA	None	Public Charity	Research/Support	\$ 100 00
Project Bread - The Walk for Hunger	Boston MA	None	Public Charity	Community/Crnc/Cultural	\$ 58 082 00
Pure Water for the World, Inc	Rutland, VT	None	Public Charity	Research/Support	\$ 100 00
Quincy Animal Shelter	Quincy MA	None	Public Charity	Community/Crnc/Cultural	\$ 2 000 00
Quincy Asian Resources, Inc	Quincy, MA	None	Public Charity	Community/Crnc/Cultural	\$ 2,500 00
Quincy Community Partnership	Quincy MA	None	Public Charity	Educational/Scholarship	\$ 5 000 00
Quincy Medical Center	Quincy, MA	None	Public Charity	Research/Support	\$ 9,020 00
Quincy Medical Center - Quincy WIC Program	Randolph, MA	None	Public Charity	Community/Crnc/Cultural	\$ 1,000 00
Quincy School-Community Partnership	Quincy, MA	None	Public Charity	Educational/Scholarship	\$ 5 125 00
Randolph Food Pantry	Randolph MA	None	Public Charity	Children/Families/Youth Programs	\$ 500 00
Realogy Charitable Foundation Inc	Parsippany, NJ	None	Public Charity	Children/Families/Youth Programs	\$ 1 250 00
Rehoboth Food Pantry	Rehoboth, MA	None	Public Charity	Children/Families/Youth Programs	\$ 250 00
Retarded Adult Rehabilitative Assoc of Greater Lowell	Lowell, MA	None	Public Charity	Educational/Scholarship	\$ 250 00
Rhode Island Community Food Bank Association	Providence RI	None	Public Charity	Human Services	\$ 400 00
Rhode Island CPCU Scholarship Fund	Lincoln RI	None	Public Charity	Educational/Scholarship	\$ 1,000 00
Rising Tide Charter Public School	Plymouth MA	None	Public Charity	Educational/Scholarship	\$ 20 00
Robert F Kennedy Children's Action Corps	Boston, MA	None	Public Charity	Children/Families/Youth Programs	\$ 1,000 00
Rockland Assoc of Churches / Rockland Food Pantry	Rockland MA	None	Public Charity	Children/Families/Youth Programs	\$ 500 00
Rodman Ride for Kids	Foxboro MA	None	Public Charity	Children/Families/Youth Programs	\$ 25 00
Room To Grow National Inc	Boston, MA	None	Public Charity	Children/Families/Youth Programs	\$ 5 000 00
Rose's Place Inc	Boston, MA	None	Public Charity	Low Income/Employment Assistance	\$ 100 00
Rosindale Congregational Church / Rosindale Food	Rosindale, MA	None	Public Charity	Children/Families/Youth Programs	\$ 400 00
Roxbury Latin School	Roxbury MA	None	Public Charity	Educational/Scholarship	\$ 1 650 00
Ryan's Ride	Plymouth, MA	None	Public Charity	Community/Crnc/Cultural	\$ 2,500 00
Saint Anne's Hospital	Fall River, MA	None	Public Charity	Research/Support	\$ 25 00
Saint Matthew's Church / Food Pantry	Dorchester, MA	None	Public Charity	Community/Crnc/Cultural	\$ 200 00
Salem Philharmonic, Inc	Salem, MA	None	Public Charity	Community/Crnc/Cultural	\$ 100 00
Salvation Army	Boston, MA	None	Public Charity	Human Services	\$ 1,100 00
Sandwich Food Pantry	Sandwich, MA	None	Public Charity	Children/Families/Youth Programs	\$ 420 00
Save A Dog	Sudbury, MA	None	Public Charity	Community/Crnc/Cultural	\$ 25 00
Scholarship America Inc Avon	Avon, CT	None	Public Charity	Educational/Scholarship	\$ 500 00
Sean Joyce Foundation, Inc	Holbrook MA	None	Public Charity	Community/Crnc/Cultural	\$ 1,500 00
Shakespeare & Company	Lenox MA	None	Public Charity	Community/Crnc/Cultural	\$ 2,500 00
