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Form **990-PF**

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

CHRISTINE E. MOSER FOUNDATION

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

C/O SCALISE, 35 PEARL ST. SUITE 301

Room/suite

City or town, state, and ZIP code

NEW BRITAIN**CT 06051**

A Employer identification number

06-1353117

B Telephone number (see page 10 of the instructions)

860-229-0369C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the
85% test, check here and attach computation ☐E If private foundation status was terminated under
section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination
under section 507(b)(1)(B), check here ☐

H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end
of year (from Part II, col (c),
line 16) **\$ 564,008** (Part I, column (d) must be on cash basis)
 J Accounting method ☐ Cash ☒ Accrual
☐ Other (specify)

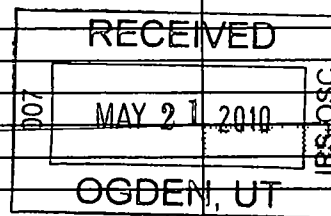
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))

	(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 (attach schedule)				
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	23,638	23,638		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10 STMT 1	-27,170			
b Gross sales price for all assets on line 6a 129,477				
7 Capital gain net income (from Part IV, line 2)		0		
8 Net short-term capital gain			0	
9 Income modifications				
10a Gross sales less returns & allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	-3,532	23,638	0	
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule) STMT 2	1,300	650		650
c Other professional fees (attach schedule) STMT 3	6,831	6,831		
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions) STMT 4	162			
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (att sch) STMT 5	1,395			
24 Total operating and administrative expenses. Add lines 13 through 23	9,688	7,481		650
25 Contributions, gifts, grants paid	48,900			48,900
26 Total expenses and disbursements. Add lines 24 and 25	58,588	7,481	0	49,550
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-62,120			
b Net investment income (if negative, enter -0-)		16,157		
c Adjusted net income (if negative, enter -0-)			0	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

Form 990-PF (2009)

SCANNED MAY 25 2010
Operating and Administrative Expenses



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	3,526	16,931	16,931
	2	Savings and temporary cash investments	5,803	21,550	21,550
	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 (attach schedule) (see page 16 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	2,765	2,603	2,603
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) SEE STMT 6	681,203	592,442	522,924
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	15	Other assets (describe ▶)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	693,297	633,526	564,008
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	693,297	633,526	
	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 (see page 17 of the instructions)	693,297	633,526	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	693,297	633,526	

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	693,297
2	Enter amount from Part I, line 27a	2	-62,120
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	2,889
4	Add lines 1, 2, and 3	4	634,066
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8	5	540
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	633,526

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 N/A				
b				
c				
d				
e				

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

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

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

2 Capital gain net income or (net capital loss) [If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7]		2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

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 page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of nonchantable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	49,965	644,552	0.077519
2007	20,200	815,044	0.024784
2006	40,162	807,353	0.049745
2005	37,625	736,938	0.051056
2004	49,355	818,565	0.060295

2 Total of line 1, column (d)	2	0.263399
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	0.052680
4 Enter the net value of nonchantable-use assets for 2009 from Part X, line 5	4	529,543
5 Multiply line 4 by line 3	5	27,896
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	162
7 Add lines 5 and 6	7	28,058
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.	8	49,550

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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	162
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	162
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	162
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	265
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	265
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	103
11	Enter the amount of line 10 to be Credited to 2010 estimated tax 103 Refunded	11	

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 page 19 of the 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 \$ (2) On foundation managers \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV		X
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) CT		
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 on page 27)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► ROBERT A. SCALISE, JR. 35 PEARL ST, SUITE 301 Located at ► NEW BRITAIN, CT	Telephone no ► 860-229-0369 ZIP+4 ► 06051		
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		► ☐

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

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

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

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

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

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

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

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

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ 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 page 22 of the instructions)? **N/A** ☐ **5b**

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

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☒

If "Yes" to 6b, file Form 8870

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).**

(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
ROBERT A. SCALISE, JR 35 PEARL STREET, SUITE 301 NEW BRITAIN CT 06051	TRUSTEE 1.00	0	0	0
WALTER R. KOZLOSKI 35 PEARL STREET, SUITE 301 NEW BRITAIN CT 06051	TRUSTEE 1.00	0	0	0
MICHELE VAN EPPS 35 PEARL STREET, SUITE 301 NEW BRITAIN CT 06051	TRUSTEE 1.00	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions).

