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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

2009

Department of the Treasury
Internal Revenue Service

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

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

G Check all that apply: ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name changeUse the
IRS label.
Otherwise,
print
or type.
See Specific
Instructions.Alma Gibbs Donchian Charitable
Foundation, Inc.
c/o FCSN 88 Field Point Road
Greenwich, CT 06836-2508

A Employer identification number

06-1514400

B Telephone number (see the instructions)

203-661-1000

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated

under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year
(from Part II, column (c), line 16)

\$ 5,533,280.

J Accounting method. ☒ Cash ☐ Accrual
☐ Other (specify) _____

(Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and

Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see 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 (att sch)

2 Ck ☒ if the foundn is not req to att Sch B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5a Gross rents

b Net rental income or (loss)

6a Net gain/(loss) from sale of assets not on line 10

b Gross sales price for all assets on line 6a 1,311,668.

7 Capital gain net income (from Part IV, line 2)

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/(loss) (att sch)

11 Other income (attach schedule)

See Statement 1

12 Total. Add lines 1 through 11

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule) See St 2

b Accounting fees (attach sch)

c Other professional fees (attach sch) See St 3

17 Interest

18 Taxes (attach schedule) (see instr.)

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

See Statement 4

24 Total operating and administrative expenses. Add lines 13 through 23

25 Contributions, gifts, grants paid Part XV

26 Total expenses and disbursements. Add lines 24 and 25

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative, enter -0-)

23

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				
	2	Savings and temporary cash investments		233,877.	600,694.	600,694.
	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 the instructions)				
	7	Other notes and loans receivable (attach sch)				
		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 (attach schedule) Statement 5		298,947.	355,021.	380,851.
	b	Investments — corporate stock (attach schedule) Statement 6		3,548,125.	3,174,901.	3,658,768.
	c	Investments — corporate bonds (attach schedule) Statement 7		1,299,734.	850,684.	892,967.
	11	Investments — land, buildings, and equipment basis				
	Less accumulated depreciation (attach schedule)					
12	Investments — mortgage loans					
13	Investments — other (attach schedule)					
14	Land, buildings, and equipment: basis					
	Less accumulated depreciation (attach schedule)					
15	Other assets (describe)					
16	Total assets (to be completed by all filers — see instructions. Also, see page 1, item I)		5,380,683.	4,981,300.	5,533,280.	
LIABILITIES	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, & 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		5,380,683.	4,981,300.	
	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, building, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances (see the instructions)		5,380,683.	4,981,300.	
	31	Total liabilities and net assets/fund balances (see the instructions)		5,380,683.	4,981,300.	

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	5,380,683.
2	Enter amount from Part I, line 27a	2	-399,383.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	4,981,300.
5	Decreases not included in line 2 (itemize)	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	4,981,300.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a Increases per Schedule A-2 (Exhibit 5)		P	Various	Various
b Decreases per Schedule B-1 (Exhibit 6)		P	Various	Various
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 551,657.		442,865.	108,792.
b 760,011.		1,034,644.	-274,633.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			108,792.
b			-274,633.
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	-165,841.
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 the instructions) If (loss), enter -0- in Part I, line 8		3	0.

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 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 noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2008	365,232.	5,972,107.	0.061156
2007	416,213.	6,777,183.	0.061414
2006	394,874.	6,488,874.	0.060854
2005	400,284.	6,519,148.	0.061401
2004	438,702.	6,602,303.	0.066447

2 Total of line 1, column (d)	2	0.311272
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	0.062254
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	4,884,434.
5 Multiply line 4 by line 3	5	304,076.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,180.
7 Add lines 5 and 6	7	305,256.
8 Enter qualifying distributions from Part XII, line 4	8	349,443.

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.

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Form 990-PF (2009)

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

1 a 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 instr.)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	1,180.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (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	1,180.
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	1,180.
6 Credits/Payments			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	3,315.	
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	3,315.	
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	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	2,135.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax ☒ 1,180. ☒ Refunded	11	955.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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 the instructions for definition)? <i>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</i>		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? <i>If 'Yes,' attach a detailed description of the activities.</i>		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? <i>If 'Yes,' attach a conformed copy of the changes.</i>		X
4 a 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?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T.</i>		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? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see 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? <i>If 'No,' attach explanation</i>	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)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

Part VII-A Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>www.agdonchian.org</u>	13	X	
14	The books are in care of <u>Fogarty Cohen Selby & Nemiroff</u> Telephone no <u>203-661-1000</u> Located at <u>88 Field Point Road Greenwich CT</u> ZIP + 4 <u>06836-2508</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u> <u>N/A</u>			

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
1 a 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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐	1 b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1 c	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 <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
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 the instructions.)	2 b	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. <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
3 a 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)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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?	4 b	X

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Form 990-PF (2009)

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

5b N/A

Organizations relying on a current notice regarding disaster assistance check here

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

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

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

6b X

If 'Yes' to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b 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 (see 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
Geoffrey M. Parkinson c/o FCSN 88 Field Point Road Greenwich, CT 06836-2508	Pres/Treas/D 5.00	52,500.	0.	0.
Leland C. Selby c/o FCSN 88 Field Point Road Greenwich, CT 06836-2508	V Pres/Sec/D 5.00	28,500.	0.	0.
Holly Hitchcock c/o FCSN 88 Field Point Road Greenwich, CT 06836-2508	Director 3.00	15,000.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1— see 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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services – (see 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 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 (see 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 instructions	
3	
Total. Add lines 1 through 3	0.

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Form 990-PF (2009)

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	1 a	4,655,626.
b Average of monthly cash balances	1 b	303,190.
c Fair market value of all other assets (see instructions)	1 c	
d Total (add lines 1a, b, and c)	1 d	4,958,816.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	4,958,816.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	74,382.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,884,434.
6 Minimum investment return. Enter 5% of line 5.	6	244,222.

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	244,222.
2a Tax on investment income for 2009 from Part VI, line 5	2 a	1,180.
b Income tax for 2009 (This does not include the tax from Part VI)	2 b	
c Add lines 2a and 2b	2 c	1,180.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	243,042.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	243,042.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	243,042.

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	1 a	349,443.
b Program-related investments — total from Part IX-B	1 b	
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)	3 a	
b Cash distribution test (attach the required schedule)	3 b	
4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	349,443.
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 instructions)	5	1,180.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	348,263.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				243,042.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years. 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2009.				
a From 2004	118,987.			
b From 2005	83,695.			
c From 2006	71,929.			
d From 2007	88,796.			
e From 2008	71,445.			
f Total of lines 3a through e	434,852.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 349,443.				
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				243,042.
e Remaining amount distributed out of corpus	106,401.			
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	541,253.			
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 instructions			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) (see instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	118,987.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	422,266.			
10 Analysis of line 9				
a Excess from 2005	83,695.			
b Excess from 2006	71,929.			
c Excess from 2007	88,796.			
d Excess from 2008	71,445.			
e Excess from 2009	106,401.			

N/A

- (4) Gross investment income**

[illegible]

See Statement for Line 2a

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
<i>a Paid during the year</i> See attached Schedule B-3 (Exhibit 8)			see attached	265,700.
Total			▶ 3a	265,700.
<i>b Approved for future payment</i> See attached Schedule (Exhibit 9)				125,000.
Total			▶ 3b	125,000.

2009**Supporting Detail**
Alma Gibbs Donchian Charitable
Foundation, Inc.**Page 1**

Client VY-02920

06-1514400

5/11/10

04.35PM

Estimates**Overpayment applied from 2008**

per 2008 return as filed (w/\$903 to be refunded)	\$	2,412.
per IRS letter dtd 10/09/09 additional \$ applied		903.
Total	\$	<u>3,315.</u>

Other Income Producing Activities
Dividends/interest from securities.

Dividends per Schedule A-3 (Exhibit 1).	\$	77,819.
Interest per Schedule A-4 (Exhibit 2)		80,083.
Other Income per Schedule A-5 (Exhibit 3)		5,071.
Total	\$	<u>162,973.</u>

Federal Statements
Alma Gibbs Donchian Charitable
Foundation, Inc.

Statement 1
Form 990-PF, Part I, Line 11
Other Income

	(a) Revenue per Books	(b) Net Investment Income	(c) Adjusted Net Income
Class Action Citi Global	\$ 9,458.	\$ 9,458.	
USTreas Infl Indx OID	2,180.	2,180.	
Total	\$ 11,638.	\$ 11,638.	0.

