

# See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490



OMB No 1545-0052

Department of the Treasury Internal Revenue Service

#### **Return of Private Foundation** or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

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

2009

For	cale	ndar year 2009, or tax y	ear beginning 01-	01-2009 , and	dend	ding 12-31-	2009	
G	Che	ck all that apply Finitial	_	turn of a former publ			al return	
Use	the I label.	Name of foundation					entification numbe	er
o	herwis print r type Speci	Number and street (or P O box PO Box 7266	number if mail is not delivere	B Telephone number (see page 10 of the ins suite (203) 761-1150				
	tructio		de	·		•	application is pending	
		pe of organization	ble trust Cother taxa	ble private foundatio		check her	rganizations meeting e and attach comput	ation
ofy	ear <i>(fi</i>	et value of all assets at end rom Part II, col. (c), \$ 8,010,455	Accounting method Other (specify) (Part I, column (d) must	_	ual	under sectio  F If the foundation	indation status was t n 507(b)(1)(A), chec ation is in a 60-montl n 507(b)(1)(B), chec	k here F
Ра	rt I	Analysis of Revenue a total of amounts in columns (b), (onecessarily equal the amounts in other instructions)	and Expenses (The c), and (d) may not	(a) Revenue and expenses per books	(b) l	Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc , rece	ıved (attach schedule)					
	2	Check ► 🔽 if the foundation is <b>not</b>	required to attach Sch B					
	3	Interest on savings and tempo	rary cash investments	100		100		
	4	Dividends and interest from se	curities	152,576		152,576		
	5a	Gross rents		114,010		114,010		
	ь	Net rental income or (loss)	114,010					
Φ	6a	Net gain or (loss) from sale of	assets not on line 10	-422,680				
릁	ь	Gross sales price for all assets on line	6a <u>2,082,548</u>					
Reveilue	7	Capital gain net income (from	Part IV , line 2)			0		
~	8	Net short-term capital gain .						
	9	Income modifications						
	10a	Gross sales less returns and allowand	es					
	ь	Less Cost of goods sold						
	С	Gross profit or (loss) (attach s	chedule)					
	11	Other income (attach schedule	•			15,427		
	12	<b>Total.</b> Add lines 1 through 11		-140,567		282,113		
	13	Compensation of officers, direc	•	108,000		27,000		81,000
ys di	14	Other employee salaries and v	3					
Š	15	Pension plans, employee bene		<b>05</b>		20.020		
Expenses		Legal fees (attach schedule).				39,020		0
		Accounting fees (attach sched		24,770		12,385		12,385
₹		Other professional fees (attac	h schedule)	53,899		32,774		21,125
and Administrative		Interest		<b>65</b> 0.024		0.024		0
<u> </u>	18	Taxes (attach schedule) (see page 1	,	8,034		8,034		0
<u>Ē</u>	19	Depreciation (attach schedule		556				0.427
Ă	20	• •		11,250		2,813		8,437
Ē		Travel, conferences, and meet Printing and publications	_					
	22	Other expenses (attach sched		<b>%</b> 8,773		4,387		4,386
ğt III	23	Total operating and administra		<b>6</b> 0,773		4,307		7,300
Operating	24	Add lines 13 through 23	•	254,302		126,413		127,333
ŏ	25	Contributions, gifts, grants pai		311,517		120,713		311,517
	26	Total expenses and disbursemen		565,819		126,413		438,850
	27	Subtract line 26 from line 12	EST AND THES 27 DIN 23	555,313				,.30
	a	Excess of revenue over expens	ses and disbursements	-706,386				
	b	Net investment income (if neg		. 55,500		155,700		
	c	Adjusted net income (if negati						
			,					

Da.	rt II	Balance Sheets Attached schedules and amounts in the description column	Beginning of year			nd of	year
		Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book		025	(c) Fair Market Value
	1	Cash—non-interest-bearing	71,986		170,	-	170,836
	2	Savings and temporary cash investments	231,867		101,	454	101,454
	3	Accounts receivable 3,561					
		Less allowance for doubtful accounts 🟲			3,	561	3,561
	4	Pledges receivable -					
		Less allowance for doubtful accounts 🟲				_	
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other					
		disqualified persons (attach schedule) (see page 15 of the					
		ınstructions)					
	7	Other notes and loans receivable (attach schedule)					
		Less allowance for doubtful accounts 🟲					
2 <del>6</del> 12	8	Inventories for sale or use				-	
ζ. (	9	Prepaid expenses and deferred charges				$\dashv$	
₹	9 10a	Investments—U S and state government obligations (attach schedule)				-	
	_	Investments—corporate stock (attach schedule)	6,125,806	<b>4</b> €	5,447,	978	5,403,310
	b	· · · · · · · · · · · · · · · · · · ·	0,123,000	729°	3,447,		3,403,310
		Investments—corporate bonds (attach schedule)				-	
	11	Investments—land, buildings, and equipment basis 1,770,000	1 770 000	o <b>⊊</b> ∃	1 770		2 220 200
		Less accumulated depreciation (attach schedule)	1,770,000	729	1,770,	000	2,330,200
	12	Investments—mortgage loans				_	
	13	Investments—other (attach schedule)				_	
	14	Land, buildings, and equipment basis 7,344	1.650	o <b>s</b> al	4	00.4	1.004
		Less accumulated depreciation (attach schedule) • 6,250	1,650	759	1,	094	1,094
	15	Other assets (describe)				_	
	16	Total assets (to be completed by all filers—see the					
		instructions Also, see page 1, item I)	8,201,309		7,494,	923	8,010,455
	17	Accounts payable and accrued expenses					
	18	Grants payable					
Ψ.	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
8	21	Mortgages and other notes payable (attach schedule)					
-	22	Other liabilities (describe 🟲)					
			0				
	23	Total liabilities (add lines 17 through 22)	0			$\dashv$	
		Foundations that follow SFAS 117, check here					
ر م		and complete lines 24 through 26 and lines 30 and 31.					
or Fund Balances	24	Unrestricted				_	
<u> </u>	25	Temporarily restricted				_	
<u>,                                    </u>	26	Permanently restricted					
ĭ		Foundations that do not follow SFAS 117, check here					
로		and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds	7,675,503		7,675,	503	
Assets	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0			0	
Š	29	Retained earnings, accumulated income, endowment, or other funds	525,806		-180,	580	
	30	Total net assets or fund balances (see page 17 of the					
₹		instructions)	8,201,309		7,494,	923	
	31	Total liabilities and net assets/fund balances (see page 17 of					
		the instructions)	8,201,309		7,494,	923	
Pa	rt II	Analysis of Changes in Net Assets or Fund Balances					
			/a) line 20 /	araa			
1		Total net assets or fund balances at beginning of year—Part II, column		_			0.204.202
_		, , , , , , , , , , , , , , , , , , , ,			1		8,201,309
2		Enter amount from Part I, line 27a			2		-706,386
3		Other increases not included in line 2 (itemize)			3		7 404 022
4		Add lines 1, 2, and 3			4		7,494,923
5		Decreases not included in line 2 (itemize)			5		7 101 022
6		Total net assets or fund balances at end of year (line 4 minus line 5)—F	art 11, column (b), li	ne 30	6		7,494,923