Shelter For The Homeless, Inc	Stamford, CT	None	Public Charity	Low Income/Employment Assistance	\$ 1 000 00
Siena College	Londonville, NY	None	Public Charity	Educational/Scholarship	\$ 50 00
Society of S S Cosmas & Damian	Cambridge, MA	None	Public Charity	Community/Crnc/Cultural	\$ 300 00
Society Of St Vincent De Paul	Medford MA	None	Public Charity	Community/Crnc/Cultural	\$ 200 00
Soup Kitchen in Provincetown, Inc	Provincetown, MA	None	Public Charity	Human Services	\$ 180 00
South Coast Mentoring Initiative for Learning Ed	New Bedford, MA	None	Public Charity	Children/Families/Youth Programs	\$ 10,000 00
South End Athletics & Activities Association, Inc	Boston, MA	None	Public Charity	Community/Crnc/Cultural	\$ 500 00
South End Community Center Inc	Springfield MA	None	Public Charity	Children/Families/Youth Programs	\$ 2,000 00
South Norfolk County Association for Retarded Citizens	Westwood MA	None	Public Charity	Educational/Scholarship	\$ 300 00
South Shore Charter Education Foundation	Accord, MA	None	Public Charity	Educational/Scholarship	\$ 300 00
South Shore Christian Academy, Inc	Weymouth, MA	None	Public Charity	Educational/Scholarship	\$ 100 00
South Shore Day Care	East Weymouth MA	None	Public Charity	Children/Families/Youth Programs	\$ 2,250 00
South Shore Elder Services, Inc	Braintree MA	None	Public Charity	Community/Crnc/Cultural	\$ 2,000 00
South Shore Habitat for Humanity	Braintree, MA	None	Public Charity	Community/Crnc/Cultural	\$ 4 000 00
South Shore Hospital	South Weymouth, MA	None	Public Charity	Research/Support	\$ 12 500 00
South Shore YMCA	Quincy, MA	None	Public Charity	Community/Crnc/Cultural	\$ 2,950 00
South Windsor Junior Women's Club, Inc	South Windsor, CT	None	Public Charity	Community/Crnc/Cultural	\$ 1,000 00
Southbury Fuel Bank	Southbury, CT	None	Public Charity	Low Income/Employment Assistance	\$ 750 00
Southbury Junior Women's Club	Southbury, CT	None	Public Charity	Low Income/Employment Assistance	\$ 750 00
Spina Bifida Association of Massachusetts, Inc	Melrose MA	None	Public Charity	Educational/Scholarship	\$ 1,000 00
Spinal Cord Society	Fergus Falls, MN	None	Public Charity	Research/Support	\$ 2,500 00
Springfield Library & Museums Association	Springfield, MA	None	Public Charity	Community/Crnc/Cultural	\$ 1 035 00
Springfield Symphony Orchestra	Springfield, MA	None	Public Charity	Community/Crnc/Cultural	\$ 100 00
St George's Episcopal Church Food Pantry	Lee MA	None	Public Charity	Community/Crnc/Cultural	\$ 500 00
St James Catholic Church Youth Ministry	Stoughton MA	None	Public Charity	Children/Families/Youth Programs	\$ 300 00
St John's Episcopal	Winthrop, MA	None	Public Charity	Community/Crnc/Cultural	\$ 200 00
St Joseph's Food Pantry	Salem, MA	None	Public Charity	Human Services	\$ 500 00
St Jude Children's Research Hospital	Memphis, TN	None	Public Charity	Research/Support	\$ 100 00
St Lukes Community Services, Inc	Stamford CT	None	Public Charity	Low Income/Employment Assistance	\$ 1,000 00
St Mary's Food Pantry Soughtbridge	Southbridge MA	None	Public Charity	Children/Families/Youth Programs	\$ 500 00