Statement 2
Form 990-PF, Part I, Line 16a
Legal Fees

	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Fogarty Cohen Selby & Nemiroff LLC	\$ 6,625.	\$ 6,625.		
Total	\$ 6,625.	\$ 6,625.	\$ 0.	\$ 0.

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

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Bank of New York - Investment Advisory				
	\$ 35,478.	\$ 35,478.		
BNY Affiliated funds fee	122.	122.		
Total	\$ 35,600.	\$ 35,600.	\$ 0.	\$ 0.

Statement 4
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Association of Small Foundations	\$ 495.			
Council on Foundations	1,590.			
Total	\$ 2,085.	\$ 0.	\$ 0.	\$ 0.

Alma Gibbs Donchian Charitable
Foundation, Inc.

06-1514400

Statement 5
Form 990-PF, Part II, Line 10a
Investments - U.S. and State Government Obligations

<u>U.S. Government Obligations</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
US Government Obligations (Exhibit 4)	Cost	\$ 355,021.	\$ 380,851.
		\$ 355,021.	\$ 380,851.
	Total	\$ 355,021.	\$ 380,851.

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

<u>Corporate Stocks</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Corporate Stocks (Exhibit 4)	Cost	\$ 3,174,901.	\$ 3,658,768.
	Total	\$ 3,174,901.	\$ 3,658,768.

Statement 7
Form 990-PF, Part II, Line 10c
Investments - Corporate Bonds

<u>Corporate Bonds</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Corporate Bonds (Exhibit 4)	Cost	\$ 850,684.	\$ 892,967.
	Total	\$ 850,684.	\$ 892,967.

Statement 8
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

Name of Grant Program:

Name:

Care Of:

Street Address:

City, State, Zip Code:

Telephone:

Form and Content:

Submission Deadlines:

Restrictions on Awards:

Foundation Services LLC

640 West Putnam Avenue, 3rd floor

Greenwich, CT 06830

203-629-8320

Any applicant should submit an application form and certification as to its tax exempt status. The application form is available from the website.

None

Mission Statement and Guidelines attached as Exhibit 7.

Schedule A-3

DIVIDENDS RECEIVED

Abbott Laboratories

02/17/09	Dividend Rec'd on	475	Shs.	\$171.00	
05/15/09	Dividend Rec'd on	900	Shs.	190.00	
08/17/09	Dividend Rec'd on	900	Shs.	360.00	
11/16/09	Dividend Rec'd on	900	Shs.	<u>360.00</u>	\$1,081.00

Accenture Ltd Class A

11/16/09	Dividend Rec'd on	2,000	Shs.		1,500.00
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Aflac Inc.

03/02/09	Dividend Rec'd on	675	Shs.	\$189.00	
06/01/09	Dividend Rec'd on	675	Shs.	189.00	
09/01/09	Dividend Rec'd on	675	Shs.	189.00	
12/01/09	Dividend Rec'd on	675	Shs.	<u>189.00</u>	756.00

Air Prods & Chems Inc.

08/10/09	Dividend Rec'd on	325	Shs.	\$146.25	
11/09/09	Dividend Rec'd on	325	Shs.	<u>146.25</u>	292.50

American Express

02/10/09	Dividend Rec'd on	1,000	Shs.	\$180.00	
05/08/09	Dividend Rec'd on	1,000	Shs.	180.00	
08/10/09	Dividend Rec'd on	1,325	Shs.	238.50	
11/10/09	Dividend Rec'd on	1,325	Shs.	<u>238.50</u>	837.00

Apache Corp.

02/23/09	Dividend Rec'd on	425	Shs.	\$63.75	
05/22/09	Dividend Rec'd on	425	Shs.	<u>63.75</u>	127.50

Avon Products Inc.

03/02/09	Dividend Rec'd on	1,700	Shs.	\$357.00	
06/01/09	Dividend Rec'd on	1,700	Shs.	357.00	
09/01/09	Dividend Rec'd on	1,700	Shs.	357.00	
12/01/09	Dividend Rec'd on	1,700	Shs.	<u>357.00</u>	1,428.00

AT&T Corp.

02/02/09	Dividend Rec'd on	1,775	Shs.	\$727.75	
05/01/09	Dividend Rec'd on	1,775	Shs.	727.75	

Schedule A-3 (Cont'd)

AT&T Corp.
(Cont'd)

08/03/09	Dividend Rec'd on	1,775	Shs.	\$727.75	
11/02/09	Dividend Rec'd on	1,775	Shs.	<u>727.75</u>	\$2,911.00

Bank America Corp

03/27/09	Dividend Rec'd on	1,750	Shs.		17.50
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BNY Mellon Mid Cap Stock Fund

04/13/09	Dividend Rec'd on	12,376.238	Shs.	\$50.64	
05/18/09	Dividend Rec'd on	12,376.238	Shs.	55.79	
06/15/09	Dividend Rec'd on	12,376.238	Shs.	59.74	
07/13/09	Dividend Rec'd on	12,376.238	Shs.	59.67	
08/17/09	Dividend Rec'd on	12,376.238	Shs.	61.54	
09/14/09	Dividend Rec'd on	12,376.238	Shs.	67.71	
10/13/09	Dividend Rec'd on	12,376.238	Shs.	68.73	
11/09/09	Dividend Rec'd on	12,376.238	Shs.	72.29	
12/10/09	Dividend Rec'd on	12,376.238	Shs.	767.33	
12/14/09	Dividend Rec'd on	12,376.238	Shs.	<u>69.78</u>	1,333.22

Campbell Soup Company

02/02/09	Dividend Rec'd on	1,000	Shs.	\$250.00	
05/04/09	Dividend Rec'd on	1,000	Shs.	250.00	
08/03/09	Dividend Rec'd on	1,000	Shs.	250.00	
11/02/09	Dividend Rec'd on	1,000	Shs.	<u>250.00</u>	1,000.00

Cardinal Health Inc.

07/15/09	Dividend Rec'd on	500	Shs.	\$87.50	
10/15/09	Dividend Rec'd on	500	Shs.	<u>87.50</u>	175.00

Caterpillar Inc.

08/20/09	Dividend Rec'd on	475	Shs.	\$199.50	
11/20/09	Dividend Rec'd on	475	Shs.	<u>199.50</u>	399.00

Chevron Corporation

06/10/09	Dividend Rec'd on	375	Shs.	\$243.75	
09/10/09	Dividend Rec'd on	375	Shs.	255.00	
12/10/09	Dividend Rec'd on	375	Shs.	<u>255.00</u>	753.75

Schedule A-3 (Cont'd)

Coca Cola Enterprises Inc.

03/26/09	Dividend Rec'd on	1,200	Shs.		\$84.00
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Colgate Palmolive Company

02/13/09	Dividend Rec'd on	1,300	Shs.	\$520.00	
05/15/09	Dividend Rec'd on	350	Shs.	154.00	
08/14/09	Dividend Rec'd on	350	Shs.	154.00	
11/13/09	Dividend Rec'd on	350	Shs.	<u>154.00</u>	982.00

Comcast Corporation New Class A

01/28/09	Dividend Rec'd on	1,700	Shs.	\$106.25	
04/29/09	Dividend Rec'd on	1,700	Shs.	114.75	
07/29/09	Dividend Rec'd on	1,700	Shs.	114.75	
10/28/09	Dividend Rec'd on	1,700	Shs.	<u>114.75</u>	450.50

ConocoPhillips

03/02/09	Dividend Rec'd on	900	Shs.	\$423.00	
06/01/09	Dividend Rec'd on	900	Shs.	423.00	
09/01/09	Dividend Rec'd on	900	Shs.	423.00	
12/01/09	Dividend Rec'd on	900	Shs.	<u>450.00</u>	1,719.00

CVS Caremark Corp

02/03/09	Dividend Rec'd on	1,600	Shs.	\$122.00	
05/04/09	Dividend Rec'd on	1,600	Shs.	122.00	
08/03/09	Dividend Rec'd on	1,600	Shs.	122.00	
11/03/09	Dividend Rec'd on	1,600	Shs.	<u>122.00</u>	488.00

Dreyfus PR Large Cap Value Fund

04/13/09	Dividend Rec'd on	28,711.654	Shs.	\$76.95	
05/18/09	Dividend Rec'd on	28,711.654	Shs.	<u>44.39</u>	121.34