1 a	2-Story brick warehou	ne kınd(s) of property sold (e g , re use, or common stock, 200 shs M		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr )	(d) Date sold (mo , day, yr )
_	Publicly Traded Securit	iles		Р		
ь						
С						
d						
e					<u> </u>	
(e	e) Gross sales price	(f) Depreciation allowed (or allowable)	1 107	t or other basis xpense of sale	(e) plus (f	or (loss) ) minus (g)
а	2,082	.,548		2,505,22	8	-422,68
b					_	
С						
d						
е						
Со	omplete only for assets sh	owing gain in column (h) and owne			<b>—</b>	(h) gain minus
(i)	FM V as of 12/31/69	(j) Adjusted basis as of 12/31/69	, , ,	cess of col (1) col (j), If any		less than -0-) <b>or</b> om col (h))
a		43 01 12/31/03	0,00	(3), 11 4119		-422,68
 b						,
c		<del></del>				
d						
e			If any plan antar	un Dort I line 7 Ì		
2	Capital gain net income		If gain, also enter If (loss), enter -0-			422.60
_	Not also the sum as a second	Ĺ		J	2	-422,68
3	·	gain or (loss) as defined in section			,	
	If gain, also enter in Pa If (loss), enter -0- in Pa	rt I, line 8, column (c) (see pages	13 and 17 of the	instructions)	}	
		art I, line 8 ider Section 4940(e) for R		· · · ·	J  3	
Was the		ave this part blank section 4942 tax on the distribute qualify under section 4940(e) Do		year in the bace n		
1 Fn	tar the appropriate amoun		not complete this		eriod?	Γ Yes <b>Γ</b> No
	iter the appropriate amoun	it in each column for each year, se		part		│ Yes 🔽 No
Base	(a) e period years Calendar			part nstructions before		n ratio
Base	(a)	nt in each column for each year, se	ee page 18 of the i	part nstructions before	makıng any entries (d) Distributio	n ratio I by col (c))
Base	(a) e period years Calendar or tax year beginning in)	nt in each column for each year, se  (b)  Adjusted qualifying distributions	ee page 18 of the i	part nstructions before ) intable-use assets	makıng any entries (d) Distributio	n ratio I by col (c)) 0 052266
Base	(a) e penod years Calendar or tax year beginning in) 2008	(b) Adjusted qualifying distributions 438,430	ee page 18 of the i	part nstructions before nstructions before nstructions before 8,388,358	makıng any entries (d) Distributio	n ratio I by col (c)) 0 052266 0 050560
Base	(a) e penod years Calendar or tax year beginning in) 2008 2007 2006	(b) Adjusted qualifying distributions  438,430 492,324 521,026 638,649	ee page 18 of the i	part  nstructions before  nintable-use assets  8,388,358  9,737,432  9,430,100  9,336,651	makıng any entries (d) Distributio	n ratio I by col (c)) 0 052266 0 050560 0 055251 0 068402
Base	(a) e period years Calendar or tax year beginning in) 2008 2007 2006	(b) Adjusted qualifying distributions  438,430 492,324 521,026	ee page 18 of the i	part  nstructions before  nritable-use assets  8,388,358  9,737,432  9,430,100	makıng any entries (d) Distributio	n ratio
Base year (	(a) e penod years Calendar or tax year beginning in) 2008 2007 2006 2005	(b) Adjusted qualifying distributions  438,430 492,324 521,026 638,649 295,389	(c)	part  nstructions before  nitable-use assets  8,388,358  9,737,432  9,430,100  9,336,651  8,727,105	making any entries (d) Distributio (col (b) divided	n ratio 1 by col (c)) 0 052266 0 050560 0 055251 0 068402 0 033847
Base year (d	(a) e penod years Calendar or tax year beginning in) 2008 2007 2006 2005 2004  Total of line 1, column (	(b) Adjusted qualifying distributions  438,430 492,324 521,026 638,649 295,389	ee page 18 of the I	9,430,100 9,336,651 8,727,105	makıng any entries (d) Distributio	n ratio 1 by col (c)) 0 052266 0 050560 0 055251 0 068402 0 033847
Base year (	(a) e period years Calendar or tax year beginning in) 2008 2007 2006 2005 2004  Total of line 1, column ( A verage distribution rai	(b) Adjusted qualifying distributions  438,430 492,324 521,026 638,649 295,389	Net value of noncha	9,430,100 9,336,651 8,727,105	making any entries (d) Distributio (col (b) divided	n ratio   by col (c)     0 052266
Base year (d	(a) e period years Calendar or tax year beginning in)  2008  2007  2006  2005  2004  Total of line 1, column ( A verage distribution rathe number of years the	(b) Adjusted qualifying distributions  438,430 492,324 521,026 638,649 295,389  (d)	Net value of noncha	nstructions before  nstructions before  8,388,358 9,737,432 9,430,100 9,336,651 8,727,105	making any entries  (d)  Distributio  (col (b) divided	n ratio l by col (c))  0 052266 0 050560 0 055251 0 068402 0 033847  0 26032
Base year (d	(a) e period years Calendar or tax year beginning in)  2008  2007  2006  2005  2004  Total of line 1, column ( A verage distribution rathe number of years the	(b) Adjusted qualifying distributions  438,430 492,324 521,026 638,649 295,389  (d)	Net value of noncha	nstructions before  nstructions before  8,388,358 9,737,432 9,430,100 9,336,651 8,727,105	making any entries  (d) Distributio (col (b) divided	n ratio l by col (c))  0 052266 0 050560 0 055251 0 068402 0 033847  0 260326 0 05206  7,140,10
Base year (d	(a) e period years Calendar or tax year beginning in) 2008 2007 2006 2005 2004  Total of line 1, column ( A verage distribution rathe number of years the Enter the net value of n Multiply line 4 by line 3	(b) Adjusted qualifying distributions  438,430 492,324 521,026 638,649 295,389  (d)	Net value of noncha	9,430,100 9,336,651 8,727,105 ee 2 by 5, or by rs	making any entries  (d) Distributio (col (b) divided	n ratio 1 by col (c)) 0 052266 0 050560 0 055251 0 068402 0 033847 0 26032 0 05206 7,140,10
Base year (d	(a) e period years Calendar or tax year beginning in) 2008 2007 2006 2005 2004  Total of line 1, column ( A verage distribution rathe number of years the Enter the net value of n Multiply line 4 by line 3	(b) Adjusted qualifying distributions  438,430 492,324 521,026 638,649 295,389  (d)	Net value of noncha	9,430,100 9,336,651 8,727,105 ee 2 by 5, or by rs	making any entries  (d) Distributio (col (b) divided	n ratio I by col (c)) 0 052266 0 050560 0 055251 0 068402

