



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



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

OMB No. 1545-0052

**2009**

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

For calendar year **2009**, or tax year beginning , **2009**, and ending , **20**

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return  
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>UD CARSON FAM CHARITABLE TRUST</b>		A Employer identification number <b>13-6957038</b>
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions)
	<b>BANK OF AMERICA N.A. PO BOX 1802</b>		( ) -
	City or town, state, and ZIP code <b>PROVIDENCE, RI 02901-1802</b>		C If exemption application is pending, check here <input type="checkbox"/> D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 1,425,354</b>		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	6,500,000.			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B.				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	170,792.	170,792.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	6,607,916.			
	b Gross sales price for all assets on line 6a <b>14,842,438.</b>				
	7 Capital gain net income (from Part IV, line 2)		6,607,916.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	4,295.	14,769.		STMT 1
	12 Total. Add lines 1 through 11	13,283,003.	6,793,477.		
	13 Compensation of officers, directors, trustees, etc.	36,000.	21,600.		14,400.
	14 Other employee salaries and wages	96,764.			96,764.
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) STMT 2	2,598.	26,124.		2,598.
	24 Total operating and administrative expenses. Add lines 13 through 23	135,362.	47,724.		113,762.
	25 Contributions, gifts, grants paid	27,988,435.			27,988,435.
	26 Total expenses and disbursements. Add lines 24 and 25	28,123,797.	47,724.		28,102,197.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-14,840,794.			
	b Net investment income (if negative, enter -0-)		6,745,753.		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash - non-interest-bearing . . . . .	NONE	NONE	
	2	Savings and temporary cash investments . . . . .	13,190,664.	151,141.	15,114.
	3	Accounts receivable ▶ Less. allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less. allowance for doubtful accounts ▶			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ * Less. allowance for doubtful accounts ▶	NONE	* NONE	NONE
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10 a	Investments - U.S. and state government obligations (attach schedule) .	NONE	NONE	NONE
	b	Investments - corporate stock (attach schedule) . . . . .	NONE	544,138.	548,938.
	c	Investments - corporate bonds (attach schedule) . . . . .	NONE	NONE	NONE
	11	Investments - land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶	NONE	NONE	
	12	Investments - mortgage loans . . . . .	NONE	NONE	
	13	Investments - other (attach schedule) . . . . . STMT 3	1,618,882.	928,205.	574,200.
	14	Land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶ STMT 4)	2,567,289.	287,102.	287,102.	
16	<b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I) . . . . .	17,376,835.	1,910,586.	1,425,354.	
Liabilities	17	Accounts payable and accrued expenses . . . . .			
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons .			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ▶ )			
23	<b>Total liabilities</b> (add lines 17 through 22) . . . . .				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted . . . . .			
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>				
	27	Capital stock, trust principal, or current funds . . . . .	14,809,546.	1,623,484.	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .			
	29	Retained earnings, accumulated income, endowment, or other funds . .	2,567,289.	287,102.	STMT 5
30	<b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	17,376,835.	1,910,586.		
31	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	17,376,835.	1,910,586.		

## Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) . . . . .	1	17,376,835.
2	Enter amount from Part I, line 27a . . . . .	2	-14,840,794.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 6 . . . . .	3	16,589.
4	Add lines 1, 2, and 3 . . . . .	4	2,552,630.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 7 . . . . .	5	642,044.
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	1,910,586.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)			(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a SEE PART IV DETAIL</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
<b>a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69</b>					
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
<b>a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>2 Capital gain net income or (net capital loss) . . . . .</b> { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			<b>2</b>	<b>6,607,916.</b>	
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):</b> If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8. . . . .			<b>3</b>		

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? . . . . ☐ Yes ☒ No  
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.**1 Enter the appropriate amount in each column for each year; see page 18 of the instructions before making any entries.**

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	32,179,483.	24,181,808.	1.33073106031
2007	102,625.	37,217,355.	0.00275745012
2006	26,986,739.	53,863,890.	0.50101726778
2005	26,330,102.	35,439,370.	0.74296190931
2004	23,514,924.	28,043,130.	0.83852708310
<b>2 Total of line 1, column (d) . . . . .</b>			<b>2 3.41599477062</b>
<b>3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . . . .</b>			<b>3 0.68319895412</b>
<b>4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 . . . . .</b>			<b>4 13,940,578.</b>
<b>5 Multiply line 4 by line 3 . . . . .</b>			<b>5 9,524,188.</b>
<b>6 Enter 1% of net investment income (1% of Part I, line 27b) . . . . .</b>			<b>6 67,458.</b>
<b>7 Add lines 5 and 6 . . . . .</b>			<b>7 9,591,646.</b>
<b>8 Enter qualifying distributions from Part XII, line 4 . . . . .</b> If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.			<b>8 28,102,197.</b>