Duke Energy Holding Corp

03/16/09	Dividend Rec'd on	2,450	Shs.	\$563.50	
06/16/09	Dividend Rec'd on	2,450	Shs.	563.50	
09/16/09	Dividend Rec'd on	2,450	Shs.	588.00	
12/16/09	Dividend Rec'd on	2,450	Shs.	<u>588.00</u>	2,303.00

Eaton Corporation Common

02/25/09	Dividend Rec'd on	475	Shs.	\$237.50	
05/22/09	Dividend Rec'd on	475	Shs.	237.50	

Schedule A-3 (Cont'd)

Eaton Corporation Common
(Cont'd)

08/21/09	Dividend Rec'd on	475	Shs.	\$237.50	
11/27/09	Dividend Rec'd on	475	Shs.	<u>237.50</u>	\$950.00

E I DuPont DeNemours & Company

03/13/09	Dividend Rec'd on	1,100	Shs.	\$451.00	
06/12/09	Dividend Rec'd on	1,100	Shs.	451.00	
09/11/09	Dividend Rec'd on	1,100	Shs.	451.00	
12/14/09	Dividend Rec'd on	1,100	Shs.	<u>451.00</u>	1,804.00

Emerson Electric Company

03/10/09	Dividend Rec'd on	925	Shs.	\$305.25	
06/10/09	Dividend Rec'd on	1,425	Shs.	470.25	
09/10/09	Dividend Rec'd on	1,425	Shs.	470.25	
12/10/09	Dividend Rec'd on	1,425	Shs.	<u>477.38</u>	1,723.13

Exelon Corp.

03/10/09	Dividend Rec'd on	850	Shs.	\$446.25	
06/10/09	Dividend Rec'd on	850	Shs.	446.25	
09/10/09	Dividend Rec'd on	850	Shs.	446.25	
12/10/09	Dividend Rec'd on	850	Shs.	<u>446.25</u>	1,785.00

Exxon Mobil

03/10/09	Dividend Rec'd on	950	Shs.	\$380.00	
06/10/09	Dividend Rec'd on	1,575	Shs.	661.50	
09/10/09	Dividend Rec'd on	1,575	Shs.	661.50	
12/10/09	Dividend Rec'd on	1,575	Shs.	<u>661.50</u>	2,364.50

General Electric

01/26/09	Dividend Rec'd on	3,450	Shs.	\$1,069.50	
04/27/09	Dividend Rec'd on	3,450	Shs.	1,069.50	
07/27/09	Dividend Rec'd on	4,225	Shs.	422.50	
10/26/09	Dividend Rec'd on	4,225	Shs.	<u>422.50</u>	2,984.00

Goldman Sachs Group, Inc.

03/26/09	Dividend Rec'd on	200	Shs.	\$93.33	
06/25/09	Dividend Rec'd on	200	Shs.	70.00	
09/24/09	Dividend Rec'd on	200	Shs.	<u>70.00</u>	233.33

Schedule A-3 (Cont'd)

Hewlett Packard

07/01/09	Dividend Rec'd on	900	Shs.	\$72.00	
10/07/09	Dividend Rec'd on	900	Shs.	<u>72.00</u>	\$144.00

Home Depot

03/26/09	Dividend Rec'd on	1,100	Shs.	\$247.50	
06/25/09	Dividend Rec'd on	1,700	Shs.	382.50	
09/17/09	Dividend Rec'd on	1,700	Shs.	382.50	
12/17/09	Dividend Rec'd on	1,700	Shs.	<u>382.50</u>	1,395.00

Honeywell International Inc.

03/10/09	Dividend Rec'd on	650	Shs.	\$196.63	
06/10/09	Dividend Rec'd on	1,000	Shs.	302.50	
09/10/09	Dividend Rec'd on	1,000	Shs.	302.50	
12/10/09	Dividend Rec'd on	1,000	Shs.	<u>302.50</u>	1,104.13

Intel Corporation

03/02/09	Dividend Rec'd on	3,000	Shs.	\$420.00	
06/01/09	Dividend Rec'd on	4,300	Shs.	602.00	
09/01/09	Dividend Rec'd on	4,300	Shs.	602.00	
12/01/09	Dividend Rec'd on	4,300	Shs.	<u>602.00</u>	2,226.00

International Business Machines

03/10/09	Dividend Rec'd on	475	Shs.	\$237.50	
06/10/09	Dividend Rec'd on	475	Shs.	261.25	
09/10/09	Dividend Rec'd on	475	Shs.	261.25	
12/10/09	Dividend Rec'd on	475	Shs.	<u>261.25</u>	1,021.25

IShares Trust

01/05/09	Dividend Rec'd on	7,850	Shs.	\$4,247.75	
07/01/09	Dividend Rec'd on	5,625	Shs.	5,316.68	
12/31/09	Dividend Rec'd on	5,625	Shs.	<u>2,788.51</u>	12,352.94

Johnson & Johnson

03/10/09	Dividend Rec'd on	1,300	Shs.	\$598.00	
06/09/09	Dividend Rec'd on	1,300	Shs.	637.00	
09/08/09	Dividend Rec'd on	1,300	Shs.	637.00	
12/08/09	Dividend Rec'd on	1,300	Shs.	<u>637.00</u>	2,509.00

Schedule A-3 (Cont'd)

Johnson Ctls Inc.

07/02/09	Dividend Rec'd on	800	Shs.	\$104.00	
10/02/09	Dividend Rec'd on	800	Shs.	<u>104.00</u>	\$208.00

JP Morgan Chase & Co.

02/02/09	Dividend Rec'd on	1,550	Shs.	\$589.00	
04/30/09	Dividend Rec'd on	1,550	Shs.	77.50	
07/29/09	Dividend Rec'd on	2,000	Shs.	100.00	
11/02/09	Dividend Rec'd on	2,000	Shs.	<u>100.00</u>	866.50

Kraft Foods Inc. Cl A

07/14/09	Dividend Rec'd on	850	Shs.	\$246.50	
10/14/09	Dividend Rec'd on	850	Shs.	<u>246.50</u>	493.00

Mastercard Inc. Cl A

08/10/09	Dividend Rec'd on	125	Shs.	\$18.75	
11/10/09	Dividend Rec'd on	125	Shs.	<u>18.75</u>	37.50

McDonald's Corporation

03/16/09	Dividend Rec'd on	650	Shs.	\$325.00	
06/22/09	Dividend Rec'd on	650	Shs.	325.00	
09/15/09	Dividend Rec'd on	650	Shs.	325.00	
12/15/09	Dividend Rec'd on	650	Shs.	<u>357.50</u>	1,332.50

Medtronic Inc.

01/23/09	Dividend Rec'd on	450	Shs.	\$84.38	
04/24/09	Dividend Rec'd on	450	Shs.	84.38	
07/31/09	Dividend Rec'd on	725	Shs.	148.63	
10/30/09	Dividend Rec'd on	725	Shs.	<u>148.63</u>	466.02

Microsoft Corporation

03/12/09	Dividend Rec'd on	2,600	Shs.	\$338.00	
06/18/09	Dividend Rec'd on	2,675	Shs.	347.75	
09/10/09	Dividend Rec'd on	2,675	Shs.	347.75	
12/10/09	Dividend Rec'd on	2,675	Shs.	<u>347.75</u>	1,381.25

Midcap SPDR Trust Unit Series 1

01/30/09	Dividend Rec'd on	1,000	Shs.	\$555.29	
04/30/09	Dividend Rec'd on	1,000	Shs.	337.02	
07/31/09	Dividend Rec'd on	1,000	Shs.	393.92	

Schedule A-3 (Cont'd)

Midcap SPDR Trust Unit Series 1
(Cont'd)

10/30/09	Dividend Rec'd on	1,000	Shs.	<u>\$388.73</u>	\$1,674.96
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Monsanto Co. New

07/24/09	Dividend Rec'd on	225	Shs.	\$59.63	
10/30/09	Dividend Rec'd on	225	Shs.	<u>59.63</u>	119.26

Morgan Stanley

05/15/09	Dividend Rec'd on	625	Shs.	\$41.67	
08/14/09	Dividend Rec'd on	625	Shs.	31.25	
11/13/09	Dividend Rec'd on	625	Shs.	<u>31.25</u>	104.17

News Corp.