	990-PF (2009)						age <b>4</b>
	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see	page	18 of	he inst	ructio	ns)	
1a	Exempt operating foundations described in section 4940(d)(2), check here T and enter "N/A" on line 1						
	Date of ruling or determination letter (attach copy of letter if necessary-see instructions)	Ų					
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check	[]	1				1,557
	here 🟲 🔽 and enter 1% of Part I, line 27b	.][					
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)	'					
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2				0
3	Add lines 1 and 2	. [	3				1,557
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				1,557
6	Credits/Payments						
а	2009 estimated tax payments and 2008 overpayment credited to 2009 <b>6a</b> 1	,200					
b	Exempt foreign organizations—tax withheld at source 6b						
c	Tax paid with application for extension of time to file (Form 8868) 6c	357					
d	Backup withholding erroneously withheld 6d						
7	Total credits and payments Add lines 6a through 6d		7				1,557
8	Enter any <b>penalty</b> 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	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid.</b>	▶ [	10				
11	Enter the amount of line 10 to be Credited to 2010 estimated tax Ref under	►	11				
Par	t VII-A Statements Regarding Activities						
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation	or di	d			Yes	No
	ıt participate or intervene in any political campaign?				1a		No
Ь	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (s						
	the instructions for definition)?				1b		No
	If the answer is "Yes" to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any mai	erials					
	published or distributed by the foundation in connection with the activities.						
С	Did the foundation file Form 1120-POL for this year?	•		•	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year						
	(1) On the foundation  \$\bigs\\$ 0 (2) On foundation managers  \$\bigs\\$						
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure ta	x imp	osed				
_	on foundation managers  \$\blue{\textbf{m}} \\$ 0				_		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?				2		No
_	If "Yes," attach a detailed description of the activities.						
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrum	•			,		No
45	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the cha				3		_
4a b	Did the foundation have unrelated business gross income of \$1,000 or more during the year?  If "Yes," has it filed a tax return on Form 990-T for this year?				4a 4b	-	No
Б 5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?				4D 5		No
,	If "Yes," attach the statement required by General Instruction T.						110
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either						
Ū	By language in the governing instrument, or						
	By state legislation that effectively amends the governing instrument so that no mandatory directions	ection	ıs				
	that conflict with the state law remain in the governing instrument?				6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and F				7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the						$\vdash$
	instructions) ►CT						
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorne	у					
	General (or designate) of each state as required by General Instruction G? If "No," attach explanati				8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4	942(	յ)(3)				
	or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for P	art X	IV on				
	page 27)? If "Yes," complete Part XIV				9	L_	No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and	addre.	sses		10		No

Form	990-PF (2009)		Р	age <b>5</b>
Pai	*t VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
	meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
	Website address ▶www amblertrust org			
14	The books are in care of ▶Thomas T Adams Telephone no ▶(203	761-	1150	
	Located at 1 44 Old Ridgefield Road 215 Wilton CT  ZIP+4 106897	,,,,,	1130	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here		!	-
	and enter the amount of tax-exempt interest received or accrued during the year			
Pai	t VII-B Statements Regarding Activities for Which Form 4720 May Be Required	ı	T.,	
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes V No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes V No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes \( \backslash \) Yes			
	(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)?			
	(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 V No			
Ь	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations			
	section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		No
	Organizations relying on a current notice regarding disaster assistance check here			
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts,			
	that were not corrected before the first day of the tax year beginning in 2009?	1c		No
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))			
а	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?			
	If "Yes," list the years 🕨 20, 20, 20			
Ь	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see page 20 of the instructions )	2b		
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
	▶ 20, 20, 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business			
	enterprise at any time during the year?			
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.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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?	4ь		No

	1 990-PF (2009)									Page <b>6</b>
Pa	rt VII-B Statements Reg				ich Form 4720	May Be Requ	ired (contir	nued)		
5a	During the year did the foundati							_		
	(1) Carry on propaganda, or oth						┌ Yes ┌	No		
	(2) Influence the outcome of an		·	•	• • • • • • • • • • • • • • • • • • • •	•		_		
	on, directly or indirectly, and									
	(3) Provide a grant to an individ						✓ Yes 「	No		
	(4) Provide a grant to an organi				· -		F., 5			
	in section 509(a)(1), (2), or					structions)	.   Yes	No		
	(5) Provide for any purpose other educational purposes, or for						□ v <sub>==</sub> □	- N-		
h	If any answer is "Yes" to 5a(1)-							INO		
	Regulations section 53 4945 or							ne \2	ь	No
	Organizations relying on a curre								<del>-</del>	110
_	If the answer is "Yes" to question						,			
·	tax because it maintained expe				•		. Г Yes Г	- No		
	If "Yes," attach the statement req						. ,,			
6a	Did the foundation, during the ye									
	premiums on a personal benefit						. Г Yes 🗸	- No		
ь	Did the foundation, during the ye								ь	No
	If "Yes" to 6b, file Form 8870.	, ,	,	•	., .				$\top$	
7a	At any time during the tax year,	was t	he foundation a part	y to a	a prohibited tax shel	ter transaction?	Γ Yes ▽	No		
ь	If yes, did the foundation receiv								ь	
	Information Abo								nplo	yees,
Pa	and Contractors		·		·					
_1_	List all officers, directors, truste		<del>-</del>	_	· · · · · · · · · · · · · · · · · · ·			ıs).		
	(a) Name and address	(b)	Title, and average hours per week		c) Compensation  If not paid, enter	(d) Contribu				account,
	(a) Name and address	de	evoted to position	``	-0-)	and deferred co	•	other	allowa	ances
Thom	nas T Adams	_	stee		36,000		0			0
	3ox 190	5 00	)							
	on, CT 06897									
	rend William L Sachs	Tru:	stee		36,000		0			0
	O Grove Avenue mond, VA 23226		,							
	avid F Clune	Trus	stee		36,000		0			0
PO E	3ox 277	5 00			55,555					_
Wilto	on,CT 06897									
2	Compensation of five highest-pa If none, enter "NONE."	id emp	oloyees (other than	t hose	e included on line 1–	-see page 23 of t	he instructio	ns).		
			(b) Title, and aver	age		1 ' '	ıbutıons to			
(a)	Name and address of each empl paid more than \$50,000	oyee	hours per week		(c) Compensation		e benefit			account, ances
	paid more than \$50,000		devoted to positi	on			d deferred nsation	other	allow	ances
NON	IE									
			1							
			1							
			1							
						1				
			1							
			†							
Tota	I number of other employees paid	over	<u> </u> \$50.000				. ▶			0
										0

