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Form **990****Return of Organization Exempt From Income Tax**

OMB No 1545-0047

2009Open to Public
InspectionDepartment of the Treasury
Internal Revenue ServiceUnder section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung
benefit trust or private foundation)

▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

A For the 2009 calendar year, or tax year beginning , 2009, and ending , 20

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type See Specific Instructions	C Name of organization <u>G WHITTEMORE TR FBO H WHITTEMORE LI</u>		D Employer identification number <u>06-6025602</u>
		Doing Business As		E Telephone number <u>203 578-2409</u>
		Number and street (or P O box if mail is not delivered to street address) Room/suite <u>123 BANK STREET</u>		G Gross receipts \$ <u>620,747.</u>
		City or town, state or country, and ZIP + 4 <u>WATERBURY, CT 06702</u>		H(a) Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list (see instructions)
F Name and address of principal officer:		H(c) Group exemption number ▶		
Tax-exempt status <u>501(c) ()</u> (insert no) <input checked="" type="checkbox"/> 4947(a)(1) or <u>527</u>		Website: ▶ <u>N/A</u>		
Form of organization: <input type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		L Year of formation <u>1932</u> M State of legal domicile: <u>NS</u>		

Part I Summary

1 Briefly describe the organization's mission or most significant activities: <u>MAINTENANCE OF PUBLIC LIBRARY</u>																																																									
2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.																																																									
3 Number of voting members of the governing body (Part VI, line 1a)	<u>1</u>																																																								
4 Number of independent voting members of the governing body (Part VI, line 1b)	<u>1</u>																																																								
5 Total number of employees (Part V, line 2a)	<u>5</u>																																																								
6 Total number of volunteers (estimate if necessary)	<u>6</u>																																																								
7a Total gross unrelated business revenue from Part VIII, column (C), line 12	<u>7a</u>																																																								
7b Net unrelated business taxable income from Form 990-T, line 34	<u>NONE</u>																																																								
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Part II Signature Block

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.	
	Signature of officer <u>Deborah A Dunne</u>	Date <u>05/03/2010</u>
Paid Preparer's Use Only	Preparer's signature <u>Thomson Reuters</u>	
	Date <u>05/03/2010</u>	Check if self-employed <input type="checkbox"/> Preparer's identifying number (see instructions) <u>P00260194</u>
Firm's name (or yours if self-employed), address, and ZIP + 4 <u>THOMSON REUTERS (TAX & ACCOUNTING)</u> <u>35 THOMSON PLACE, 1ST FLOOR; BOSTON, MA 02210</u>		EIN <u>75-1297386</u>
		Phone no <u>617-856-2811</u>

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Form **990** (2009)

Part III Statement of Program Service Accomplishments**1** Briefly describe the organization's mission:MAINTENANCE OF PUBLIC LIBRARY**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses.

Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: _____) (Expenses \$ 158,072. including grants of \$ 139,774.) (Revenue \$ _____)**4b** (Code: _____) (Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)**4c** (Code: _____) (Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)**4d** Other program services. (Describe in Schedule O.)

(Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4e Total program service expenses ► 158,072.

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors?		X
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II		X
5 Sections 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If "Yes," complete Schedule C, Part III		
6 Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III		X
9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV		X
10 Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V		X
11 Is the organization's answer to any of the following questions "Yes"? If so, complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable		X
• Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI.		
• Did the organization report an amount for investments other-securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII.		
• Did the organization report an amount for investments-program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII.		
• Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.		
• Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.		
• Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? If "Yes," complete Schedule D, Part X.		
12 Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI, XII, and XIII.		X
12A Was the organization included in consolidated, independent audited financial statement for the tax year?	Yes	No
If "Yes," completing Schedule D, Parts XI, XII, and XIII is optional.		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E.		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If "Yes," complete Schedule F, Part I		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If "Yes," complete Schedule F, Part II.		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If "Yes," complete Schedule F, Part III		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III		X
20 Did the organization operate one or more hospitals? If "Yes," complete Schedule H		X

Form 990 (2009)

Part IV Checklist of Required Schedules (continued)