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the instructions)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. . . . .		1	67,458.
b Date of ruling or determination letter _____ (attach copy of ruling letter if necessary - see instructions)			
c Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b. . . . .			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) . . . . .		2	
3 Add lines 1 and 2 . . . . .		3	67,458.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) . . . . .		4	NONE
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- . . . . .		5	67,458.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009 . . . . .	6a 198,612.		
b Exempt foreign organizations-tax withheld at source . . . . .	6b NONE		
c Tax paid with application for extension of time to file (Form 8868) . . . . .	6c NONE		
d Backup withholding erroneously withheld . . . . .	6d		
7 Total credits and payments. Add lines 6a through 6d . . . . .		7	198,612.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached . . . . .		8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . . . .		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . . .		10	131,154.
11 Enter the amount of line 10 to be Credited to 2010 estimated tax <input checked="" type="checkbox"/> 67,460. Refunded <input type="checkbox"/> . . . . .		11	63,694.

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . .		X
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		
c Did the foundation file Form 1120-POL for this year? . . . . .		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ (2) On foundation managers <input checked="" type="checkbox"/> \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .		X
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 instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes . . . . .		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .		X
b If "Yes," has it filed a tax return on Form 990-T for this year? . . . . .		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . .		X
If "Yes," attach the statement required by General Instruction T		
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV . . . . .	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input checked="" type="checkbox"/> STMT 8		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation . . . . .	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV . . . . .		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses . . . . .	X	
		STMT 9



**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)****5a** During the year did the foundation pay or incur any amount to:(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? ☐ Yes ☒ NoOrganizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

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

If "Yes" to 6b, file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 10		36,000.	-0-	-0-

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

If none, enter "NONE."

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

**Total number of other employees paid over \$50,000** ☐ **NONE**

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3 Five highest-paid independent contractors for professional services** (see page 23 of the instructions). If none, enter "NONE."

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

Total number of others receiving over \$50,000 for professional services . . . . . NONE

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 NONE	
2	
3	
4	

**Part IX-B Summary of Program-Related Investments** (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments. See page 24 of the instructions	
3 NONE	
Total. Add lines 1 through 3 . . . . .	

Form 990-PF (2009)



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	8,143,435.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	6,009,436.
<b>c</b>	Fair market value of all other assets (see page 24 of the instructions)	<b>1c</b>	NONE
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	14,152,871.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	NONE
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	14,152,871.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	<b>4</b>	212,293.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	13,940,578.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	697,029.

**Part XI Distributable Amount** (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	697,029.
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	67,458.
<b>b</b>	Income tax for 2009. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	67,458.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	629,571.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	150,000.
<b>5</b>	Add lines 3 and 4	<b>5</b>	779,571.
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions)	<b>6</b>	NONE
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	779,571.

**Part XII Qualifying Distributions** (see page 25 of the instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	28,102,197.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	NONE
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	NONE
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	NONE
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	28,102,197.
<b>5</b>	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)	<b>5</b>	67,458.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	28,034,739.

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7 . . . . .				779,571.
<b>2</b> Undistributed income, if any, as of the end of 2009				
<b>a</b> Enter amount for 2008 only . . . . .			NONE	
<b>b</b> Total for prior years 20 <u>07</u> , 20____, 20____		NONE		
<b>3</b> Excess distributions carryover, if any, to 2009				
<b>a</b> From 2004 . . . . . 22,303,609.				
<b>b</b> From 2005 . . . . . 25,088,811.				
<b>c</b> From 2006 . . . . . 24,979,093.				
<b>d</b> From 2007 . . . . . NONE				
<b>e</b> From 2008 . . . . . 31,367,613.				
<b>f</b> Total of lines 3a through e . . . . .	103,739,126.			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4. ► \$ <u>28,102,197.</u>				
<b>a</b> Applied to 2008, but not more than line 2a . . . . .			NONE	
<b>b</b> Applied to undistributed income of prior years (Election required - see page 26 of the instructions) . . . . .		NONE		
<b>c</b> Treated as distributions out of corpus (Election required - see page 26 of the instructions) . . . . .	NONE			
<b>d</b> Applied to 2009 distributable amount . . . . .				779,571.
<b>e</b> Remaining amount distributed out of corpus . . . . .	27,322,626.			
<b>5</b> Excess distributions carryover applied to 2009 . (If an amount appears in column (d), the same amount must be shown in column (a).)	NONE			NONE
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	131,061,752.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		NONE		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . .		NONE		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see page 27 of the instructions . . . . .		NONE		
<b>e</b> Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see page 27 of the instructions . . . . .			NONE	
<b>f</b> Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010. . . . .				NONE
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) . . . . .	NONE			
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) . . . . .	22,303,609.			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a . . . . .	108,758,143.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2005 . . . . . 25,088,811.				
<b>b</b> Excess from 2006 . . . . . 24,979,093.				
<b>c</b> Excess from 2007 . . . . . NONE				
<b>d</b> Excess from 2008 . . . . . 31,367,613.				
<b>e</b> Excess from 2009 . . . . . 27,322,626.				