Form 990-PF (2009)		Page <b>7</b>
Part VIII Information About Officers, Directors, To and Contractors (continued)	rustees, Foundation Managers, Highly	Paid Employees,
3 Five highest-paid independent contractors for professional serv	vices (see page 23 of the instructions). If none, e	nter "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 serv	ıces	0
Part IX-A Summary of Direct Charitable Activities		
·		
List the foundation's four largest direct charitable activities during the tax year. Incluorganizations and other beneficiaries served, conferences convened, research paper	ude relevant statistical information such as the number of rs produced, etc	Expenses
1		
2		
_		
3		
4		
•		
Part IX-B Summary of Program-Related Investme	<b>nts</b> (see page 23 of the instructions)	
Describe the two largest program-related investments made by the foundation of		A mount
1		
2		
-		
All other program-related investments See page 24 of the instru-	ctions	
3		
Total. Add lines 1 through 3		0
		Form <b>990-PF</b> (2009)

	. \/	
Part X	Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations,	
	see page 24 of the instructions.)	

	see page 24 of the instructions.)		<u>,                                      </u>
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc ,		
	purposes		
а	A verage monthly fair market value of securities	1a	4,779,794
b	A verage of monthly cash balances	1b	188,843
c	Fair market value of all other assets (see page 24 of the instructions)	<b>1</b> c	2,280,200
d	Total (add lines 1a, b, and c)	1d	7,248,837
e	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 2		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	7,248,837
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25		
	of the instructions)	4	108,733
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	7,140,104
6	Minimum investment return. Enter 5% of line 5	6	357,005
Par	Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(		
	foundations and certain foreign organizations check here 🕨 🚺 and do not complete t		
1	Minimum investment return from Part X, line 6	1	357,005
2a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009 (This does not include the tax from Part VI) 2b		
c	Add lines 2a and 2b	2c	1,557
3	Distributable amount before adjustments Subtract line 2c from line 1	3	355,448
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	355,448
6	Deduction from distributable amount (see page 25 of the instructions)	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII,		
	line 1	7	355,448
Par	t XII Qualifying Distributions (see page 25 of the instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
		4-	420.050
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	438,850
ь	Program-related investments—total from Part IX-B	1b	0
2	A mounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc ,	_	
_	purposes	2	
3	A mounts set aside for specific charitable projects that satisfy the		
а	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	438,850
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	1,557
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	437,293
	<b>Note:</b> The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating wheth the section 4940(e) reduction of tax in those years	ner the	toundation qualifies for

For	m 990-PF (2009)				Page <b>9</b>
P	art XIII Undistributed Income (see page	26 of the instruct	ions)		-
		(a) Corpus	(b) Years prior to 2008	(c) 2008	( <b>d)</b> 2009
1	Distributable amount for 2009 from Part XI, line 7				355,448
2	Undistributed income, if any, as of the end of 2008				
а	Enter amount for 2008 only			30,281	
b	Total for prior years 20, 20, 20		0		
3	Excess distributions carryover, if any, to 2009				
а	From 2004				
b	From 2005				
c	From 2006				
d	From 2007				
	From 2008				
	Total of lines 3 a through e	0			
4	Qualifying distributions for 2009 from Part				
	XII, line 4 🕨 \$				
	Applied to 2008, but not more than line 2a			30,281	
b	Applied to undistributed income of prior years		0		
	(Election required—see page 26 of the instructions)		Ŭ		
С	Treated as distributions out of corpus (Election required—see page 26 of the instructions)	0			
А	Applied to 2009 distributable amount				355,448
	Remaining amount distributed out of corpus	53,121			
	Excess distributions carryover applied to 2009	, ,			0
•	(If an amount appears in column (d), the	<u> </u>			
	same amount must be shown in column (a).)				
6	Enter the net total of each column as indicated below:				
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	53,121			
	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)		0		
_1	tax has been previously assessed				
a	Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions		0		
e	Undistributed income for 2008 Subtract line				
_	4a from line 2a Taxable amount—see page 27				
	of the instructions			0	
f	Undistributed income for 2009 Subtract				
	lines 4d and 5 from line 1 This amount must				0
_	be distributed in 2010				
,	corpus to satisfy requirements imposed by				
	section 170(b)(1)(F) or 4942(g)(3) (see page 27				
	of the instructions)	0			
8	Excess distributions carryover from 2004 not				
	applied on line 5 or line 7 (see page 27 of the	0			
0	Instructions)				
9	Subtract lines 7 and 8 from line 6a	53,121			
10	Analysis of line 9				
	Excess from 2005				
	Excess from 2006				
c	Excess from 2007				
d	Excess from 2008				
_e	Excess from 2009 53,121				

If the foundation has received a ruling or o				rt vii-A, question	19)
foundation, and the ruling is effective for 2	009, enter the dat	e of the ruling	▶∟		
Check box to indicate whether the organiz Enter the lesser of the adjusted net		perating foundation		on 4942(j)(3) o	or <b>I</b> 4942(j)(.
income from Part I or the minimum	Tax year	(h) 2000	Prior 3 years	(4) 2006	(e) Total
investment return from Part X for each	(a) 2009	<b>(b)</b> 2008	(c) 2007	(d) 2006	
year listed					
Qualifying distributions from Part XII,					
line 4 for each year listed					
Amounts included in line 2c not used directly for active conduct of exempt activities					
Q ualifying distributions made directly					
for active conduct of exempt activities Subtract line 2d from line 2c					
Complete 3a, b, or c for the					
alternative test relied upon					
"Assets" alternative test—enter					
<ul><li>(1) Value of all assets</li><li>(2) Value of assets qualifying</li></ul>					
under section 4942(j)(3)(B)(i)					
"Endowment" alternative test— enter 2/3					
of minimum investment return shown in Part X, line 6 for each year listed.					
`Support" alternative test—enter					
<ol> <li>Total support other than gross investment income (interest,</li> </ol>					
dividends, rents, payments					
on securities loans (section					
512(a)(5)), or royalties) (2) Support from general public					
and 5 or more exempt					
organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support					
from an exempt organization					
(4) Gross investment income  t XV Supplementary Information	(Camariata t		 	b - d &F 000	
assets at any time during				on nau \$5,000	or more m
Information Regarding Foundation Manag					
List any managers of the foundation who h before the close of any tax year (but only				•	dation
	·	·	, , ,		
Lich and manager of the foundation who	100/	: hb h l		II Iauaa maukian a <b>s</b> k	h -
List any managers of the foundation who o ownership of a partnership or other entity)		•	·	ily large portion of t	ne
Information Regarding Contribution, Gran	h Cift Laan Sabal	arabin ata Drawe			
Check here					
unsolicited requests for funds. If the found	kes contributions t lation makes gifts,	o preseiected chai grants, etc (see p	ritable organization: age 28 of the instru	s and does not acce ictions) to individual	pt Is or organizati:
under other conditions, complete items 2a			-	•	-
The name, address, and telephone numbe	r of the person to w	whom applications s	should be addresse	d	
See Additional Data Table					
			-   -     -   -   -   -   -   -   -   -		
The form in which applications should be	submitted and infor	mation and materi	als they should incl	ude	
See Additional Data Table					
Any submission deadlines					
,					
See Additional Data Table					
Any restrictions or limitations on awards,	such as by geogra	phical areas, chari	table fields, kinds o	f institutions, or oth	er
factors					
See Additional Data Table					

Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	A mount
	or substantial contributor	recipient		
a Paid during the year See Additional Data Table	or substantial contributor	recipient		
Total				311,51
<b>b</b> Approved for future payment				
See Additional Data Table				
Total			h 2h	55.66

Form 990-	•	ing Astivitis	<u> </u>			Page <b>12</b>
	I-A Analysis of Income-Products amounts unless otherwise indicated		susiness income	Excluded by section	n 512, 513, or 514	(e) Related or exempt
<b>1</b> Progran	n service revenue	(a) Business code	<b>(b)</b> A mount	(c) Exclusion code	(d) A mount	function income (See page 28 of the instructions )
a						
ь						
	and contracts from government agencies					
_	ership dues and assessments					
	on savings and temporary cash investments			14	100	
	nds and interest from securities			14	152,576	
<b>5</b> Netrer	ntal income or (loss) from real estate					
<b>a</b> Debt-	financed property					
	ebt-financed property			16	114,010	
	al income or (loss) from personal property			14	15,427	
	nvestment income			18	-422,680	
	(loss) from sales of assets other than inventory ome or (loss) from special events			10	122,000	
	profit or (loss) from sales of inventory					
-	revenue <b>a</b> _					
d						
e						
	al Add columns (b), (d), and (e).		0		-140,567	
	Add line 12, columns (b), (d), and (e).			1	L3	-140,567
	vorksheet in line 13 instructions on page 2 I-B Relationship of Activities to			vemnt Burnes	A.S.	
Line No.	Explain below how each activity for whithe accomplishment of the organization page 28 of the instructions )					
	1					
	1					

Form 99	0-PF (2										Рa	ge <b>13</b>
Part	XVII	Information Re Noncharitable			nsfers To and Tr Inizations	ansac	tions and	l Relat	ionships With			
1 Did th	he organiz	ation directly or indirectly				er organız	ation described	ın section	l		Yes	No
501(	c) of the (	Code (other than section 5	501(c)(3)	organızatı	ons) or in section 527, rel	ating to p	olitical organiz	ations?				
<b>a</b> Tran	nsfers fr	om the reporting foun	dation to	o a nonc	harıtable exempt org	anızatıo	n of					
(1)	Cash.									. 1a(1)		No
(2)	Othera	ssets								1a(2)		No
<b>b</b> Othe	er trans	actions										
(1)	Sales o	fassets to a nonchar	itable e	xempt o	rganızatıon					. 1b(1)		No
(2)	Purcha	ses of assets from a r	nonchari	itable ex	empt organization.					1b(2)		No
(3)	Rental	of facilities, equipmer	nt, or oth	ner asse	ts					. 1b(3)		No
(4)	Reımbu	rsement arrangement	ts							. 1b(4)		No
(5)	Loans o	or loan guarantees.								. 1b(5)		No
<b>(6)</b> I	Performa	ance of services or m	embersl	hıp or fuı	ndraising solicitation	s				. 1b(6)		No
<b>c</b> Shar	rıng of fa	icilities, equipment, n	naılıng lı	ısts, oth	er assets, or paıd em	ployees				. 1c		No
of th	ne goods	r to any of the above , other assets, or ser action or sharing arra	vices gi ingemen	ven by t it, show	he reporting foundati in column <b>(d)</b> the val	on Ifth ue ofth	ie foundatioi	n receive	d less than fair ma	arket value		
(a) Line	No	(b) Amount involved	(c) Nam	e of nonch	narıtable exempt organıza	tion	(d) Descripti	on of trans	fers, transactions, and	sharing arra	ingemer	nts
-												
-												
						_						
desc	cribed in 'es," cor	ation directly or indir section 501(c) of th nplete the following s (a) Name of organization	e Code ( chedule	(other th		)) or ın s	section 527	_			<sub>es</sub> F	<b>-</b> No
	the be based	penalties of perjury, is st of my knowledge a on all information of v ****	nd beliet	f, it is tri	ue, correct, and comp		_	f prepare	=			
	Sig	nature of officer or tr	ustee				Date		Title			
Sign Here	il er's nly	Preparer's Natha Signature	PΑ		Date 2010	-09-23	Check if self- employed ▶	Preparer' identifyin number (s Signature 30 of the i	g see on pa	-		
	Paid Preparer's Use Only	Firm's name (or you if self-employed),	rs	Capos	sela Cohen LLC				EIN ►			
	_	address, and ZIP co	ode .	368 C	enter Street				Phone 75 (202)	254 700		
				Southr	ort, CT 06890				Phone no (203)	254-/00	U	
I		l .		South	3,1,5, 00030				1			

**Software ID:** 09000028

Software Version: 2009.04020

**EIN:** 06-6473263

Name: Elizabeth Raymond Ambler Trust

# Form 990PF Part XV Line 2a - 2d - Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

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

Elizabeth Raymond Ambler Trust 44 Old Ridgefield Road Suite 215 Wilton, CT 06897 (203) 761-1150

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

Must submit scholarship application form with required attachments including the Free Application for Federal Student Aid(FAFSA) and a copy of parent/guardian Federal Income tax return. For scholarship renewals must submit a letter requesting continuation of scholarship, a copy of final grades, FAFSA, tax returns and any information on additional scholarships or awards.

c Any submission deadlines

April 30 for new scholarship applications and May 31 for renewal applications

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

Individual scholarships range from \$1,000 to \$6,000 Preferences are to be afforded to students resident in the Town of Wilton first and surrounding towns second

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

Elizabeth Raymond Ambler Trust 44 Old Ridgefield Road Suite 215 Wilton, CT 06897 (203) 761-1150

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

Must submit non-scholarship grant application with specific project information, organizational information, financial statements and proof of tax exempt status

c Any submission deadlines

March 1

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

Municipal, religious, charitable, benevolent or educational organizatios or corporations as determined by the thrustees

Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
<b>a</b> Paid during the year				
Woodcock Nature Center55 Deer Run Road Wilton, CT 06897			Charitable Organization	5,000
Nursing & Home Care IncPO Box 489 Wilton,CT 06897	None	Non-profit	Charitable Organization	5,000
Neil Brodsky62 Cobbs Mill Road Wilton,CT 06897	None	N/A	Scholarship - Fairfield University	1,600
Cathy Dınas28 Quaker Road Norwalk, CT 06851	None	N/A	Scholarship - University of Connecticut	2,000
Alison Harford30 Ricky Lane Norwalk, CT 06854	None	N/A	Scholarship - Illinois Wesleyan University	3,000
Jessy Cuevas49 Meadow Street Norwalk, CT 06854	None	N/A	Scholarship - Long Island University	7,500
Anna Lupinska43 Summitt Ave Norwalk, CT 06854	None	N/A	Scholarship - University of Connecticut	2,000
Santino DiCamillo2 Ambler Drive Norwalk, CT 06851	None	N/A	Scholarship - University of Connecticut	500
Vıncent Benıcaso15 Barnum Ave Norwalk, CT 06851	None	N/A	Scholarship - Endicott College	3,000
Celeste Taylor3 Scott Street Norwalk, CT 06851	None	N/A	Scholarship - Virginia State University	2,000
Sujata Hingoranı14 1/2 Harriet Street Norwalk, CT 06851	None	N/A	Scholarship - University of Connecticut	2,000
Kaitlin Fry 2 Clearview Avenue Norwalk, CT 06851	None	N/A	Scholarship - University of Massachusetts	2,500
Marsha Smith4B Meredith Court Norwalk,CT 06854	None	N/A	Scholarship - Tulane University	6,000
Sarah Krouse10 Woodchuck Court Norwalk, CT 06854	None	N/A	Scholarship - George Washington University	1,000
Michael Zaremski20 Fairview Avenue - Unit 3 Norwalk, CT 06850	None	N/A	Scholarship - Indiana University	2,000
Total				311,517

Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
<b>a</b> Paid during the year				
Molly Fonseca94 Valeview Road Wilton, CT 06897	None	N/A	Scholarship - Wake Forest University	5,000
Hervens Jeannis 32 Triangle Street Norwalk, CT 06855	None	N/A	Scholarship - Syracuse University	2,500
Vırgınıa Glass16 Turner Lane Wilton,CT 06897	None	N/A	Scholarship - Purdue University	2,000
Krystın Saglımbene68 Old Mıll Road Wilton, CT 06897	None	N/A	Scholarship - University of Connecticut	2,500
Jashayla Haygood15 Claremore Dr Norwalk, CT 06850	None	N/A	Scholarship - Morgan State University	1,500
Joseph DıCamıllo2 Ambler Drıve Norwalk, CT 06851	None	N/A	Scholarship - Porter & Chester Institute	1,500
Andrea Tyler15 Old Field Place Norwalk, CT 06853	None	N/A	Scholarship - Bryant College	2,000
Stephanie Senecharles 133 Partrick Avenue Norwalk, CT 06851	None	N/A	Scholarship - Quinnipiac University	2,500
Russell Torris7 Chipmunk Lane Wilton,CT 06897	None	N/A	Scholarship - Dickinson College	2,000
Brian Froehlich46 Pimpewaug Road Wilton, CT 06897	None	N/A	Scholarship - University of Hartford	2,500
Heeren Makanjı45 Karen Drıve Norwalk, CT 06851	None	N/A	Scholarship - University of Connecticut	3,000
Kettı Muschler17 Bayberry Lane Wilton, CT 06897	None	N/A	Scholarship - Rider University	2,000
A manda Pınto12 Cobbs Mıll Road Wılton, CT 06897	None	N/A	Scholarship - Cornell University	3,000
Ashley Metellus9 Cottage Street Norwalk, CT 06855	None	N/A	Scholarship - Mount Holyoke College	2,500
Elie Sanon48 North Bishop Ave Bridgeport, CT 06610	None	N/A	Scholarship - Rhode Island School of Design	2,500
Total				311,517

Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
a Paid during the year				
Javier Ceja17D Merritt Place Norwalk, CT 06854	None	N/A	Scholarship - Pace University	6,000
Shaquaisha Andrews146 1/2 South Main Street Norwalk, CT 06854	None	N/A Scholarship - Southern Connecticut		2,500
Nadege Francois180 Suncrest Road Norwalk, CT 06854	None	N/A	Scholarship - Central Connecticut	7,500
Cara Corcoran5 Blackberry Lane Norwalk, CT 06854	None	N/A	Scholarship - Southern Vermont College	2,500
Chaz Burden101 Kathryn Drıve Brıdgeport, CT 06610	None	N/A	Scholarship - Southern Connecticut	1,250
Nicole Saglimbeme68 Old Mill Road Wilton,CT 06897	None	N/A	Scholarship - Southern New Hampshire University	2,500
Alexander Thomas 4 VanZant Street Norwalk, CT 06855	None	N/A	Scholarship - Southern Connecticut	1,000
Caroline Rende115 North Seir Hill Road Norwalk, CT 06850	None	N/A	Scholarship - Providence College	3,000
Marie Clervil105B Washington Village Norwalk, CT 06854	None	N/A	Scholarship - Western Connecticut State	1,500
Jenane Clervil19 Lowe Street Norwalk, CT 06854	None	N/A	Scholarship - Quinnipiac University	4,000
Star Jackson12 Suncrest Road Norwalk, CT 06854	None	N/A	Scholarship - University of Connecticut	1,000
Brian Allen30 Amos White Road Southbury, CT 06488	None	N/A	Scholarship - University of Connecticut	5,000
Jeffery Sierra261 Ely Ave Bldg 21 Apt 3A Norwalk,CT 06854	None	N/A	Scholarship - Philadelphia University	6,000
Cındy Artega49 Sılvermine Ave Norwalk, CT 06850	None	N/A	Scholarship - Boston College	9,000
Suria Ceja17D Merritt Place Norwalk, CT 06854	None	N/A	Scholarship - University of Connecticut	5,000
Total				311,517

Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount	
Name and address (home or business)	any foundation manager or substantial contributor	recipient			
a Paid during the year					
Dan Zapata49 Meadow Street Norwalk, CT 06854	None	N/A	Scholarship - Central Connecticut	2,500	
Sophia Lubin85 Lexington Ave Norwalk, CT 06854	None	N/A	Scholarship - Savannah College Art & Design	6,667	
Brooke Widman63 Truman Street Norwalk, CT 06850	None	N/A	Scholarship - Vassar College	6,000	
Christine Lawrence5 Barjune Road Norwalk, CT 06851	None	N/A	Scholarship - Providence College	7,000	
Megan Smith4B Meredith Court Norwalk, CT 06854	None	N/A	Scholarship - University of Connecticut	4,500	
Marcus Cave541 Rosedale Ave Apt 6A New York, NY 10003	None N/A Scholarship - Howard University		5,000		
Jennıfer Velez69 Truman Street Norwalk, CT 06850	None	N/A	Scholarship - Quinnipiac University	2,500	
Bın Ye36 Allen Drıve Uncasville,CT 06382	None	N/A	Scholarship - Three Rivers Community College	2,500	
Weir Farm Art Center735 Nod Hill Road Wilton, CT 06897	N/A	Non-profit	Charitable Organization	20,000	
St Stephen's Episcopal Church6000 Grove Avenue Richmond, VA 23226	N/A	Church	Charitable Organization	5,000	
Lockwood-Mathews Mansion Museum of Norwalk Inc295 West Avenue Norwalk, CT 06850	N/A	Non-profit	Charitable Organization	50,000	
The Wilton Candlelight Concerts70 Ridgefield Road Wilton, CT 06897	N/A	Non-profit	Charitable Organization	10,000	
Ambler Farm257 Hurlbutt Street Wilton, CT 06897	N/A	Non-profit	Charitable Organization	5,000	
Wilton Youth CouncilPO Box 172 Wilton,CT 06897	N/A	Church	Charitable Organization	5,000	
Wilton Library Association137 Old Ridgefield Road Wilton, CT 06897	N/A	Non-profit	Charitable Organization	20,000	
Total				311,517	

profit Charitable Organization 5,00
nrofit Charitable Organization F.00
profit Charitable Organization 5,00
profit Charitable Organization 5,00
profit Charitable Organization 5,00
•