	Yes	No
21 Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II.</i>	X	
22 Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III.</i>		X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J.</i>		X
24 a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If No, go to question 25.</i>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		X
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		X
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		X
25 a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I.</i>		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I.</i>		X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II.</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III.</i>		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i>		X
b A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i>		X
c An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV.</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M.</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M.</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I.</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II.</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I.</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1.</i>		X
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2.</i>		X
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2.</i>		
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI.</i>		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O.	X	

Form 990 (2009)

Part V Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable	0	
1b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.	0	
1c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		X
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	0	
2b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)		
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
3b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
b If Yes, enter the name of the foreign country: ▶ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.			
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
5c	If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?		X
6b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7 Organizations that may receive deductible contributions under section 170(c).			
7a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
7b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
7c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
7d	If "Yes," indicate the number of Forms 8282 filed during the year		
7e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
7f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
7g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		X
7h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		X
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		X
9 Sponsoring organizations maintaining donor advised funds.			
9a	Did the organization make any taxable distributions under section 4966?		X
9b	Did the organization make a distribution to a donor, donor advisor, or related person?		X
10	Section 501(c)(7) organizations. Enter:		
10a	Initiation fees and capital contributions included on Part VIII, line 12		
10b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
11	Section 501(c)(12) organizations. Enter:		
11a	Gross income from members or shareholders		
11b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		X
12b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year		

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Section A. Governing Body and Management

	Yes	No
a Enter the number of voting members of the governing body	1a 1	
1b Enter the number of voting members that are independent	1b 1	
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2	X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3	X
4 Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?	4	X
5 Did the organization become aware during the year of a material diversion of the organization's assets?	5	X
6 Does the organization have members or stockholders?	6	X
7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	7a	X
b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	7b	X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a The governing body?	8a X	
b Each committee with authority to act on behalf of the governing body?	8b	X
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9a	X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
10a Does the organization have local chapters, branches, or affiliates?	10a	X
b If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?	10b	
11 Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	11 X	
11A Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
12a Does the organization have a written conflict of interest policy? If "No," go to line 13	12a	X
b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	
c Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	12c	
13 Does the organization have a written whistleblower policy?	13	X
14 Does the organization have a written document retention and destruction policy?	14 X	
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a The organization's CEO, Executive Director, or top management official	15a	X
b Other officers or key employees of the organization	15b	X
If "Yes" to line 15a or 15b, describe the process in Schedule O. (See instructions.)		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	X
b If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ►Connecticut

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
☐ Own website ☐ Another's website ☒ Upon request

19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ►WEBSTER BANK, NA TEL: (203) 578-2409
123 BANK STREET; WATERBURY, CT 06702

[illegible]

1b Total	17,460	NONE	NONE
-----------------------	--------	------	------

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization ►

3 Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual.

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? *If "Yes," complete Schedule J for such person*

	Yes	No
3		X
4		X
5		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization.

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization ►

Part VIII Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, gifts, grants and other similar amounts	1a	Federated campaigns	1a				
	b	Membership dues	1b				
	c	Fundraising events	1c				
	d	Related organizations	1d				
	e	Government grants (contributions) . .	1e				
	f	All other contributions, gifts, grants, and similar amounts not included above .	1f				
	g	Noncash contributions included in lines 1a-1f: \$					
	h	Total. Add lines 1a-1f					
Program Service Revenue				Business Code			
	2a						
	b						
	c						
	d						
	e						
	f	All other program service revenue					
g	Total. Add lines 2a-2f						
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)			73,827.		73,827.
	4	Income from investment of tax-exempt bond proceeds . . .					
	5	Royalties					
		(i) Real	(ii) Personal				
	6a	Gross Rents					
	b	Less: rental expenses					
	c	Rental income or (loss)					
	d	Net rental income or (loss)					
		(i) Securities	(ii) Other				
	7a	Gross amount from sales of assets other than inventory		546,920			
	b	Less: cost or other basis and sales expenses		653,115			
	c	Gain or (loss)		-106,195			
	d	Net gain or (loss)			-106,195.		
	8a	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18		a			
	b	Less: direct expenses		b			
	c	Net income or (loss) from fundraising events					
	9a	Gross income from gaming activities. See Part IV, line 19		a			
	b	Less: direct expenses		b			
	c	Net income or (loss) from gaming activities					
	10a	Gross sales of inventory, less returns and allowances		a			
b	Less: cost of goods sold		b				
c	Net income or (loss) from sales of inventory						
Miscellaneous Revenue			Business Code				
11a							
b							
c							
d	All other revenue						
e	Total. Add lines 11a-11d						
12	Total Revenue. See instructions				-32,368.		73,827.