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 **▶**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services (see page 23 of the instructions) 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 ▶**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 SEE STATEMENT 9**2****3****4****Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)**

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 page 24 of the instructions

3**Total.** Add lines 1 through 3 ▶

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	511,202
b	Average of monthly cash balances	1b	23,905
c	Fair market value of all other assets (see page 24 of the instructions)	1c	2,500
d	Total (add lines 1a, b, and c)	1d	537,607
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	537,607
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	8,064
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	529,543
6	Minimum investment return. Enter 5% of line 5	6	26,477

Part XI Distributable Amount (see page 25 of the 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	26,477
2a	Tax on investment income for 2009 from Part VI, line 5	2a	162
b	Income tax for 2009 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	162
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	26,315
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	26,315
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	26,315

Part XII Qualifying Distributions (see page 25 of the 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	49,550
b	Program-related investments—total from Part IX-B	1b	
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	49,550
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 (see page 26 of the instructions)	5	162
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	49,388

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

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				26,315
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2009				
a From 2004	8,695			
b From 2005	1,099			
c From 2006	175			
d From 2007				
e From 2008	18,058			
f Total of lines 3a through e	28,027			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 49,550				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d Applied to 2009 distributable amount				26,315
e Remaining amount distributed out of corpus	23,235			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	51,262			
b Prior years' undistributed income Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
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) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	8,695			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	42,567			
10 Analysis of line 9				
a Excess from 2005	1,099			
b Excess from 2006	175			
c Excess from 2007				
d Excess from 2008	18,058			
e Excess from 2009	23,235			

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

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

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

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

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 of 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).)

SEE STATEMENT 10

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

N/A

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 page 28 of the 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:

N/A

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

SEE STATEMENT 11

c Any submission deadlines

ONGOING

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

ROCKY HILL, CT AREA AND OTHER SELECTED ORGANIZATIONS.

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
a Paid during the year				
CPTV 1049 ASYLUM AVE HARTFORD CT 06105	NONE	501C3	PUBLIC RADIO PROGS	10,000
GOODSPEED FDN PO BOX A EAST HADDAM CT 06423	NONE	501C3	THEATRE IMPVTS	12,500
ALBANO BALLET 15 GRAND AVE HARTFORD CT 06105	NONE	501C3	PROGRAMS	2,000
LITERACY VOLUNTEERS 20 HIGH ST. NEW BRITAIN CT 06051	NONE	501C3	OPERATIONS	9,000
NEW BRITAIN SYMPHONY ORCH 114 WEST MAIN STREET NEW BRITAIN CT 06052	NONE	501C3	SYMPHONY	3,400
SOUND MUSIC, INC. 20 LYME ST. OLD LYME CT 06371	NONE	501C3	MUSIC	5,000
THE KATHERINE HEPBURN CUL 330 MAIN ST. OLD SAYBROOK CT 06475	NONE	501C3	THEATRE	1,000
FRIENDS OF WALNUT HILL PK PO BOX 2105 NEW BRITAIN CT 06050	NONE	501C3	COMMUNITY GARDEN	5,000
NICHOLAS MELLUZZO 93 FOXON PLACE NEW BRITAIN CT 06053	NONE	INDIVIDUAL CITY PARK IMPROVEMENTS		1,000
Total			▶ 3a	48,900
b Approved for future payment				
N/A				
Total			▶ 3b	

22034 CHRISTINE E. MOSER FOUNDATION

06-1353117

FYE: 12/31/2009

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Whom Sold	Description		How Received		Cost	Expense	Depreciation	Net Gain / Loss
	Date Acquired	Date Sold	Sale Price					
COVIDIEN LTD COM - 400 SHS	3/27/07	8/13/09	\$ 15,704	PURCHASE	15,895	\$	\$	-191
TYCO ELECTRONICS LTD - 400 SHS	3/27/07	11/03/09	8,616	PURCHASE	14,634			-6,018
AMERICAN CAP LTD COM - .25 SHS	11/08/06	11/24/09	1	PURCHASE	11			-10
AMERICAN EXPRES - 50 SHS	11/08/04	11/03/09	1,786	PURCHASE	2,457			-671
CELGENE CORP COM - 100 SHS	9/15/06	11/03/09	5,061	PURCHASE	4,075			986
D R HORTON INC - 440 SHS	6/29/04	11/03/09	4,880	PURCHASE	9,280			-4,400
DELL INC. - 430 SHS	6/29/04	5/14/09	4,670	PURCHASE	15,304			-10,634
EVERGREEN MULTI SECT INC FUND - 700	11/05/08	12/14/09	9,896	PURCHASE	7,945			1,951
INTL BUSINESS MACHINES - 80 SHS	10/10/03	7/06/09	8,051	PURCHASE	1,982			6,069
INTL BUSINESS MACHINES - 18 SHS	10/10/03	7/06/09	1,811	PURCHASE	1,467			344
L3 COMMUNICATIONS HLDG - 100 SHS	8/24/06	11/03/09	7,341	PURCHASE	7,405			-64
L3 COMMUNICATIONS HLDG - 100 SHS	9/15/06	11/03/09	7,341	PURCHASE	7,630			-289
MASCO CORP - 500 SHS	6/29/04	11/03/09	5,945	PURCHASE	15,565			-9,620
MASCO CORP - 40 SHS	10/31/05	11/03/09	476	PURCHASE	1,150			-674
MEDTRONIC CORP - 85 SHS	2/09/04	11/03/09	3,042	PURCHASE	4,028			-986
MERCK & CO. INC - 70 SHS	9/30/04	11/03/09	2,132	PURCHASE	2,353			-221
RAYTHEON COMPANY - 105 SHS	1/30/04	5/14/09	4,929	PURCHASE	3,215			1,714