St Mary's High School	Lynn, MA	None	Public Charity	Educational/Scholarship	\$ 750 00
St Patrick Food Pantry	Pelham, NH	None	Public Charity	Community/Crnc/Cultural	\$ 250 00
St Vincent de Paul Society	Abington, MA	None	Public Charity	Community/Crnc/Cultural	\$ 200 00
Sterling Middle School	Quincy MA	None	Public Charity	Educational/Scholarship	\$ 3 000 00
Stoneham Community Service of SDA	Stoneham, MA	None	Public Charity	Human Services	\$ 500 00
Stoneham High School Athletics	Stoneham, MA	None	Public Charity	Educational/Scholarship	\$ 250 00
Stonehill College	Easton, MA	None	Public Charity	Educational/Scholarship	\$ 100 00
Suffolk University	Boston MA	None	Public Charity	Educational/Scholarship	\$ 250 00
Susan G Komen - Race for the Cure	Dallas, TX	None	Public Charity	Research/Support	\$ 60 00
Tabor Academy	Marion, MA	None	Public Charity	Educational/Scholarship	\$ 25 00
Tantasqua Education Foundation Inc	Fiskdale, MA	None	Public Charity	Educational/Scholarship	\$ 1,000 00
Teamsters Local 25 Autism Fund Inc	Boston MA	None	Public Charity	Research/Support	\$ 1,000 00
Teen Challenge New England, Inc	Brockton MA	None	Public Charity	Community/Crnc/Cultural	\$ 500 00
Tewksbury Community Pantry Inc	Tewksbury MA	None	Public Charity	Human Services	\$ 250 00
Thacher Montesson School	Milton, MA	None	Public Charity	Educational/Scholarship	\$ 500 00
Thayer Academy	Braintree MA	None	Public Charity	Educational/Scholarship	\$ 1,000 00
The Beverly Rotary Club Foundation Inc	Beverly MA	None	Public Charity	Community/Crnc/Cultural	\$ 250 00
The Doyle Field Foundation Inc	Leominster MA	None	Public Charity	Community/Crnc/Cultural	\$ 2,500 00
The Food Bank of Lower Fairfield County	Stamford CT	None	Public Charity	Community/Crnc/Cultural	\$ 500 00
The Friends of Scituate Animal Shelter	Scituate, MA	None	Public Charity	Community/Crnc/Cultural	\$ 500 00
The Gorden Center	Providence, RI	None	Public Charity	Children/Families/Youth Programs	\$ 325 00
The Great Westfield Emergency Food Pantry	Westfield MA	None	Public Charity	Human Services	\$ 200 00
The Greater Boston Food Bank	Boston, MA	None	Public Charity	Human Services	\$ 500 00
The Greater Boston YMCA	Boston MA	None	Public Charity	Children/Families/Youth Programs	\$ 12,500 00
The Greater Westfield Emergency Food Pantry	Westfield, MA	None	Public Charity	Human Services	\$ 200 00
The Holliston Pantry Shelf, Inc	Holliston, MA	None	Public Charity	Community/Crnc/Cultural	\$ 500 00
The Home for Little Wanderers	Boston, MA	None	Public Charity	Children/Families/Youth Programs	\$ 350 00
The House of the Seven Gables	Salem, MA	None	Public Charity	Community/Crnc/Cultural	\$ 2,500 00
The Kathryn Langlois Memorial Foundation Inc	Spencer MA	None	Public Charity	Children/Families/Youth Programs	\$ 250 00
The Martin Luther King Community Center	Newport RI	None	Public Charity	Community/Crnc/Cultural	\$ 500 00
The New England Board of Higher Education	Boston MA	None	Public Charity	Educational/Scholarship	\$ 8 300 00
The Old North Foundation	Boston MA	None	Public Charity	Community/Crnc/Cultural	\$ 10,000 00
The Open Door / Cape Ann Food Pantry	Gloucester, MA	None	Public Charity	Human Services	\$ 950 00