**Part XIV Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9) **NOT APPLICABLE**

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

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

4942(j)(3) or

4942(j)(5)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .

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

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 28 of the instructions.)**1 Information Regarding Foundation Managers:**

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

RUSSELL L CARSON

JUDITH M CARSON

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

N/A

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

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

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

c Any submission deadlines:

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

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

<b>Recipient</b> <b>Name and address (home or business)</b>	<b>If recipient is an individual,  show any relationship to  any foundation manager  or substantial contributor</b>	<b>Foundation  status of  recipient</b>	<b>Purpose of grant or  contribution</b>	<b>Amount</b>
<b>a</b> <i>Paid during the year</i>  SEE STATEMENT 11				
<b>Total</b> . . . . .			<b>3a</b>	27,988,435.
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> . . . . .			<b>3b</b>	

Enter gross amounts unless otherwise indicated.

(See worksheet in line 13 instructions on page 28 to verify calculations.)

Line No.

[illegible]

**Part XVII** Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations




1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
<b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash	1a(1)		X
(2) Other assets	1a(2)		X
<b>b</b> Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
(3) Rental of facilities, equipment, or other assets	1b(3)		X
(4) Reimbursement arrangements	1b(4)		X
(5) Loans or loan guarantees	1b(5)		X
(6) Performance of services or membership or fundraising solicitations	1b(6)		X
<b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X
<b>d</b> If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

**b If "Yes," complete the following schedule.**

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.			
Signature of officer or trustee 		Date 11/04/2010	Title SVP Tax
Paid Preparer's Use Only	Preparer's signature 	Date	Check if self-employed <input type="checkbox"/> Preparer's identifying number (See <b>Signature</b> on page 30 of the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code		EIN  Phone no.

Form 990-PF (2009)

Schedule of Contributors

► Attach to Form 990, 990-EZ, or 990-PF.

OMB No. 1545-0047

2009

Name of the organization

Employer identification number

UD CARSON FAM CHARITABLE TRUST

13-6957038

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. . . . . ► \$

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization  
UD CARSON FAM CHARITABLE TRUST

Employer identification number  
13-6957038

**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Russell Carson  New York, NY 10022-6815	\$ 6,500,000.	Person <input checked="checked" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)



**FORM 990-PF - PART IV**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
8818622.00		1076726. CENTENNIAL COMMUNCTNS CORP NEW PROPERTY TYPE: SECURITIES 2278661.00					11/28/2007 6539961.00	03/31/2009
3313816.00		360982.171 CMG ULTRA SHORT TERM BOND FUN PROPERTY TYPE: SECURITIES 3274108.00					03/30/2009 39,708.00	12/02/2009
1500000.00		163576.881 CMG ULTRA SHORT TERM BOND FUN PROPERTY TYPE: SECURITIES 1483642.00					03/30/2009 16,358.00	12/14/2009
1210000.00		132096.07 CMG ULTRA SHORT TERM BOND FUND PROPERTY TYPE: SECURITIES 1198111.00					03/30/2009 11,889.00	12/21/2009
TOTAL GAIN(LOSS) .....		.....					----- 6,607,916. =====	

FORM 990PF, PART I - OTHER INCOME  
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
FEDERAL TAX REFUND	4,295.	
LANDMARK SECONDARY PARTNERS IX LP		-12,597.
ACCOLADE PARTNERS, L.P.		27,366.
	-----	-----
TOTALS	4,295. =====	14,769. =====

## FORM 990PF, PART I - OTHER EXPENSES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	CHARITABLE PURPOSES -----
OTHER ALLOCABLE EXPENSE-PRINCI	1,848.		1,848.
OTHER ALLOCABLE EXPENSE-INCOME	750.		750.
DIVIDEND INVESTMENT EXPENSE -		26,124.	
TOTALS	----- 2,598. =====	----- 26,124. =====	----- 2,598. =====