22034 CHRISTINE E. MOSER FOUNDATION

06-1353117

FYE: 12/31/2009

Federal Statements**Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets (continued)**

Whom Sold	Description		How Received		Cost	Expense	Depreciation	Net Gain / Loss
	Date Acquired	Date Sold	Price					
RAYTHEON COMPANY - 112 SHS	1/30/04	6/01/09	\$ 5,126	PURCHASE	3,429	\$	\$	1,697
TUPPERWARE BRANDS CORP - 227 SHS	2/02/04	5/07/09	\$ 5,879	PURCHASE	4,035			1,844
TUPPERWARE BRANDS CORP - 150 SHS	2/02/04	8/13/09	\$ 4,962	PURCHASE	2,666			2,296
UNITED HEALTH GROUP INC - 200 SHS	4/25/06	6/01/09	\$ 5,476	PURCHASE	9,930			-4,454
UNITED HEALTH GROUP INC - 200 SHS	4/25/06	7/27/09	\$ 5,444	PURCHASE	9,930			-4,486
WAL-MART - 100 SHS	10/02/03	8/13/09	\$ 5,132	PURCHASE	5,464			-332
MEMC ELECT. MATERIALS, INC - 307 SHS	11/04/08	8/03/09	\$ 5,520	PURCHASE	6,797			-1,277
CLASS ACTION SUIT SETTLEMENT		12/18/09	256					256
TOTAL			\$ 129,477	\$ 156,647	\$ 0	\$ 0	\$ -27,170	

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total		Net Investment		Adjusted Net		Charitable Purpose	
ACCOUNTING AND TAX RETURNS PREPA	\$ 1,300		\$ 650		\$		\$	650
TOTAL	\$ 1,300		\$ 650		\$ 0		\$	650

Federal Statements**Statement 3 - Form 990-PF, Part I, Line 16c - Other Professional Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INVESTMENT COMPANY FEES	\$ 6,831	\$ 6,831	\$	\$
TOTAL	\$ 6,831	\$ 6,831	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
2009 EXCISE TAX	\$ 162	\$	\$	\$
TOTAL	\$ 162	\$ 0	\$ 0	\$ 0

Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES				
DUES	495			
INSURANCE	900			
TOTAL	\$ 1,395	\$ 0	\$ 0	\$ 0

Federal Statements

FYE: 12/31/2009

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
SEE SCHEDULE 1	\$ 681,203	\$ 592,442	COST	\$ 522,924
TOTAL	<u>\$ 681,203</u>	<u>\$ 592,442</u>		<u>\$ 522,924</u>

Statement 7 - Form 990-PF, Part III, Line 3 - Other Increases

<u>Description</u>	<u>Amount</u>
ADJUSTMENT FOR DIVIDEND INCOME TAXABLE IN 2008 & RECEIVED IN 2009	\$ 2,889
TOTAL	<u>\$ 2,889</u>

Statement 8 - Form 990-PF, Part III, Line 5 - Other Decreases

<u>Description</u>	<u>Amount</u>
ADJUSTMENT FOR DIVIDEND INCOME TAXABLE IN 2009 & RECEIVED IN 2010.	\$ 540
TOTAL	<u>\$ 540</u>

Statement 9 - Form 990-PF, Part IX-A, Line 1 - Summary of Direct Charitable Activities

Description

APPLY AND DEVOTE THE PROPERTY AND INCOME EXCLUSIVELY FOR
CHARITABLE, RELIGIOUS, SCIENTIFIC, LITERARY OR EDUCATIONAL
PURPOSES, EITHER DIRECTLY OR BY CONTRIBUTIONS TO
ORGANIZATIONS DULY AUTHORIZED TO CARRY SUCH ACTIVITIES;

SEE LIST OF GRANTS AWARDED IN SEC. XV 3.