#### Form 990PF Part XV Line 3b - Grants and Contributions Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount	
Name and address (home or business)	any foundation manager or substantial contributor	recipient			
<b>b</b> Approved for future payment					
Vırgınıa Glass16 Turner Lane Wılton,CT 06897	None	N/A	Scholarship - Purdue University	1,000	
Celeste Taylor3 Scott Street Norwalk, CT 06851	None	N/A	Scholarship - Virginia State University	2,000	
Cındy Artega49 Sılvermıne Ave Norwalk, CT 06850	None	N/A	Scholarship - Boston College	4,500	
Marsha Smith16 Seir Hill Road Wilton,CT 06897	None	N/A	Scholarship - Tulane University	3,000	
Andrea Tyler15 Old Field Place Norwalk, CT 06853	eld Place None N/A Scholarship - Bryant College		1,000		
Anna Lupinska43 Summitt Ave Norwalk, CT 06854	None	N/A	Scholarship - University of Connecticut	1,000	
Brian Allen30 Amos White Road Southbury,CT 06488	None	N/A	Scholarship - University of Connecticut	2,500	
Joseph DıCamıllo2 Ambler Drıve Norwalk, CT 06851	None	N/A	Scholarship - University of Connecticut	500	
A manda Pınto12 Cobbs Mıll Road Wılton,CT 06897	None	N/A	Scholarship - Cornell University	1,000	
Russell Torris7 Chipmunk Lane Wilton,CT 06897	None	N/A	Scholarship - Dickinson College	1,000	
Christine Lawrence5 Barjune Road Norwalk, CT 06851	None	N/A	Scholarship - Arcadia University	3,500	
Kettı Muschler17 Bayberry Lane Wılton,CT 06897	None	N/A	Scholarship - Rider University	1,000	
Shaquaisha Andrews146 1/2 South Main Street Norwalk, CT 06854		N/A	Scholarship - Southern Connecticut	2,500	
Vıncent Benıcaso15 Barnum Ave Norwalk, CT 06851	None	N/A	Scholarship - Endicott College	1,500	
Marcus Cave541 Rosedale Ave Apt 6A Bronx,NY 10473	None	N/A	Scholarship - Howard University	2,500	
Total				55,667	

## Form 990PF Part XV Line 3b - Grants and Contributions Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount	
Name and address (home or business)	any foundation manager or substantial contributor	recipient			
Approved for future payment					
Surıa Ceja17D Merritt Place Norwalk, CT 06854	None	N/A	Scholarship - Univ of Connecticut	2,500	
Javier Ceja17d Merritt Place Norwalk, CT 06854	None	N/A	Scholarship - Pace University	3,000	
Jenane Clervil19 Lowe Street Norwalk, CT 06854	None	N/A	Scholarship - Quinnipiac University	1,000	
Jessy Cuevas49 Meadow Street Norwalk, CT 06854	None	N/A	Scholarship - Long Island University	2,500	
Molly Fonseca94 Valeview Road Wilton, CT 06897	None	N/A	Scholarship - Wake Forest University	2,500	
Nadege Francois180 Suncrest Road Norwalk, CT 06854	None	N/A	Scholarship - Central Connecticut	2,500	
Sophia Lubin85 Lexington Ave Norwalk, CT 06854	None	N/A	Scholarship - Savannah College Art & Design	1,667	
Caroline Rende115 North Seir Hill Road Norwalk, CT 06850	None	N/A	Scholarship - Providence College	1,500	
Nicole Saglimbene68 Old Mill Road Wilton, CT 06897	None	N/A	Scholarship - Southern New Hampshire University	2,500	
leffery Sierra261 Ely Ave Apt 3A Bldg 71 Norwalk, CT 06854	None	N/A	Scholarship - Philadelphia University	3,000	
Megan Smith4b Meredith Court Norwalk, CT 06854	None	N/A	Scholarship - Univ of Connecticut	2,500	
Brooke Widman63 Truman Street Norwalk, CT 06850	None	N/A	Scholarship - Vassar College	2,000	
Total			▶ 3b	55,667	

# **TY 2009 Accounting Fees Schedule**

Name: Elizabeth Raymond Ambler Trust

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	24,770	12,385		12,385

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

# **TY 2009 Depreciation Schedule**

Name: Elizabeth Raymond Ambler Trust

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Land - 333 Hurlbutt Road Wilton, CT	1998-06-18	1,720,000		L		0	0		
Land - 6 Acres	1998-06-18	50,000		L		0	0		
Computer	2002-04-23	1,484	1,484	200DB	5 000000000000	0	0		
Computer	2005-02-01	1,295	1,071	200DB	5 000000000000	149	0		
Office Furniture	2005-02-11	2,175	1,496	200DB	7 00000000000	194	0		
Office Furniture	2005-02-12	2,390	1,643	200DB	7 000000000000	213	0		

# **TY 2009 Investments Corporate Stock Schedule**

Name: Elizabeth Raymond Ambler Trust

Name of Stock	End of Year Book Value	End of Year Fair Market Value
700sh Goldman Sachs Group Inc	89,179	118,188
1500sh General Electric	23,978	22,695
425sh Microsoft Corp	11,998	12,958
1525sh Bank of Amer	24,292	22,967
1100sh Conocophillips	71,270	56,177
950sh Hewlett Packard Co	41,689	48,935
175sh Metlife Inc	4,823	6,186
116623sh Bernstein Intermediate	1,524,104	1,544,090
6419sh Bernstein Emerging Markets	188,034	186,606
62312.975sh Bernstein International	1,096,422	942,795
650sh Altrıa Group	10,780	12,760
125sh Chevron Corp	8,543	9,624
343sh Pepsico Inc	17,587	20,854
8100sh Sprint Nextel	39,062	29,646
750sh JP Morgan Chase	27,792	31,253
250sh Travelers Cos	12,986	12,465
1125sh Time Warner	28,208	32,783
550sh Teva Pharmaceutical	25,682	30,899
375sh Alcon Inc	48,031	61,631
440sh Apple Computer	45,489	92,778
200sh Franklın Resources	22,795	21,070
1000sh Gilead Sciences Inc	33,707	43,280
800sh XL Capital LTD	15,077	14,664
1150sh Cisco Systems	33,121	27,531
550sh Kohls	23,007	29,662
850sh Schlumberger Ltd	58,815	55,327
2200sh AT&T	78,993	61,666
1100sh CBS Corp	11,233	15,455
1300sh Merck & Co	39,745	47,502
1450sh Nokia	17,177	18,633