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21 . . .	139,774.	139,774.		
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	17,460.		17,460.	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . .				
7 Other salaries and wages				
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions) . . .				
9 Other employee benefits				
10 Payroll taxes				
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	282.		282.	
d Lobbying				
e Professional fundraising services See Part IV, line 17				
f Investment management fees				
g Other				
12 Advertising and promotion				
13 Office expenses				
14 Information technology				
15 Royalties				
16 Occupancy				
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization				
23 Insurance				
24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a -----				
b -----				
c -----				
d -----				
e -----				
f All other expenses -----	556.		556.	
25 Total functional expenses. Add lines 1 through 24f	158,072.	139,774.	18,298.	NONE
26 Joint Costs. Check here <input type="checkbox"/> If following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X Balance Sheet

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	51,898.	1	30,703.
	2 Savings and temporary cash investments		2	
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net		4	
	5 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges		9	
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D 10a			
	b Less: accumulated depreciation 10b		10c	
	11 Investments - publicly traded securities	2,556,669.	11	2,387,424.
	12 Investments - other securities. See Part IV, line 11		12	
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11		15	
16 Total assets. Add lines 1 through 15 (must equal line 34)	2,608,567.	16	2,418,127.	
Liabilities	17 Accounts payable and accrued expenses		17	
	18 Grants payable		18	
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities. Complete Part X of Schedule D		25	
	26 Total liabilities. Add lines 17 through 25	NONE	26	NONE
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets		27	
	28 Temporarily restricted net assets		28	
	29 Permanently restricted net assets		29	
	Organizations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds	2,383,616.	30	2,383,616.
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds	224,951.	32	34,511.
	33 Total net assets or fund balances	2,608,567.	33	2,418,127.
34 Total liabilities and net assets/fund balances	2,608,567.	34	2,418,127.	

Form **990** (2009)

Part XI Financial Statements and Reporting

	Yes	No
1 Accounting method used to prepare the Form 990: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant?	2a	X
b Were the organization's financial statements audited by an independent accountant?	2b	X
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	2c	
d If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a	X
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.	3b	

Form **990** (2009)

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

OMB No 1545-0047

2009

Open to Public
Inspection

Name of the organization

G WHITTEMORE TR FBO H WHITTEMORE LIBRARY, C/O

Employer identification number

06-6025602

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.

- 11 ☒ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.

a ☐ Type I b ☐ Type II c ☐ Type III - Functionally integrated d ☒ Type III - Other

- e ☒ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**.

- f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box ☐

- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?
- (ii) A family member of a person described in (i) above?
- (iii) A 35% controlled entity of a person described in (i) or (ii) above?

	Yes	No
11g(i)		<input checked="" type="checkbox"/>
11g(ii)		<input checked="" type="checkbox"/>
11g(iii)		<input checked="" type="checkbox"/>

- h Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col. (i) listed in your governing document?		(v) Did you notify the organization in col. (i) of your support?		(vi) Is the organization in col. (i) organized in the U.S.?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
SEE STATEMENT 1									
Total									

For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2009

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**
(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

N/A

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f).						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2008 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test - 2009. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 33 1/3% support test - 2008. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
17a 10%-facts-and-circumstances test - 2009. If the organization did not check a box on line 13, 16a or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 10%-facts-and-circumstances test - 2008. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions		<input type="checkbox"/>

Schedule A (Form 990 or 990-EZ) 2009

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I.)

N/A

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						
14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2008 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2009. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ► ☐

b 33 1/3% support tests - 2008. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ► ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ► ☐

Part IV **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Provide any other additional information. See instructions.

[illegible]

**SCHEDULE O
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization

Supplemental Information to Form 990

Complete to provide information for responses to specific questions on
Form 990 or to provide any additional information.
▶ Attach to Form 990.