Statement 10 - Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000

<u>Name of Manager</u>	<u>Amount</u>
FOUNDATION IS FUNDED BY AN INVESTMENT PORTFOLIO	\$
CONTRIBUTED BY CHRISTINE MOSER (DECEASED)	
TOTAL	\$ 0

Statement 11 - Form 990-PF, Part XV, Line 2b - Application Format and Required ContentsDescription

NO FORMAL APPLICATION; INQUIRIES SHOULD BE DIRECTED TO
THE FOUNDATION.

Form 990-PF, Part XV, Line 2c - Submission DeadlinesDescription

ONGOING

Form 990-PF, Part XV, Line 2d - Award Restrictions or LimitationsDescription

ROCKY HILL, CT AREA AND OTHER SELECTED ORGANIZATIONS.

22034 CHRISTINE E. MOSER FOUNDATION

06-1353117

Federal Statements

FYE: 12/31/2009

Taxable Dividends from Securities

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business Code</u>	<u>Exclusion Code</u>	<u>Postal Code</u>
ESSEX SVGS-COMMON STOCK	\$ 10,202		14	
ESSEX SVGS-FIDELITY MNY MKT	17		14	
ESSEX SVGS-MUTUAL FUNDS	13,419		14	
TOTAL	<u>\$ 23,638</u>			

990PF - 2009

Schedule I

990 Part II Line 10-b

	#shs	Cost 12/31/2009	Market 12/31/2009
AllianceBernstein Income Fund	6,000	47,970	49,500
Blackrock Debt Strat Fd Inc Com	2,700	50,769	25,585
Eaton Vance Ltd Dur Inc Fd Com	2,700	44,995	40,230
Evergreen Multi Sect Inc Fd Com	1,400	15,889	19,852
Abbott Labs Com	217	9,047	11,716
American Capital Ltd Com	1,313	30,326	3,204
American Express	300	14,742	12,156
Athena Health Inc	298	11,455	13,482
Becton Dickinson & Co	221	15,008	17,427
Celgene Corp Com	200	8,150	11,136
Computer Sciences Corp	290	13,302	16,684
Eastman Kodak Co	700	18,631	2,954
Exxon Mobil	180	15,478	12,274
Fiserv Inc	300	11,522	14,544
Frontier Communications Corp	2,390	31,846	18,666
Garmin LTD	368	11,123	11,297
General Electric	927	17,665	14,026
Google Inc CL A	30	12,408	18,599
International Business Machines	102	8,326	13,352
JP Morgan Chase & Co Com	460	10,189	19,168
Marathon Oil Corp	280	15,291	8,742
Medtronic Corp	300	14,217	13,194
MEMC Electronic Materials	675	14,944	9,194
Merck & Co Inc	400	11,430	14,616
MGIC Invst Corp Wis	500	27,254	2,890
Mylan Laboratories Inc	872	10,699	16,070
Proctor & Gamble	300	19,029	18,189
Raytheon Company Com	208	6,369	10,716
SPX Corp	230	7,937	12,581
Thermo Electron Corp	361	13,982	17,216
Tupperware Brands Corp	303	5,653	14,111
Tyco Intl Ltd Bermuda Shs	400	19,535	14,272
United Parcel Service Inc CL B Com	245	17,651	14,056
Wal-Mart	210	9,610	11,225
		<u>\$ 592,442</u>	<u>\$ 522,924</u>

Form **8868**
(Rev. April 2009)**Application for Extension of Time To File an
Exempt Organization Return**

OMB No 1545-1709

Department of the Treasury
Internal Revenue Service► **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 CHRISTINE E. MOSER FOUNDATION	Employer identification number 06-1353117
	Number, street, and room or suite no. If a P.O. box, see instructions C/O SCALISE, 35 PEARL ST. SUITE 301	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions NEW BRITAIN CT 06051	

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

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

- The books are in the care of ► **ROBERT A. SCALISE, JR.**

Telephone No ► **860-229-0369**

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 **08/15/10**, 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	\$	265
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	\$	265
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**For Privacy Act and Paperwork Reduction Act Notice, see Instructions.**Form **8868** (Rev. 4-2009)