04/15/09	Dividend Rec'd on	2,600	Shs.		156.00
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Novartis AG Sponsored ADR

04/07/09	Dividend Rec'd on	450	Shs.	\$771.47	
04/07/09	Dividend Rec'd on	450	Shs.		
	Foreign tax withheld			115.72-	
04/09/09	Dividend Rec'd on	450	Shs.		
	ADR Fee			<u>1.58-</u>	654.17

Occidental Petroleum Corp.

07/15/09	Dividend Rec'd on	325	Shs.	\$107.25	
10/15/09	Dividend Rec'd on	325	Shs.	<u>107.25</u>	214.50

Oracle Corporation

05/08/09	Dividend Rec'd on	1,700	Shs.	\$85.00	
08/13/09	Dividend Rec'd on	2,600	Shs.	130.00	
11/04/09	Dividend Rec'd on	2,600	Shs.	<u>130.00</u>	345.00

Procter & Gamble

02/17/09	Dividend Rec'd on	1,000	Shs.	\$400.00	
05/15/09	Dividend Rec'd on	1,000	Shs.	440.00	
08/17/09	Dividend Rec'd on	1,000	Shs.	440.00	
11/16/09	Dividend Rec'd on	1,000	Shs.	<u>440.00</u>	1,720.00

Schedule A-3 (Cont'd)

Pepsico Inc.

01/02/09	Dividend Rec'd on	1,200	Shs.	\$510.00	
03/31/09	Dividend Rec'd on	1,200	Shs.	510.00	
06/30/09	Dividend Rec'd on	1,300	Shs.	585.00	
09/30/09	Dividend Rec'd on	1,300	Shs.	<u>585.00</u>	\$2,190.00

Philip Morris International, Inc.

01/09/09	Dividend Rec'd on	700	Shs.	\$378.00	
04/09/09	Dividend Rec'd on	700	Shs.	378.00	
07/10/09	Dividend Rec'd on	925	Shs.	499.50	
10/09/09	Dividend Rec'd on	925	Shs.	<u>536.50</u>	1,792.00

Pfizer Inc.

03/03/09	Dividend Rec'd on	1,800	Shs.	\$576.00	
06/02/09	Dividend Rec'd on	2,450	Shs.	392.00	
09/02/09	Dividend Rec'd on	2,450	Shs.	392.00	
12/01/09	Dividend Rec'd on	2,450	Shs.	<u>392.00</u>	1,752.00

Plum Creek Timber Co

03/06/09	Dividend Rec'd on	750	Shs.	\$315.00	
05/29/09	Dividend Rec'd on	750	Shs.	315.00	
08/31/09	Dividend Rec'd on	750	Shs.	315.00	
11/30/09	Dividend Rec'd on	750	Shs.	<u>315.00</u>	1,260.00

Praxair Inc.

03/16/09	Dividend Rec'd on	350	Shs.	\$140.00	
06/15/09	Dividend Rec'd on	350	Shs.	140.00	
09/15/09	Dividend Rec'd on	350	Shs.	140.00	
12/15/09	Dividend Rec'd on	350	Shs.	<u>140.00</u>	560.00

Qualcomm

06/26/09	Dividend Rec'd on	825	Shs.	\$140.25	
09/25/09	Dividend Rec'd on	825	Shs.	140.25	
12/23/09	Dividend Rec'd on	825	Shs.	<u>140.25</u>	420.75

Schering Plough Corp.

02/27/09	Dividend Rec'd on	1,525	Shs.	\$99.13	
05/26/09	Dividend Rec'd on	1,525	Shs.	99.13	
08/31/09	Dividend Rec'd on	1,525	Shs.	99.13	
11/30/09	Dividend Rec'd on	1,525	Shs.	<u>99.13</u>	396.52

Schedule A-3 (Cont'd)

Schlumberger Limited

01/12/09	Dividend Rec'd on	1,000	Shs.	\$210.00	
04/06/09	Dividend Rec'd on	1,000	Shs.	210.00	
07/10/09	Dividend Rec'd on	1,200	Shs.	252.00	
10/02/09	Dividend Rec'd on	1,200	Shs.	<u>252.00</u>	\$924.00

Teva Pharmaceuticals

03/20/09	Dividend Rec'd on	1,100	Shs.	\$153.99	
03/20/09	Dividend Rec'd on	1,100	Shs.		
	Foreign tax withheld			30.80-	
06/04/09	Dividend Rec'd on	1,100	Shs.	165.36	
06/04/09	Dividend Rec'd on	1,100	Shs.		
	Foreign tax withheld			33.07-	
08/25/09	Dividend Rec'd on	1,100	Shs.		
	Foreign tax withheld			34.32-	
08/27/09	Dividend Rec'd on	1,100	Shs.	171.61	
12/04/09	Dividend Rec'd on	1,100	Shs.	172.47	
12/04/09	Dividend Rec'd on	1,100	Shs.		
	Foreign tax withheld			<u>34.49-</u>	530.75

Textron Inc.

01/02/09	Dividend Rec'd on	800	Shs.	\$184.00	
04/01/09	Dividend Rec'd on	800	Shs.	16.00	
07/01/09	Dividend Rec'd on	800	Shs.	16.00	
10/01/09	Dividend Rec'd on	800	Shs.	<u>16.00</u>	232.00

3M Company

03/12/09	Dividend Rec'd on	400	Shs.		204.00
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TJX Companies Inc.

03/05/09	Dividend Rec'd on	825	Shs.	\$90.75	
06/04/09	Dividend Rec'd on	825	Shs.	99.00	
09/03/09	Dividend Rec'd on	825	Shs.	99.00	
12/03/09	Dividend Rec'd on	825	Shs.	<u>99.00</u>	387.75

Tyco International Ltd.

02/03/09	Dividend Rec'd on	600	Shs.	\$120.00	
06/02/09	Dividend Rec'd on	600	Shs.	123.72	
09/03/09	Dividend Rec'd on	600	Shs.	128.76	
11/24/09	Dividend Rec'd on	600	Shs.	<u>135.72</u>	508.20

Schedule A-3 (Cont'd)

Union Pacific Corp.

07/01/09	Dividend Rec'd on	575	Shs.	\$155.25	
10/01/09	Dividend Rec'd on	575	Shs.	<u>155.25</u>	\$310.50

United Technologies Corporation

03/10/09	Dividend Rec'd on	800	Shs.	\$308.00	
06/10/09	Dividend Rec'd on	1,025	Shs.	394.63	
09/10/09	Dividend Rec'd on	1,025	Shs.	394.63	
12/10/09	Dividend Rec'd on	1,025	Shs.	<u>394.63</u>	1,491.89

Verizon Communications

02/02/09	Dividend Rec'd on	800	Shs.	\$368.00	
05/01/09	Dividend Rec'd on	800	Shs.	368.00	
08/03/09	Dividend Rec'd on	800	Shs.	368.00	
11/02/09	Dividend Rec'd on	800	Shs.	<u>380.00</u>	1,484.00

Wal Mart Stores, Inc.

01/02/09	Dividend Rec'd on	900	Shs.	\$213.75	
04/06/09	Dividend Rec'd on	900	Shs.	245.25	
06/01/09	Dividend Rec'd on	900	Shs.	245.25	
09/08/09	Dividend Rec'd on	900	Shs.	<u>245.25</u>	949.50

Williams Co.

03/30/09	Dividend Rec'd on	1,700	Shs.	\$187.00	
06/29/09	Dividend Rec'd on	2,425	Shs.	266.75	
09/14/09	Dividend Rec'd on	2,425	Shs.	266.75	
12/28/09	Dividend Rec'd on	2,425	Shs.	<u>266.75</u>	987.25

XTO Energy Inc.

01/15/09	Dividend Rec'd on	625	Shs.	\$75.00	
04/15/09	Dividend Rec'd on	625	Shs.	78.13	
07/15/09	Dividend Rec'd on	625	Shs.	78.13	
10/15/09	Dividend Rec'd on	625	Shs.	<u>78.13</u>	<u>309.39</u>

TOTAL SCHEDULE A-3

\$77,818.92
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Schedule A-4

INTEREST RECEIVED

Astrazeneca PLC

5.4% Due 06/01/14

06/02/09	Interest Rec'd on	\$50,000.00	\$1,350.00	
12/02/09	Interest Rec'd on	\$50,000.00	<u>1,350.00</u>	\$2,700.00

AT&T Corp

6% Due 03/15/09

03/16/09	Interest Rec'd on	\$100,000.00		3,000.00
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Catepillar Financial Services

5.05% Due 03/01/12

06/01/09	Interest Rec'd on	\$50,000.00	\$1,262.50	
12/01/09	Interest Rec'd on	\$50,000.00	<u>1,262.50</u>	2,525.00

Cisco Sys Inc.