OMB No 1545-0047

2009

**Open to Public
Inspection**

Employer identification number

G WHITTEMORE TR FBO H WHITTEMORE LIBRARY, C/O

06-6025602

PAGE 6, PART VI, LINE 8a: WEBSTER BANK IS THE TRUSTEE AND KEEPS

TRACK OF MEETINGS WITH THE LIBRARY.

PAGE 6, PART VI, LINE 10: 990 PROVIDED TO THE BANK PRIOR TO FILING

WITH IRS.

PAGE 6, PART VI, LINE 14: BANK AS TRUSTEE HAS DOCUMENT RETENTION

POLICY.

EXPLANATION FOR FORM 990, PAGE 6, PART VI, LINE 1a

N/A

FORM 990, PAGE 6, PART VI, LINE 11-DESCRIPTION OF PROCESS FOR REVIEW

MAILED TO CLIENT FOR REVIEW

DESCRIPTION FOR MAKING DOCUMENTS PUBLIC

FORM 990, PAGE 6, PART VI, LINE 19

N/A

CHANGE IN COMMITTEE OVERSIGHT REVIEW FROM PRIOR YEAR

FORM 990, PAGE 11, PART 11, LINE 2

N/A

EXPLANATION FOR FORM 990, PAGE 11, PART 11, LINE 3b

N/A

SCHEDULE A, PART I (h) - INFORMATION ABOUT SUPPORTED ORGANIZATIONS
=====

NAME OF SUPPORTED ORGANIZATION:

NAUGATUCK PUBLIC LIBRARY

EIN: 06-0646963

TYPE OF ORGANIZATION FROM PART I: 6

IS THE ORGANIZATION LISTED IN GOVERNING DOCUMENT?: YES

DID YOU NOTIFY THE ORGANIZATION OF YOUR SUPPORT?: YES

IS THE ORGANIZATION ORGANIZED IN THE U.S.?: YES

AMOUNT OF SUPPORT: 139,774.

TOTAL SUPPORT:

139,774.
=====

SCH I, PART II - GRANTS AND OTHER ASSISTANCE TO ORG'S INSIDE THE US

NAME OF ORGANIZATION:

HOWARD WHITTEMORE MEMORIAL LIBRARY

ADDRESS:

243 CHURCH STREET

NAUGATUCK, CT 06770

AMOUNT OF CASH GRANT..... 139,774.

TOTAL CASH GRANTS..... 139,774.

=====

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ **Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).**

OMB No. 1545-0092

2009

Name of estate or trust

G WHITTEMORE TR FBO H WHITTEMORE LIBRARY, C/O

Employer identification number

06-6025602

Note: Form 5227 filers need to complete *only* Parts I and II.

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example: 100 shares 7% preferred of "Z" Co.)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a SHORT-TERM CAPITAL GAIN DIVIDENDS		STMT 1			16.

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	-20,825.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet	4	()
5 Net short-term gain or (loss). Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back ▶	5	-20,809.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example: 100 shares 7% preferred of "Z" Co.)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	-85,386.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9 Capital gain distributions	9	
10 Gain from Form 4797, Part I	10	
11 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet	11	()
12 Net long-term gain or (loss). Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back ▶	12	-85,386.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2009

Part III Summary of Parts I and II		(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
Caution: Read the instructions before completing this part.				
13	Net short-term gain or (loss)	13		-20,809.
14	Net long-term gain or (loss):			
a	Total for year	14a		-85,386.
b	Unrecaptured section 1250 gain (see line 18 of the wrksh.)	14b		
c	28% rate gain	14c		
15	Total net gain or (loss). Combine lines 13 and 14a ▶	15		-106,195.