The Parent Project for Muscular Dystrophy	Middletown, OH	None	Public Charity	Research/Support	\$	145 00
The Pike School	Andover, MA	None	Public Charity	Educational/Scholarship	\$	1 000 00
The Second Step Inc.	Newtonville, MA	None	Public Charity	Community/Civic/Cultural	\$	500 00
The University of Texas M D Anderson Cancer Center	Houston, TX	None	Public Charity	Community/Civic/Cultural	\$	250 00
Torrington Chapter of Fish, Inc	Torrington, CT	None	Public Charity	Low Income/Employment Assistance	\$	1,000 00
Town of East Granby	East Granby, CT	None	Public Charity	Community/Civic/Cultural	\$	1 000 00
Town of Manchester, YSB	Manchester, CT	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Town Of Bridgewater Food Pantry	Bridgewater, MA	None	Public Charity	Human Services	\$	250 00
Town of Ludlow Veterans Memorial Committee	Ludlow, MA	None	Public Charity	Community/Civic/Cultural	\$	1,000 00
Town of South Hadley South Hadley Baseball Association	South Hadley MA	None	Public Charity	Children/Families/Youth Programs	\$	1,000 00
Toys For Tots	S Weymouth MA	None	Public Charity	Human Services	\$	500 00
Tn Parish Ecumenical Food Pantry	Hardwick MA	None	Public Charity	Community/Civic/Cultural	\$	100 00
Trustees of Boston University	Boston, MA	None	Public Charity	Educational/Scholarship	\$	80 00
Trustees of Tuft College	Medford, MA	None	Public Charity	Educational/Scholarship	\$	25 00
Tufts Medical Center, Inc	Boston, MA	None	Public Charity	Research/Support	\$	2 500 00
U S Navel Academy Foundation	Annapolis, MD	None	Public Charity	Educational/Scholarship	\$	750 00
Umass Amherst/Cleve Willis Endowment	Amherst, MA	None	Public Charity	Educational/Scholarship	\$	300 00
Union Congregational Church	E Bridgewater, MA	None	Public Charity	Community/Civic/Cultural	\$	500 00
United Church Of Christ/Allston Brighton Food Pantry	Brighton, MA	None	Public Charity	Children/Families/Youth Programs	\$	200 00
United States Naval Academy Foundation, Inc	Annapolis, MD	None	Public Charity	Educational/Scholarship	\$	500 00
University of Massachusetts Amherst	Amherst MA	None	Public Charity	Public Safety	\$	122,500 00
Veterans of Massachusetts	Taunton, MA	None	Public Charity	Research/Support	\$	500 00
Victory Junction Gang Camp	Randleman, NC	None	Public Charity	Community/Civic/Cultural	\$	50 00
Vietnam Veterans Workshop	Boston, MA	None	Public Charity	Low Income/Employment Assistance	\$	9 500 00
Visiting Nurse Association of Boston	Hyde Park, MA	None	Public Charity	Community/Civic/Cultural	\$	1 000 00
Wakefield Educational Foundation	Wakefield, MA	None	Public Charity	Educational/Scholarship	\$	131 00
Wakefield Interfaith Food Pantry	Wakefield, MA	None	Public Charity	Low Income/Employment Assistance	\$	500 00
Walpole Food Pantry	Walpole, MA	None	Public Charity	Human Services	\$	500 00
We Care About Homes LTD	Beverly MA	None	Public Charity	Children/Families/Youth Programs	\$	250 00
Wellspring Inc	Hull, MA	None	Public Charity	Educational/Scholarship	\$	200 00
Wenham Museum	Wenham MA	None	Public Charity	Community/Civic/Cultural	\$	500 00
West Suburban YMCA	Newton, MA	None	Public Charity	Children/Families/Youth Programs	\$	1 000 00
Westminster Community Food Pantry	Westminster MA	None	Public Charity	Community/Civic/Cultural	\$	1 000 00
Weymouth Council for the Hungry, Inc	East Weymouth, MA	None	Public Charity	Low Income/Employment Assistance	\$	550 00
WGBH	Boston, MA	None	Public Charity	Community/Civic/Cultural	\$	50 00
WGBH Educational Foundation	Boston, MA	None	Public Charity	Educational/Scholarship	\$	30 00
Windsor Locks Middle School	Windsor Locks CT	None	Public Charity	Children/Families/Youth Programs	\$	1 500 00
Winsted Area Child Care Center	Wormsted CT	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Woburn Historical Society	Woburn, MA	None	Public Charity	Community/Civic/Cultural	\$	1,300 00
Wolf Education & Research Center	Portland OR	None	Public Charity	Educational/Scholarship	\$	200 00
Womanade Inc	Hingham, MA	None	Public Charity	Low Income/Employment Assistance	\$	50 00
WOMR (Lower Cape Communications, Inc)	Provincetown MA	None	Public Charity	Community/Civic/Cultural	\$	500 00
Worcester County Food Bank	Shrewsbury, MA	None	Public Charity	Children/Families/Youth Programs	\$	500 00
Work Inc	Quincy, MA	None	Public Charity	Low Income/Employment Assistance	\$	5,000 00
Yankee Clipper Council Boy Scouts of America	Haverhill, MA	None	Public Charity	Children/Families/Youth Programs	\$	200 00