5.25% Due 02/22/11

02/23/09	Interest Rec'd on	\$50,000.00	\$1,312.50	
08/24/09	Interest Rec'd on	\$50,000.00	<u>1,312.50</u>	2,625.00

Dominion Resources Inc.

5% Due 03/15/13

03/16/09	Interest Rec'd on	\$100,000.00	\$2,500.00	
09/15/09	Interest Rec'd on	\$100,000.00	<u>2,500.00</u>	5,000.00

Federal Home Loan Mortgage Corp

5.75% Due 03/15/09

03/16/09	Interest Rec'd on	\$50,000.00		1,437.50
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Federated Government Obligation

Fund No 395

01/02/09	Interest Rec'd	\$198.11	
02/02/09	Interest Rec'd	95.48	
03/02/09	Interest Rec'd	49.96	
04/01/09	Interest Rec'd	49.50	
05/01/09	Interest Rec'd	19.44	
06/01/09	Interest Rec'd	1.85	
07/01/09	Interest Rec'd	.27	
09/02/09	Interest Rec'd	.21	
10/01/09	Interest Rec'd	8.95	

Schedule A-4 (Cont'd)

Federated Government Obligation
Fund No 395
(Cont'd)

11/02/09	Interest Rec'd		\$9.27	
12/01/09	Interest Rec'd		<u>9.62</u>	\$442.66

General Electric Capital Corp.
5.25% Due 10/19/12

04/20/09	Interest Rec'd on	\$50,000.00	\$1,312.50	
10/19/09	Interest Rec'd on	\$50,000.00	<u>1,312.50</u>	2,625.00

Goldman Sachs Group Inc.
5.25% Due 10/15/13

04/15/09	Interest Rec'd on	\$100,000.00	\$2,625.00	
10/15/09	Interest Rec'd on	\$100,000.00	<u>2,625.00</u>	5,250.00

Home Depot Inc.
5.2% Due 03/01/11

02/10/09	Interest Rec'd on	\$50,000.00		1,148.33
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John Deere Capital Corp.
5.1% Due 01/15/13

01/15/09	Interest Rec'd on	\$50,000.00	\$1,275.00	
07/15/09	Interest Rec'd on	\$50,000.00	<u>1,275.00</u>	2,550.00

JP Morgan Chase & Co.
5.25% Due 05/01/15

05/01/09	Interest Rec'd on	\$100,000.00	\$2,625.00	
08/24/09	Interest Rec'd on	\$50,000.00	823.96	
11/02/09	Interest Rec'd on	\$50,000.00	<u>1,312.50</u>	4,761.46

Morgan Stanley
5.3% Due 03/01/13

03/02/09	Interest Rec'd on	\$100,000.00	\$2,650.00	
08/24/09	Interest Rec'd on	\$50,000.00	1,273.47	
09/01/09	Interest Rec'd on	\$50,000.00	<u>1,325.00</u>	5,248.47

Northern States Power
7.12% Due 07/01/25

01/02/09	Interest Rec'd on	\$150,000.00	\$5,343.75	
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Schedule A-4 (Cont'd)

Northern States Power
7.12% Due 07/01/25
(Cont'd)

07/01/09	Interest Rec'd on	\$150,000.00	<u>\$5,343.75</u>	\$10,687.50
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Oracle Corp.
5.25% Due 01/15/16

01/15/09	Interest Rec'd on	\$50,000.00	\$1,312.50	
07/15/09	Interest Rec'd on	\$50,000.00	<u>1,312.50</u>	2,625.00

SLM Corporation M/T/N
5% Due 04/15/15

04/15/09	Interest Rec'd on	\$100,000.00	\$2,500.00	
08/24/09	Interest Rec'd on	\$100,000.00	<u>1,791.66</u>	4,291.66

SLM Corporation M/T/N
5.375% Due 01/15/13

01/15/09	Interest Rec'd on	\$100,000.00	\$2,687.50	
05/26/09	Interest Rec'd on	\$100,000.00	<u>1,955.90</u>	4,643.40

Target Corp.
5.875% Due 03/01/12

03/02/09	Interest Rec'd on	\$50,000.00	\$1,468.75	
09/01/09	Interest Rec'd on	\$50,000.00	<u>1,468.75</u>	2,937.50

US Treasury Notes
5% Due 08/15/11

02/17/09	Interest Rec'd on	\$150,000.00	\$3,750.00	
08/17/09	Interest Rec'd on	\$150,000.00	<u>3,750.00</u>	7,500.00

US Treasury Notes
5.125% Due 05/15/16

05/15/09	Interest Rec'd on	\$100,000.00	\$2,562.50	
11/16/09	Interest Rec'd on	\$100,000.00	<u>2,562.50</u>	5,125.00

United States Treasury Inflation
IX
2% Due 01/15/26

07/16/09	Interest Rec'd on	\$106,734.00	\$1,075.78	
04/21/09	Less: Interest Paid on Purchase		<u>566.10-</u>	509.68

Schedule A-4 (Cont'd)

Verizon Global Fdg Cor.
4.9% Due 09/15/15

03/16/09	Interest Rec'd on	\$50,000.00	\$1,225.00	
09/15/09	Interest Rec'd on	\$50,000.00	<u>1,225.00</u>	<u>\$2,450.00</u>

TOTAL SCHEDULE A-4

\$80,083.16
=====

Schedule A-5

OTHER INCOME RECEIVED

Ishares Russell 1000 Growth Index
Fd

01/02/09	Income Rec'd on	6,700	Units	\$1,104.19	
04/02/09	Income Rec'd on	6,700	Units	1,042.28	
07/09/09	Income Rec'd on	6,700	Units	1,217.28	
09/30/09	Income Rec'd on	6,700	Units	1,042.34	
12/31/09	Income Rec'd on	3,350	Units	<u>665.08</u>	<u>\$5,071.17</u>

TOTAL SCHEDULE A-5

\$5,071.17
=====

Schedule B-4

ASSETS ON HAND AS OF 12/31/09

<u>Bonds, Notes, etc.</u>	<u>Market Value</u>	<u>Inventory Value</u>
Astrazeneca PLC 5.4% Due 06/01/14 \$50,000.00	\$54,820.50	\$52,564.00
Catepillar Financial Services 5.05% Due 03/01/12 \$50,000.00	52,018.00	50,437.50
Cisco Sys Inc. 5.25% Due 02/22/11 \$50,000.00	52,466.50	49,881.33
Dominion Resources Inc. 5% Due 03/15/13 \$100,000.00	105,127.00	100,081.00
General Electric Capital Corp. 5.25% Due 10/19/12 \$50,000.00	53,211.00	49,630.00
Goldman Sachs Group Inc. 5.25% Due 10/15/13 \$100,000.00	106,201.00	101,714.00
John Deere Capital Corp. 5.1% Due 01/15/13 \$50,000.00	53,149.50	48,980.00
JP Morgan Chase & Co. 5.25% Due 05/01/15 \$50,000.00	52,035.00	50,872.00
Morgan Stanley 5.3% Due 03/01/13 \$50,000.00	52,700.00	51,467.00
Northern States Power 7.12% Due 07/01/25 \$150,000.00	150,000.00	150,987.50
Oracle Corp. 5.25% Due 01/15/16 \$50,000.00	53,993.00	48,156.00

Schedule B-4 (Cont'd)

<u>Bonds, Notes, etc. (Cont'd)</u>	<u>Market Value</u>	<u>Inventory Value</u>
Target Corp. 5.875% Due 03/01/12 \$50,000.00	\$54,176.00	\$50,589.00
US Treasury Notes 5% Due 08/15/11 \$150,000.00	159,937.50	152,173.83
US Treasury Notes 5.125% Due 05/15/16 \$100,000.00	111,531.00	99,343.75
United States Treasury Inflation IX 2% Due 01/15/26 \$108,914.00	109,382.33	103,502.65
Verizon Global Fdg Cor. 4.9% Due 09/15/15 \$50,000.00	53,070.00	45,324.00