Note: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation	
16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of:
a	The loss on line 15, column (3) or b \$3,000
16	(3,000)

Note: If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 7 of the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the worksheet on page 8 of the instructions if:

- Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34) . . .	17	
18	Enter the smaller of line 14a or 15 in column (2) but not less than zero	18	
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T) . .	19	
20	Add lines 18 and 19	20	
21	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- . . ▶	21	
22	Subtract line 21 from line 20. If zero or less, enter -0-	22	
23	Subtract line 22 from line 17. If zero or less, enter -0-	23	
24	Enter the smaller of the amount on line 17 or \$2,300	24	
25	Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> Yes. Skip lines 25 and 26; go to line 27 and check the "No" box. <input type="checkbox"/> No. Enter the amount from line 23	25	
26	Subtract line 25 from line 24	26	
27	Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> Yes. Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> No. Enter the smaller of line 17 or line 22	27	
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)	28	
29	Subtract line 28 from line 27	29	
30	Multiply line 29 by 15% (.15)	30	
31	Figure the tax on the amount on line 23. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	31	
32	Add lines 30 and 31	32	
33	Figure the tax on the amount on line 17. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	33	
34	Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	34	

Schedule D (Form 1041) 2009

Continuation Sheet for Schedule D
(Form 1041)

OMB No 1545-0092

2009

▶ See instructions for Schedule D (Form 1041).

▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

Name of estate or trust

G WHITTEMORE TR FBO H WHITTEMORE LIBRARY, C/O

Employer identification number

06-6025602

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

[illegible]

1b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 1b	-20,825.00
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For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D-1 (Form 1041) 2009

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side

Employer identification number

G WHITTEMORE TR FBO H WHITTEMORE LIBRARY, C/O

06-6025602

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 sh. 7% preferred of "Z" Co.)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 289. CVS CORP	01/05/2007	09/30/2009	10,314.00	8,945.00	1,369.00
600. CHESAPEAKE ENERGY CORP	07/10/2007	04/27/2009	11,839.00	21,282.00	-9,443.00
22. DANAHER CORP	01/05/2007	09/30/2009	1,469.00	1,566.00	-97.00
38. DIAGEO PLC ADR	01/26/2007	09/30/2009	2,327.00	2,987.00	-660.00
691. WALT DISNEY COMPANY	01/05/2007	03/05/2009	10,961.00	23,514.00	-12,553.00
1023.018 DODGE & COX INTL STOCK FUND	01/05/2007	01/29/2009	20,000.00	44,507.00	-24,507.00
19. DOMINION RES INC VA NEW	12/14/2006	09/30/2009	651.00	787.00	-136.00
1371. E M C CORP MASS	01/05/2007	05/20/2009	16,262.00	18,655.00	-2,393.00
26. EXELON CORP	01/05/2007	09/30/2009	1,281.00	1,570.00	-289.00
403.408 FIDELITY SOUTHEAST ASIA FUND	12/07/2007	01/29/2009	6,959.00	11,089.00	-4,130.00
473. FOREST LABS INC	01/15/2008	09/11/2009	13,698.00	17,894.00	-4,196.00
50000. GEN ELEC CAP CRP MTN 5.250% 10/27/09	10/02/2008	10/27/2009	50,000.00	50,000.00	
3. ITT INDS INC IND	08/05/2008	09/30/2009	155.00	202.00	-47.00
14. JOHNSON & JOHNSON	01/05/2007	09/30/2009	844.00	934.00	-90.00
43. PEPSICO INC	01/05/2007	05/20/2009	2,245.00	2,712.00	-467.00
16. PEPSICO INC	01/05/2007	09/30/2009	929.00	1,009.00	-80.00
38. PHILIP MORRIS INTERNATIONAL	01/26/2007	09/30/2009	1,821.00	1,748.00	73.00
458. POWERSHARES DYN BIOTECH & GENO	12/13/2006	09/30/2009	7,737.00	8,485.00	-748.00
29. PROCTOR & GAMBLE COMPANY	12/13/2006	05/20/2009	1,583.00	1,853.00	-270.00
22. PROCTOR & GAMBLE COMPANY	12/13/2006	09/30/2009	1,267.00	1,405.00	-138.00
500. SCHERING-PLOUGH CORP	09/25/2007	03/23/2009	11,951.00	15,939.00	-3,988.00
500. SCHERING-PLOUGH CORP	10/22/2007	04/29/2009	11,300.00	14,535.00	-3,235.00
313. STRYKER CORP COM	01/05/2007	09/30/2009	14,095.00	17,481.00	-3,386.00
45. TARGET CORP	12/14/2006	09/30/2009	2,092.00	2,664.00	-572.00
114. TEVA PHARMACEUTICAL INDS LTD ADR	01/05/2007	09/30/2009	5,738.00	4,103.00	1,635.00