Name of Stock	End of Year Book Value	End of Year Fair Market Value
3300sh Pfizer Inc	80,791	60,027
0sh Allstate Corp	0	0
375sh Deutsche Bank	22,432	26,591
1000sh Macys Inc	33,421	16,760
600sh Morgan Stanley	21,752	17,760
850sh Supervalu Inc	13,891	10,804
27082sh AllianceBernstein Global Real Estate Invt	393,559	213,946
225sh Air Products	20,070	18,239
475sh Cameron International	15,977	19,855
300sh Celegene Corp	17,123	16,704
70sh CME Group	25,457	23,517
2500sh Intel Corp	43,734	51,000
1000sh Qualcomm	42,501	46,260
150sh Wal-Mart Stores	8,122	8,018
125sh Medco Health Solutions	5,438	7,989
475sh Costco	26,234	28,106
150sh Baxter International	8,478	8,802
275sh The Walt Disney Co	4,989	8,869
550sh Devon Energy Corporation	35,779	40,425
450sh JC Penney Co	10,221	11,975
300sh Bunge LTD	14,471	19,149
700sh Corning Inc	9,295	13,517
325sh Western Digital Corp	9,130	14,349
3000sh News Corp	23,159	41,070
780sh Lowes Cos Inc	14,429	18,244
425sh Home Depot Inc	9,058	12,295
75sh General Mills Inc	4,918	5,311
1800sh Motorola Inc	12,012	13,968
1300sh Tyco Electronics	23,918	31,915
925sh Du Pont De Nemours	24,511	31,145

Name of Stock	End of Year Book Value	End of Year Fair Market Value
750sh Time Warner Cable	26,604	31,043
1900sh Dell Inc	25,679	27,284
1000sh Wells Fargo & Co	22,900	26,990
950sh Ingersoll-Rand	24,167	33,953
1300sh Valero Energy	23,479	21,775
375sh Northrop Grumman Corp	17,204	20,944
600sh Aetna	17,335	19,020
1000sh Symantec Corp	13,781	17,890
550sh Archer Daniels Midland	14,319	17,221
750sh US Bancorp	14,372	16,883
1500sh Ford Motor	12,136	15,000
600sh Nexen	14,125	14,358
350sh Ameriprise Financial	12,129	13,587
250sh Cimares Energy Co	8,191	13,243
550sh Vodafone Group	10,302	12,700
17sh NVR Inc	8,460	12,082
750sh Constellation	11,391	11,948
450sh BB&T Corp	12,085	11,417
200sh SPX Corp	10,165	10,940
1600sh Office Depot Inc	11,196	10,320
450sh AK Steel Holding Corp	9,212	9,608
550sh Masco Corp	5,415	7,596
425sh Steel Dynamics	6,745	7,531
350sh Textron	3,764	6,584
600sh D R Horton Inc	5,725	6,522
325sh Unum Group	4,727	6,344
125sh ACE Ltd	5,424	6,300
1100sh RRI Energy Inc	5,117	6,292
200sh Garmın Ltd	5,952	6,140
400sh Smithfield Foods	5,558	6,076

Name of Stock	End of Year Book Value	End of Year Fair Market Value
150sh Ensco International	4,979	5,991
325sh Dean Foods Co	6,115	5,863
500sh Pulte Homes Inc	5,873	5,000
200sh Limited Brands	1,746	3,848
118sh AOL Inc	2,531	2,747
145sh Google Inc Class A	60,791	89,897
1734sh JP Morgan Chase & Co	62,308	72,256
700sh Illinois Tool Works	28,636	33,593
381sh Occidental Petroleum Corp	25,500	30,994
375sh Danaher Corp	23,075	28,200
550sh Target Corp	25,450	26,604
300sh Freeport McMoran Copper	17,298	24,087
1200sh EMC Corp	20,012	20,964
375sh Credit Suisse Group	16,975	18,435
300sh Arcelormittal NY	11,341	13,725
300sh Cooper Industries	12,026	12,792
475sh Quanta Services Inc	10,071	9,899
350sh Johnson Controls Inc	8,919	9,534
250sh KLA Tencor Corporation	8,664	9,040
100sh FedEx Corp	7,085	8,345
150sh Covidien PLC	7,124	7,184
150sh National Oil Well	5,338	6,614
75sh VISA Inc	5,018	6,560
225sh Vale SA-SP	6,647	6,532
125sh Anheuser-Bush	6,338	6,504
150sh Vertex Pharmaceuticals Inc	5,844	6,428
375sh Comcast Corp	6,460	6,323
200sh Broadcom Corp	5,697	6,290
175sh Suncor Energy	6,518	6,179
100sh United Parcel Service	5,899	5,737

Name of Stock	End of Year Book Value	End of Year Fair Market Value
175sh Bank of NY Mello	5,235	4,895
150sh Principal Financial Group	4,415	3,606
25sh Amazon.com Inc	1,902	3,363

efile GRAPHIC print - DO NOT PROCESS As Filed Data - DLN: 93491280006010

## **TY 2009 Investments - Land Schedule**

Name: Elizabeth Raymond Ambler Trust

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Land - 333 Hurlbutt Road Wilton, CT	1,720,000	0	1,720,000	0
Land - 6 Acres	50,000	0	50,000	0

# TY 2009 Land, Etc. Schedule

Name: Elizabeth Raymond Ambler Trust

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Computer	1,484	1,484		0
Computer	1,295	1,220	75	0
Office Furniture	2,175	1,690	485	0
Office Furniture	2,390	1,856	534	0

# **TY 2009 Legal Fees Schedule**

Name: Elizabeth Raymond Ambler Trust

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal Fees	39,020	39,020		0

# **TY 2009 Other Expenses Schedule**

Name: Elizabeth Raymond Ambler Trust

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Miscellaneous expenses	6,239	3,119		3,120
Telephone	1,269	635		634
Probate court fees	1,265	633		632

efile GRAPHIC print - DO NOT PROCESS As Filed Data - DLN: 93491280006010

#### **TY 2009 Other Income Schedule**

Name: Elizabeth Raymond Ambler Trust

	Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
I	Other income	15,427	15,427	15,427

#### **TY 2009 Other Professional Fees Schedule**

Name: Elizabeth Raymond Ambler Trust

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Outside Services	21,500	5,375		16,125
Investment Advisory Fees	27,399	27,399		0
Consulting - computer & website	5,000	0		5,000

#### **TY 2009 Reduction Explanation Statement**

Name: Elizabeth Raymond Ambler Trust

**EIN:** 06-6473263

**Explanation:** The foundation owns a lot that is landlocked and generates no

income or cash flow. The lot was valued at \$50,000 when it was gifted to the trust through the Estate of Elizabeth Raymond

Ambler. The trustees are in the process of trying to secure access

to the lot in order to convert it to an income producing asset.

#### **TY 2009 Taxes Schedule**

Name: Elizabeth Raymond Ambler Trust

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Real Estate Taxes	3,781	3,781		0
Foreign Taxes	4,253	4,253		0