Stock and Common Funds

Abbott Laboratories 900 Shs.	48,591.00	46,131.73
Accenture Ltd Class A 2,000 Shs.	83,000.00	47,309.34
Aflac Inc. 675 Shs.	31,218.75	35,542.67
Air Prods & Chems Inc. 325 Shs.	26,344.50	18,868.28
American Express 1,325 Shs.	53,689.00	14,986.88
Apple Inc. 500 Shs.	105,366.00	47,330.38
Avon Products Inc. 1,700 Shs.	53,550.00	44,320.97

Schedule B-4 (Cont'd)

<u>Stock and Common Funds (Cont'd)</u>	<u>Market Value</u>	<u>Inventory Value</u>
AT&T Corp. 1,775 Shs.	\$49,753.25	\$61,598.12
BNY Mellon Mid Cap Stock Fund 12,376.238 Shs.	118,069.31	150,000.00
Campbell Soup Company 1,000 Shs.	33,800.00	28,939.20
Cardinal Health Inc. 500 Shs.	16,120.00	12,159.86
Carefusion Corporation 250 Shs.	6,252.50	4,818.44
Caterpillar Inc. 475 Shs.	27,070.25	14,496.95
Chevron Corporation 375 Shs.	28,871.25	24,167.89
Cisco Systems 950 Shs.	22,743.00	23,189.24
Colgate Palmolive Company 350 Shs.	28,752.50	18,583.17
Comcast Corporation New Class A 1,700 Shs.	28,662.00	35,199.93
ConocoPhillips 900 Shs.	45,963.00	58,743.00
Duke Energy Holding Corp 2,450 Shs.	42,164.50	45,631.25
Eaton Corporation Common 475 Shs.	30,219.50	37,282.61
E I DuPont DeNemours & Company 1,100 Shs.	37,037.00	46,373.47
Emerson Electric Company 1,425 Shs.	60,705.00	61,059.49

Schedule B-4 (Cont'd)

<u>Stock and Common Funds (Cont'd)</u>	<u>Market Value</u>	<u>Inventory Value</u>
Exelon Corp. 850 Shs.	\$41,539.50	\$59,240.67
Exxon Mobil 1,575 Shs.	107,399.25	65,735.28
Freeport McMoran Copper & Gold Inc Class B 1,200 Shs.	96,348.00	32,060.68
General Electric 4,225 Shs.	63,924.25	66,188.13
Hewlett Packard 900 Shs.	46,359.00	31,616.64
Home Depot 1,700 Shs.	49,181.00	47,130.80
Honeywell International Inc. 1,000 Shs.	39,200.00	33,211.85
Intel Corporation 4,300 Shs.	87,720.00	73,370.78
International Business Machines 475 Shs.	62,177.50	43,457.06
Ishares Russell 1000 Growth Index Fd 3,350 Units	166,997.50	165,332.74
IShares Trust 5,625 Shs.	310,950.00	312,830.64
IShares S&P GSCI 1,775 Shs.	56,480.50	45,546.50
Johnson & Johnson 1,300 Shs.	83,733.00	72,382.87
Johnson Ctls Inc. 800 Shs.	21,792.00	12,951.32

Schedule B-4 (Cont'd)

<u>Stock and Common Funds (Cont'd)</u>	<u>Market Value</u>	<u>Inventory Value</u>
JP Morgan Chase & Co. 2,000 Shs.	\$83,340.00	\$81,137.75
Kraft Foods Inc. Cl A 850 Shs.	23,103.00	19,302.82
Mastercard Inc. Cl A 125 Shs.	31,997.50	19,980.00
McDonald's Corporation 650 Shs.	40,586.00	37,161.44
Medtronic Inc. 725 Shs.	31,885.50	28,870.31
Merck & Co Inc. 879 Shs.	32,118.66	22,295.39
Microsoft Corporation 2,675 Shs.	81,534.00	68,672.32
Midcap SPDR Trust Unit Series 1 1,000 Shs.	131,740.00	98,265.00
Monsanto Co. New 225 Shs.	18,393.75	17,624.25
Morgan Stanley 625 Shs.	18,500.00	15,575.00
Novartis AG Sponsored ADR 450 Shs.	24,493.50	22,238.30
Occidental Petroleum Corp. 325 Shs.	26,438.75	18,297.50
Oracle Corporation 2,600 Shs.	63,778.00	44,978.21
Procter & Gamble 1,000 Shs.	60,630.00	29,290.10
Pepsico Inc. 1,300 Shs.	79,040.00	70,631.56

Schedule B-4 (Cont'd)

<u>Stock and Common Funds (Cont'd)</u>	<u>Market Value</u>	<u>Inventory Value</u>
Philip Morris International, Inc. 925 Shs.	\$44,575.75	\$43,996.35
Pfizer Inc. 2,450 Shs.	44,565.50	73,353.05
Plum Creek Timber Co 750 Shs.	28,320.00	29,550.00
Praxair Inc. 350 Shs.	28,108.50	22,610.53
Qualcomm 825 Shs.	38,164.50	32,637.00
Schlumberger Limited 1,200 Shs.	78,108.00	40,269.27
Teva Pharmaceuticals 1,100 Shs.	61,798.00	44,594.00
Textron Inc. 800 Shs.	15,048.00	36,388.00
Thermo Fisher Scientific Inc. 975 Shs.	46,497.75	48,712.22
TJX Companies Inc. 825 Shs.	30,153.75	23,270.20
Tyco International Ltd. 600 Shs.	21,408.00	17,429.66
Union Pacific Corp. 575 Shs.	36,742.50	26,528.55
United Technologies Corporation 1,025 Shs.	71,145.25	46,099.03
Verizon Communications 800 Shs.	26,504.00	29,809.34
Wal Mart Stores, Inc. 900 Shs.	48,105.00	50,708.34

Schedule B-4 (Cont'd)

<u>Stock and Common Funds (Cont'd)</u>	<u>Market Value</u>	<u>Inventory Value</u>
Williams Co. 2,425 Shs.	\$51,119.00	\$54,688.75
XTO Energy Inc. 625 Shs.	29,081.25	22,149.44
 <u>Cash and Cash Equivalents</u>		
Cash	<u>600,694.39</u>	<u>600,694.39</u>
 TOTAL SCHEDULE B-4	 \$5,533,279.94 =====	 \$4,981,300.46 =====

Schedule A-2

INCREASE ON SALE OR REDEMPTION OF ASSETS

		<u>Proceeds</u>	<u>Inventory Value</u>	<u>Increase</u>
<u>Bonds, Notes, etc.</u>				
AT&T Corp 6% Due 03/15/09				
03/16/09	\$100,000.00	\$100,000.00	\$94,755.00	\$5,245.00
Federal Home Loan Mortgage Corp 5.75% Due 03/15/09				
03/16/09	\$50,000.00	50,000.00	47,429.69	2,570.31
Home Depot Inc. 5.2% Due 03/01/11				
02/10/09	\$50,000.00	50,329.50	49,793.17	536.33
JP Morgan Chase & Co. 5.25% Due 05/01/15				
08/24/09	\$50,000.00	51,465.50	50,872.00	593.50
Morgan Stanley 5.3% Due 03/01/13				
08/24/09	\$50,000.00	52,085.50	51,467.00	618.50
<u>Stock and Common Funds</u>				
Apple Inc.				
11/30/09	150 Shs.	30,607.21	14,199.12	16,408.09
BNY Mellon Mid Cap Stock Fund				
03/30/09	12,376.238 Shs.			
Received long term capital gain distribution - Increase recognized on receipt		95.30	.00	95.30

Schedule A-2 (Cont'd)

			<u>Proceeds</u>	<u>Inventory Value</u>	<u>Increase</u>
<u>Stock and Common Funds (Cont'd)</u>					
<u>Coca Cola Enterprises Inc.</u>					
04/23/09	1,200	Shs.	\$18,515.52	\$16,120.92	\$2,394.60
<u>Colgate Palmolive Company</u>					
04/23/09	950	Shs.	57,359.53	50,440.05	6,919.48
<u>Fiserv Inc</u>					
04/23/09	1,500	Shs.	53,893.61	20,460.70	33,432.91
<u>Goldman Sachs Group, Inc.</u>					
11/30/09	200	Shs.	34,210.32	22,735.69	11,474.63
<u>Merck & Co Inc.</u>					
11/05/09			16,012.50	.00	16,012.50
12/09/09			17.11	11.86	5.25
<u>Nabors Industries Ltd</u>					
10/06/09	1,825	Shs.	<u>37,065.53</u>	<u>24,580.21</u>	<u>12,485.32</u>
TOTAL SCHEDULE A-2			\$551,657.13 =====	\$442,865.41 =====	\$108,791.72 =====