6b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 6b

Schedule D-1 (Form 1041) 2009

Employer identification number

06-6025602

[illegible]

6b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 6b	-85,386.00
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JSA

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WTC983800

7

FEDERAL CAPITAL GAIN DIVIDENDS

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SHORT-TERM CAPITAL GAIN DIVIDENDS

T ROWE PRICE MID CAP GROWTH FD #64

16.00

TOTAL SHORT-TERM CAPITAL GAIN DIVIDENDS

16.00

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G. WHITTEMORE TR FBO H WHITTEMORE LI
ACCOUNT: WTC983800

LIST OF ASSETS

PAGE: 2

AS OF 12/31/09

+	PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
	CASH EQUIVALENTS					
+						
	30,703.3100	WEBSTER BANK MONEY MARKET/PT	30,703.31	30,703.31	1.000	0
	U.S. TREASURY OBLIGATIONS					
+						
	85,000.0000	UNITED STATES TREASURY NOTES DTD 08/15/2001 5.000% 08/15/2011	91,300.18	90,631.25	106.625	0
	70,000.0000	UNITED STATES TREASURY NOTES DTD 08/15/2002 4.375% 08/15/2012	67,487.39	75,310.20	107.586	0
	55,000.0000	UNITED STATES TREASURY NOTES DTD 11/15/2002 4.000% 11/15/2012	52,713.23	58,751.00	106.820	0
	50,000.0000	UNITED STATES TREASURY NOTES DTD 08/15/2003 4.250% 08/15/2013	48,601.77	53,953.00	107.906	0
+	TOTAL U.S. TREASURY OBLIGATIONS		260,102.57	278,645.45		0
	U.S. GOVERNMENT AGENCIES					
+						
	50,000.0000	FEDERAL HOME LOAN BANK DTD 02/05/2007 5.000% 03/12/2010 NON CALLABLE	49,825.50	50,453.00	100.906	0
	50,000.0000	FEDERAL FARM CREDIT BANK DTD 06/06/2007 5.125% 06/06/2011 NON CALLABLE	50,000.00	52,953.00	105.906	0
	50,000.0000	FEDERAL HOME LOAN BANK DTD 07/23/2003 VAR CPN 07/23/2013 CALLABLE	49,772.00	54,765.50	109.531	0
+	TOTAL U.S. GOVERNMENT AGENCIES		149,597.50	158,171.50		0

G. WHITTEMORE TR FBO H WHITTEMORE LI
ACCOUNT: WTC983800

LIST OF ASSETS

AS OF 12/31/09

PAGE: 3

PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
CORPORATE & FOREIGN BONDS					
33,000.0000	TEXTRON FINANCIAL CORP MEDIUM TERM NOTE DTD 04/28/2005 4.600% 05/03/2010 NON CALLABLE	32,953.59	32,991.42	99.974	0
50,000.0000	JACKSON NATL LIFE GLOBAL DTD 02/10/2006 5.125% 02/10/2011 NON CALLABLE	49,868.50	50,407.00	100.814	0
50,000.0000	INTL LEASE FINANCE CORP MEDIUM TERM NOTE DTD 04/24/2007 5.300% 05/01/2012 NON CALLABLE	49,765.00	42,471.00	84.942	0
50,000.0000	WELLS FARGO CORPORATION DTD 09/05/2002 5.125% 09/01/2012	49,991.50	52,571.50	105.143	0
50,000.0000	BOEING COMPANY DTD 02/11/2003 5.125% 02/15/2013 NON CALLABLE	49,952.50	53,442.50	106.885	0
50,000.0000	MORGAN STANLEY DTD 02/26/2003 5.300% 03/01/2013 NON CALLABLE	48,934.00	52,700.00	105.400	0
50,000.0000	CHUBB CORP DTD 10/01/2003 5.200% 04/01/2013 NON CALLABLE	49,620.00	52,757.00	105.514	0
50,000.0000	GOLDMAN SACHS GROUP INC DTD 10/14/2003 5.250% 10/15/2013 NON CALLABLE	49,917.00	53,100.50	106.201	0