Total grants paid in 2009 \$ 1,334,355 95



ARBELLA INSURANCE GROUP CHARITABLE FOUNDATION

COMMUNITY GIFT PROGRAM

Arbella is committed to providing financial support to qualified non-profit organizations that assist the people and communities that we serve. This is achieved through the Community Gift Program.

Application Procedure:

Important note: Donations made by the AIGCF are by invitation only.

- 1. Complete the enclosed Community Gift Program Request Form.**
- 2. Sign and date the form on the bottom of page 2.**
- 3. Mail the completed form, your IRS letter, and general information about your organization to:**

**Beverly Tangvik
Director of Charitable Giving
Arbella Insurance Group Charitable Foundation, Inc.
101 Arch Street
Boston, MA 02110
(617) 769-3040
Charitable.Foundation@Arbella.com**

Important note: An IRS Section 501(c)(3) or Section 170 (c)(1) letter is required with every donation request.

Requests will be reviewed by the Foundation Committee.

Please allow 45 days for a response.

If an earlier response is preferred, please contact Beverly Tangvik at the email address above.



COMMUNITY GIFT PROGRAM REQUEST FORM

Organization's Requirements:

- The organization must be an IRS section 501(c)(3) organization or non-profit governmental agency under public control (for example: schools and libraries).
- The organization must provide services in a community that we serve.
- Donations cannot be made to a 509 (a)(3) Type III supporting organization.
- Grant funds will not be made to institutions or organizations whose primary purpose is to propagate a particular faith, creed or religion; political organizations or organizations whose primary purpose is political.

Organization's Information:

Organization's Name: _____

Tax Exempt I.D. No.: _____

NOTE: You must provide a copy of your IRS Section 501 (c)(3) letter or Section 170 (c)(1) letter in order to receive our donation.

Organization's
Contact Person: _____

Organization's Street Address: _____

Organization's City, State, Zip: _____

Telephone Number: _____

E-mail Address: _____

Amount of Request: _____

Tax Deductible Portion: _____

Describe Reason for Request: _____

Organization's Information Continued:

Please check **ONE** of the following that best describes your services:

_____ Health _____ Education _____ Public Safety _____ Community//Cultural

_____ Human Services _____ Children/Family/Youth Programs

Event and Ad Information (if applicable):

Name and
Date of Event. _____

Deadline for Ad: _____

Specifications: _____

E-mail address
for Ad _____

If Arbella elects to grant a donation, by signing below, I certify that this organization:

- is not a 509 (a)(3) Type III supporting organization;
- qualifies under Section 501(c)(3) or Section 170 (c)(1) of the Internal Revenue Code;
- that no goods or services will be exchanged for this tax deductible contribution;
- that all grant funds shall be used only for charitable, scientific, literary or educational purposes;
- and no grant funds can be used for any of the following purposes: to attempt to influence legislation or the outcome of any specific public election; to carry on, directly or indirectly, any voter registration drive; or to undertake any activities for any purpose other than ones specified in the Internal Revenue Code.

Organization's Authorized Signature	Name and Title	Date
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INTERNAL USE

Approval _____	Claims Office _____
Date _____	CT Office _____
Qualification _____	R I Office _____
Documentation _____	Agent _____