Schedule B-1

DECREASE ON SALE OR REDEMPTION OF ASSETS

			<u>Inventory Value</u>	<u>Proceeds</u>	<u>Decrease</u>
<u>Bonds, Notes, etc.</u>					
SLM Corporation M/T/N					
5% Due 04/15/15					
08/24/09	\$100,000.00		\$99,266.00	\$66,550.00	\$32,716.00
SLM Corporation M/T/N					
5.375% Due 01/15/13					
05/26/09	\$100,000.00		102,727.00	72,050.00	30,677.00
<u>Stock and Common Funds</u>					
<u>Apache Corp.</u>					
04/23/09	425	Shs.	31,876.10	28,465.77	3,410.33
<u>Bank America Corp</u>					
04/22/09	1,750	Shs.	29,887.88	18,864.51	11,023.37
<u>Cisco Systems</u>					
04/23/09	2,100	Shs.	51,260.41	37,001.05	14,259.36
<u>CVS Caremark Corp</u>					
11/30/09	1,600	Shs.	63,816.49	51,072.44	12,744.05
<u>Dreyfus PR Large Cap Value Fund</u>					
04/17/09	28,711.654	Shs.	275,059.29	173,418.39	101,640.90
<u>Estee Lauder Companies Cl A</u>					
04/23/09	525	Shs.	21,631.88	14,374.13	7,257.75

Schedule B-1 (Cont'd)

			<u>Inventory Value</u>	<u>Proceeds</u>	<u>Decrease</u>
<u>Stock and Common Funds (Cont'd)</u>					
Ishares Russell 1000 Growth Index Fd					
11/30/09	3,350	Units	\$165,332.75	\$163,743.78	\$1,588.97
IShares Trust					
04/21/09	2,225	Shs.	123,741.90	90,844.41	32,897.49
News Corp.					
04/23/09	2,600	Shs.	37,624.34	22,821.17	14,803.17
3M Company					
04/23/09	400	Shs.	<u>32,420.00</u>	<u>20,805.46</u>	<u>11,614.54</u>
TOTAL SCHEDULE B-1			\$1,034,644.04 =====	\$760,011.11 =====	\$274,632.93 =====

ALMA G. DONCHIAN FOUNDATION MISSION STATEMENT AND GUIDELINES

Mission Statement:

It is the primary mission of the Alma Gibbs Donchian Foundation to provide assistance to various specified institutions in Castleton, Vermont and the immediate environs. Beyond that, the AGD Foundation hopes to address the following areas of concern:

1. Issues affecting the elderly, particularly those "middle-income" elderly not served by other programs;
2. Education, particularly as it addresses hearing and/or learning impairments, or reading disabilities; and
3. Programs or agencies engaged in the furtherance of fundamental values, such as: self-reliance, respect for tradition, the value of work, the importance of family, the innate 'goodness' and 'uniqueness' of all persons, and the satisfaction to be derived from religious or similarly uplifting beliefs.

Guiding Principles & Considerations

- The majority of the Foundation's grant making is focused in Vermont and the northeastern United States, although, occasionally, grants may be made in other regions of the country and/or abroad.
- All applicants must have tax-exempt 501(c)(3) status as a non-profit organization as defined by the Internal Revenue Service.
- Grants may range from a few thousand dollars up to \$25,000. In unique circumstances, the Foundation does consider a more significant grant for a program having a major impact in one or more of its areas of interest.
- Of particular interest to the Foundation are organizations that promote partnerships and collaborative efforts among multiple groups and organizations.
- The Foundation encourages pilot initiatives that test new program models.
- Priority will be given to requests that show specific plans for funding beyond the present.
- The applicant must have an active board of directors with policy-making authority. The board should demonstrate competence in the sound financial management of the organization.

Schedule B-3
DISTRIBUTIONS

	<u>Inventory Value</u>	<u>Distribution Value</u>
Calvin Coolidge Memorial Foundation, Inc P. O. Box 976 Plymouth Notch, CT 05056		
<u>06/16/09</u> Cash		
History Exploration Outreach Program	\$2,500.00	\$2,500.00
Total Distributions		
Calvin Coolidge Memorial Foundation, Inc P. O. Box 976 Plymouth Notch, CT 05056	\$2,500.00 =====	\$2,500.00 =====
 Camp Thorpe 680 Capen Hill Road Goshen, VT 05733		
<u>01/26/09</u> Cash		
Outdoor Pavillion	\$15,000.00	\$15,000.00
Total Distributions		
Camp Thorpe 680 Capen Hill Road Goshen, VT 05733	\$15,000.00 =====	\$15,000.00 =====
 Castleton Community Seniors, Inc. 2108 Main Street Castleton, VT 05735		
<u>06/09/09</u> Cash		
Fulfillment of 4-year pledge	\$25,000.00	\$25,000.00
11/05/09 Cash		
Barn Renovation	<u>5,000.00</u>	<u>5,000.00</u>
Total Distributions		
Castleton Community Seniors, Inc. 2108 Main Street Castleton, VT 05735	\$30,000.00 =====	\$30,000.00 =====

Schedule B-3 (Cont'd)

	<u>Inventory Value</u>	<u>Distribution Value</u>
Castleton State College Castleton, VT 05735		
06/09/09 Cash		
Academic Grove Portion of the Campus Beautification Project	<u>\$25,000.00</u>	<u>\$25,000.00</u>
Total Distributions		
Castleton State College		
Castleton, VT 05735	<u>\$25,000.00</u> =====	<u>\$25,000.00</u> =====
 Castleton Federated Church P.O. Box 57 Castleton, VT 05735		
01/28/09 Cash		
heating project	<u>\$5,000.00</u>	<u>\$5,000.00</u>
12/24/09 Cash		
Organization	<u>2,000.00</u>	<u>2,000.00</u>
Total Distributions		
Castleton Federated Church		
P.O. Box 57		
Castleton, VT 05735	<u>\$7,000.00</u> =====	<u>\$7,000.00</u> =====
 Clark School for the Deaf Round Hill Road Northampton, MA 01060		
06/16/09 Cash		
Donchian Future Directions Initiative & Operating Support	<u>\$20,000.00</u>	<u>\$20,000.00</u>
Total Distributions		
Clark School for the Deaf		
Round Hill Road		
Northampton, MA 01060	<u>\$20,000.00</u> =====	<u>\$20,000.00</u> =====

Schedule B-3 (Cont'd)

	<u>Inventory Value</u>	<u>Distribution Value</u>
Committee on Temporary Shelter 278 Main Street, P.O.Box 1616 Burlington, VT		
12/21/09 Cash		
General Purposes	<u>\$8,000.00</u>	<u>\$8,000.00</u>
Total Distributions		
Committee on Temporary Shelter 278 Main Street, P.O.Box 1616 Burlington, VT	<u>\$8,000.00</u> =====	<u>\$8,000.00</u> =====
Fish Food Banks of Gig Harbor 1224 S.I Street Tacoma, WA 98405		
12/09/09 Cash		
General Purposes	<u>\$5,000.00</u>	<u>\$5,000.00</u>
Total Distributions		
Fish Food Banks of Gig Harbor 1224 S.I Street Tacoma, WA 98405	<u>\$5,000.00</u> =====	<u>\$5,000.00</u> =====
Gallatin Valley Food Bank 602 Bond Street Bozeman, MT 59715		
12/09/09 Cash		
General Purposes	<u>\$5,000.00</u>	<u>\$5,000.00</u>
Total Distributions		
Gallatin Valley Food Bank 602 Bond Street Bozeman, MT 59715	<u>\$5,000.00</u> =====	<u>\$5,000.00</u> =====

Schedule B-3 (Cont'd)