G. WHITEMORE TR FBO H WHITEMORE LI
ACCOUNT: WTC983800

LIST OF ASSETS

PAGE: 4

AS OF 12/31/09

PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
50,000.0000	DOW CHEMICAL COMPANY MEDIUM TERM NOTE DTD 10/02/2008 6.500% 10/15/2015 CALLABLE	50,000.00	49,983.00	99.966	0
50,000.0000	GENERAL ELEC CAP CORP MEDIUM TERM NOTE DTD 12/17/2009 4.850% 12/15/2018 NON CALLABLE	50,000.00	48,141.00	96.282	0
+ TOTAL CORPORATE & FOREIGN BONDS		481,002.09	488,564.92		0
COMMON EQUITY SECURITIES					
417.0000	ABBOTT LABS INC	18,628.56	22,513.83	53.990	0
733.0000	AMERICAN CAPITAL LTD	25,390.11	1,788.52	2.440	0
545.0000	AMPHENOL CORP	19,546.10	25,168.10	46.180	0
218.0000	APPLE INC	29,701.76	45,939.58	210.732	0
1,000.0000	BANK OF AMERICA CORP COM	11,600.00	15,060.00	15.060	0
150.0000	BLACKROCK INC CLASS A	26,721.45	34,830.00	232.200	0
531.0000	CHEVRON CORPORATION	38,776.70	40,881.69	76.990	0
1,091.0000	CISCO SYSTEMS INC	30,112.58	26,118.54	23.940	0
710.0000	CVS CAREMARK CORP	21,763.00	22,869.10	32.210	0

G. WHITTEMORE TR FBO H WHITTEMORE LI
ACCOUNT: WTC983800

LIST OF ASSETS

AS OF 12/31/09

PAGE: 5

PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
321.0000	DANAHER CORP	21,603.93	24,139.20	75.200	0
318.0000	DIAGEO PLC AMERICAN DEPOSITORY RECEIPT	24,835.90	22,072.38	69.410	0
321.0000	DOMINION RES INC VA	12,879.74	12,493.32	38.920	0
321.0000	EXELON CORP	18,809.19	15,687.27	48.870	0
443.0000	EXXON MOBIL CORP	24,022.84	30,208.17	68.190	0
1,849.0000	GENERAL ELECTRIC CORP	36,960.08	27,975.37	15.130	0
362.0000	GILEAD SCIENCES INC	16,694.55	15,663.74	43.270	0
400.0000	HEWLETT PACKARD CO	18,051.24	20,604.00	51.510	0
884.0000	INGERSOLL-RAND PLC	19,274.20	31,594.16	35.740	0
273.0000	INTL. BUSINESS MACHINES CORP	24,010.19	35,735.70	130.900	0
398.0000	ISHARES DOW JONES US OIL AND GAS EXPLORATION AND PRODUCTION INDEX FUND	17,871.22	21,488.02	53.990	0
321.0000	ISHARES S&P GLOBAL MATERIALS INDEX FUND	15,290.57	19,972.62	62.220	0
281.0000	ITT CORPORATION	18,891.63	13,976.94	49.740	0
486.0000	JOHNSON & JOHNSON	32,185.38	31,303.26	64.410	0
975.0000	JP MORGAN CHASE & CO	27,199.01	40,628.25	41.670	0

G. WHITEMORE TR FBO H WHITEMORE LI
ACCOUNT: WTC983800

LIST OF ASSETS

AS OF 12/31/09

PAGE: 6

+	PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
	454.0000	KRAFT FOODS INC	9,597.56	12,339.72	27.180	0
	161.0000	LOCKHEED MARTIN CORP	15,682.09	12,131.35	75.350	0
	300.0000	MEDCO HEALTH SOLUTIONS INC	12,660.00	19,173.00	63.910	0
	267.0000	METLIFE INC	10,203.35	9,438.45	35.350	0
	727.0000	MICROSOFT CORP	20,580.28	22,158.96	30.480	0
	354.0000	NOBLE CORP	12,769.59	14,407.80	40.700	0
	909.0000	ORACLE CORPORATION COM	19,474.29	22,297.77	24.530	0
	780.0000	PEOPLES UNITED FINANCIAL, INC	13,192.02	13,026.00	16.700	0
	454.0000	PEPSICO INC	28,568.51	27,603.20	60.800	0
	1,206.0000	PETSMART INC	32,896.67	32,188.14	26.690	0
	1,390.0000	PFIZER INC	19,312.95	25,284.10	18.190	0
	318.0000	PHILIP MORRIS INTERNATIONAL	7,678.70	15,324.42	48.190	0
	1,042.0000	POWERSHARES DYNAMIC BIOTECHNOLOGY & GENOME PORTFOLIO	18,837.60	17,349.30	16.650	0
	378.0000	PROCTER & GAMBLE COMPANY	23,143.45	22,918.14	60.630	0
	473.0000	SMITH INTERNATIONAL INC	18,226.02	12,851.41	27.170	0
	469.0000	STRYKER CORP COM	21,606.61	23,623.53	50.370	0

G. WHITTEMORE TR FBO H WHITTEMORE L1
ACCOUNT: WTC983800

LIST OF ASSETS

AS OF 12/31/09

PAGE: 7

PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
643.0000	TARGET CORP	37,298.65	31,101.91	48.370	0
486.0000	TEVA PHARMACEUTICAL INDS LTD AMERICAN DEPOSITORY RECEIPT	15,657.57	27,303.48	56.180	0
300.0000	TRAVELERS COMPANIES INC	11,787.57	14,958.00	49.860	0
402.0000	UNITED TECHNOLOGIES CORP	28,195.40	27,902.82	69.410	0
289.0000	VANGUARD MATERIALS ETF	22,076.71	19,599.98	67.820	0
522.0000	VERIZON COMMUNICATIONS	17,940.36	17,293.86	33.130	0
804.0000	WINDSTREAM CORP	9,639.60	8,835.96	10.990	0
+ TOTAL COMMON EQUITY SECURITIES		977,845.48	1,047,823.06		0
DOMESTIC EQUITY MUTUAL FUNDS					
6,919.1610	ROYCE PENNSYLVANIA MUTUAL FUND	78,970.22	65,386.07	9.450	0
720.6210	STRATTON SMALL-CAP VALUE FUND	34,828.32	29,091.47	40.370	0
620.2910	T ROWE PRICE MID-CAP GROWTH FD #64	23,016.12	29,457.62	47.490	0
1,465.9010	T ROWE PRICE MID-CAP VALUE FD INC	23,000.00	30,373.47	20.720	0
+ TOTAL DOMESTIC EQUITY MUTUAL FUNDS		159,814.66	154,308.63		0
INTL EQUITY MUTUAL FUNDS					
2,288.5610	DODGE & COX INTERNATIONAL STOCK FUND	89,627.63	72,890.67	31.850	0

G. WHITTEMORE TR FBO H WHITTEMORE LI
ACCOUNT: WTC983800

LIST OF ASSETS

PAGE: 8

AS OF 12/31/09

	PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
+						
	2,447.0070	FIDELITY DIVERSIFIED INTERNATIONAL FUND	89,917.48	68,516.20	28.000	0
	2,412.6410	SCOUT INTERNATIONAL FUND	84,161.97	70,304.36	29.140	0
+		TOTAL INTL EQUITY MUTUAL FUNDS	263,707.08	211,711.23		0
		CLOSED END EQUITY MUTUAL FUND				
+						
	643.0000	ISHARES MSCI CANADA INDEX FUND	13,593.35	16,930.19	26.330	0
	161.0000	ISHARES MSCI EAFE INDEX FUND	8,454.05	8,900.08	55.280	0
	1,511.0000	ISHARES MSCI EMERGING MARKETS INDEX	62,744.38	62,706.50	41.500	0
+		TOTAL CLOSED END EQUITY MUTUAL FUND	84,791.78	88,536.77		0
		CLOSED-END FIXED INCOME				
+						
	1,500.0000	ABERDEEN ASIA PACIFIC PRIME INCOME FUND, INC.	9,464.70	9,324.75	6.217	0
		CASH EQUIVALENTS				
+						
	1,097.6600	WEBSTER BANK MONEY MARKET/PT	1,097.66	1,097.66	1.000	0
+		TOTAL ASSETS	2,418,126.83	2,468,887.28		0