	<u>Inventory Value</u>	<u>Distribution Value</u>
Greenwich Chaplaincy Services 70 Parsonage Road Greenwich, CT 06830		
12/09/09 Cash		
End of Life Care Resource	<u>\$10,000.00</u>	<u>\$10,000.00</u>
Total Distributions		
Greenwich Chaplaincy Services 70 Parsonage Road Greenwich, CT 06830	<u>\$10,000.00</u> =====	<u>\$10,000.00</u> =====
Island Harvest 199 2nd Street, #2 Mineola, NY 11501		
12/09/09 Cash		
General Purposes	<u>\$2,500.00</u>	<u>\$2,500.00</u>
Total Distributions		
Island Harvest 199 2nd Street, #2 Mineola, NY 11501	<u>\$2,500.00</u> =====	<u>\$2,500.00</u> =====
Killington Music Festival P. O. Box 386 Rutland, VT 05702		
04/08/09 Cash		
Community Student Outreach Concert Series	<u>\$5,000.00</u>	<u>\$5,000.00</u>
Total Distributions		
Killington Music Festival P. O. Box 386 Rutland, VT 05702	<u>\$5,000.00</u> =====	<u>\$5,000.00</u> =====

Schedule B-3 (Cont'd)

	<u>Inventory Value</u>	<u>Distribution Value</u>
Lupus Foundation of America 2000 L Street NW, Suite 710 Washington, DC 20036		
12/09/09 Cash		
General Purposes	<u>\$2,500.00</u>	<u>\$2,500.00</u>
Total Distributions		
Lupus Foundation of America 2000 L Street NW, Suite 710 Washington, DC 20036	<u>\$2,500.00</u> =====	<u>\$2,500.00</u> =====
 The Marshall Legacy Institute 2425 Wilson Blvd #313 Arlington, VA		
12/09/09 Cash		
MDD Program	<u>\$10,000.00</u>	<u>\$10,000.00</u>
Total Distributions		
The Marshall Legacy Institute 2425 Wilson Blvd #313 Arlington, VA	<u>\$10,000.00</u> =====	<u>\$10,000.00</u> =====
 Monadnock Area Food Bank 49 Concord Street, All Saints Parish Peterborough, NH 03458-1510		
12/09/09 Cash		
General Purposes	<u>\$5,000.00</u>	<u>\$5,000.00</u>
Total Distributions		
Monadnock Area Food Bank 49 Concord Street, All Saints Parish Peterborough, NH 03458-1510	<u>\$5,000.00</u> =====	<u>\$5,000.00</u> =====

Schedule B-3 (Cont'd)

	<u>Inventory Value</u>	<u>Distribution Value</u>
Mount Saint Joseph Academy 127 Convent Avenue Rutland, VT 05701		
04/08/09 Cash		
General Support	<u>\$25,000.00</u>	<u>\$25,000.00</u>
Total Distributions		
Mount Saint Joseph Academy 127 Convent Avenue Rutland, VT 05701	<u>\$25,000.00</u> =====	<u>\$25,000.00</u> =====
MT Ascutney Hospital Community Health Fdn, Inc.		
04/08/09 Cash		
Windsor Connection Resource Center	<u>\$5,000.00</u>	<u>\$5,000.00</u>
Total Distributions		
MT Ascutney Hospital Community Health Fdn, Inc.	<u>\$5,000.00</u> =====	<u>\$5,000.00</u> =====
Preservation Trust of Vermont 104 Church Street Burlington, VT 05401		
10/07/09 Cash		
General Purposes	<u>\$5,000.00</u>	<u>\$5,000.00</u>
Total Distributions		
Preservation Trust of Vermont 104 Church Street Burlington, VT 05401	<u>\$5,000.00</u> =====	<u>\$5,000.00</u> =====

Schedule B-3 (Cont'd)

	<u>Inventory Value</u>	<u>Distribution Value</u>
President Calvin Coolidge State Historical Site Plymouth Notch Historic District PO Box 247, Plymouth, VT 05056 04/08/09 Cash		
The Grace Coolidge Musicals	<u>\$2,200.00</u>	<u>\$2,200.00</u>
Total Distributions		
President Calvin Coolidge State Historical Site Plymouth Notch Historic District PO Box 247, Plymouth, VT 05056	<u>\$2,200.00</u> =====	<u>\$2,200.00</u> =====
St. Johnsbury Works P. O. Box 05819 St. Johnsbury, VT 05819 01/28/09 Cash		
St. Johnsbury Historical Walking Tour Audio Guide	<u>\$10,000.00</u>	<u>\$10,000.00</u>
Total Distributions		
St. Johnsbury Works P. O. Box 05819 St. Johnsbury, VT 05819	<u>\$10,000.00</u> =====	<u>\$10,000.00</u> =====
Stern Center 135 Allen Brook Lane Williston, VT 054956 04/08/09 Cash		
Building Blocks for Literacy Course	<u>\$5,000.00</u>	<u>\$5,000.00</u>
Total Distributions		
Stern Center 135 Allen Brook Lane Williston, VT 054956	<u>\$5,000.00</u> =====	<u>\$5,000.00</u> =====

Schedule B-3 (Cont'd)

	<u>Inventory Value</u>	<u>Distribution Value</u>
Vermont Council on the Humanities 200 Park Street Morrisville, VT 05661		
01/28/09 Cash		
Vermont Civil War Home Front Project	<u>\$10,000.00</u>	<u>\$10,000.00</u>
Total Distributions		
Vermont Council on the Humanities 200 Park Street Morrisville, VT 05661	<u>\$10,000.00</u> =====	<u>\$10,000.00</u> =====
 Vermont Foodbank 33 Parker Road Barre, VT 05670		
01/28/09 Cash		
General purposes	<u>\$5,000.00</u>	<u>\$5,000.00</u>
12/09/09 Cash		
General Operations	<u>10,000.00</u>	<u>10,000.00</u>
Total Distributions		
Vermont Foodbank 33 Parker Road Barre, VT 05670	<u>\$15,000.00</u> =====	<u>\$15,000.00</u> =====
 Vermont Land Trust 8 Bailey Avenue Montpelier, VT 05602		
06/16/09 Cash		
Farmland Access Program	<u>\$25,000.00</u>	<u>\$25,000.00</u>
Total Distributions		
Vermont Land Trust 8 Bailey Avenue Montpelier, VT 05602	<u>\$25,000.00</u> =====	<u>\$25,000.00</u> =====

Schedule B-3 (Cont'd)

	<u>Inventory Value</u>	<u>Distribution Value</u>
VT Museum & Gallery Alliance c/o Lake Champlain Maritime Museum <u>4472 Basin Harbor Rod, Vergennes, VT</u> 01/28/09 Cash Vermont Collections Care Program	<u>\$3,000.00</u>	<u>\$3,000.00</u>
Total Distributions VT Museum & Gallery Alliance c/o Lake Champlain Maritime Museum 4472 Basin Harbor Rod, Vergennes, VT	\$3,000.00 =====	\$3,000.00 =====
 <u>Woodstock Foundation, Inc.</u> 04/08/09 Cash Research & Publication of Howard Coffin's Civil War Book	 <u>\$5,000.00</u>	 <u>\$5,000.00</u>
Total Distributions Woodstock Foundation, Inc.	\$5,000.00 =====	\$5,000.00 =====
 <u>YWCA of Vermont, Inc.</u> 06/16/09 Cash YWCA Camp Hochelaga Girls' Summer Program	 <u>\$2,500.00</u>	 <u>\$2,500.00</u>
Total Distributions YWCA of Vermont, Inc.	\$2,500.00 =====	\$2,500.00 =====
 <u>Association of Small Foundations</u> 12/04/09 Cash General Purposes	 <u>\$500.00</u>	 <u>\$500.00</u>
Total Distributions Association of Small Foundations	\$500.00 =====	\$500.00 =====
 TOTAL SCHEDULE B-3	 \$265,700.00 =====	 \$265,700.00 =====

ALMA G. DONCHIAN FOUNDATION

SCHEDULED GRANTS - Approved for future payment

2010

Castleton Community Seniors, Inc.	\$ 25,000.00
Four year pledge	
Vermont Council on the Humanities	\$ 10,000.00
Vermont Civil War Home Front Project	
Vermont Foodbank	\$ 5,000.00
General purposes	
Vermont Land Trust	\$ 35,000.00
Farmland Access Program	
Woodstock Foundation Inc.	\$ 5,000.00
Research and publication of book on Civil War sites in Vermont	

2011

Vermont Land Trust	\$ 40,000.00
Farmland Access Program	
Woodstock Foundation Inc.	\$ 5,000.00
Research and publication of book on Civil War sites in Vermont	

TOTAL SCHEDULED GRANTS

\$ 125,000.00