UD CARSON FAM CHARITABLE TRUST

13-6957038

FORM 990PF, PART II - OTHER INVESTMENTS

=====

COST/  
FMV

C OR F

-----

DESCRIPTION

-----

OUTSIDE PARTNERSHIP

C

TOTALS

UD CARSON FAM CHARITABLE TRUST  
 FORM 990PF, PART II - OTHER ASSETS  
 =====

13-6957038

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ----
OUTSIDE INVESTMENTS	287,102. -----	287,102. -----
TOTALS	287,102. =====	287,102. =====

UD CARSON FAM CHARITABLE TRUST

13-6957038

FORM 990PF, PART II - OTHER FUNDS

=====

DESCRIPTION

-----

ENDING  
BOOK VALUE

-----

OUTSIDE INVESTMENT BALANCE

287,102.

TOTALS

-----

287,102.

=====

STATEMENT 5

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES  
=====

DESCRIPTION -----	AMOUNT -----
TYE INCOME ADJ	16,589.
	-----
TOTAL	16,589.
	=====

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES  
=====

DESCRIPTION -----	AMOUNT -----
PARTNERSHIP ADJ	642,043.
ROUNDING	1.
	-----
TOTAL	642,044.
	=====



UD CARSON FAM CHARITABLE TRUST

13-6957038

-----  
STATE(S) WHERE THE FOUNDATION IS REGISTERED  
=====

NY

STATEMENT 8

UD CARSON FAM CHARITABLE TRUST

13-6957038

FORM 990PF, PART VII-A - NEW SUBSTANTIAL CONTRIBUTORS  
=====

NAME AND ADDRESS  
-----

Russell Carson

New York, NY 10022-6815

STATEMENT 9

UD CARSON FAM CHARITABLE TRUST

13-6957038

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

=====

OFFICER NAME:

BANK OF AMERICA, N.A.

ADDRESS:

PO BOX 1802

PROVIDENCE, RI 02901

TITLE:

CO-TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 25

COMPENSATION ..... 28,000.

OFFICER NAME:

EDWARD S CARSON

ADDRESS:

114 WEST 47TH ST

NEW YORK, NY 10036

TITLE:

CO-TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 15

COMPENSATION ..... 8,000.

TOTAL COMPENSATION:

36,000.

=====

UD CARSON FAM CHARITABLE TRUST

13-6957038

FORM 990PF, PART XV, LINE 3 - CONTRIBUTIONS, GIFTS, GRANTS PAID

=====

RECIPIENT NAME:

CARSON FAMILY CHARITABLE TRUST

C/O RUSSELL CARSON

ADDRESS:

320 PARK AVE STE 2500

NEW YORK, NY 10022-6815

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

OPERATIONAL

FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 27,988,435.

TOTAL GRANTS PAID:

27,988,435.

=====

**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

UD CARSON FAM CHARITABLE TRUST

Employer identification number

13-6957038

**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)
<b>1a</b>					
<b>b</b> Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b . . . . .					<b>1b</b> 67,955.
<b>2</b> Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 . . . . .					<b>2</b>
<b>3</b> Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .					<b>3</b>
<b>4</b> Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet . . . . .					<b>4</b> ( )
<b>5</b> <b>Net short-term gain or (loss).</b> Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back . . . . . ►					<b>5</b> 67,955.

**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)
<b>6a</b>					
<b>b</b> Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b . . . . .					<b>6b</b> 6,539,961.
<b>7</b> Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 . . . . .					<b>7</b>
<b>8</b> Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .					<b>8</b>
<b>9</b> Capital gain distributions . . . . .					<b>9</b>
<b>10</b> Gain from Form 4797, Part I . . . . .					<b>10</b>
<b>11</b> Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet . . . . .					<b>11</b> ( )
<b>12</b> <b>Net long-term gain or (loss).</b> Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back . . . . . ►					<b>12</b> 6,539,961.

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

Schedule D (Form 1041) 2009

<b>Part III Summary of Parts I and II</b>		(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
<b>Caution: Read the instructions before completing this part.</b>				
<b>13</b>	<b>Net short-term gain or (loss)</b> . . . . .	<b>13</b>		67,955.
<b>14</b>	<b>Net long-term gain or (loss):</b>			
a	Total for year . . . . .	<b>14a</b>		6,539,961.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.) . . . . .	<b>14b</b>		
c	28% rate gain . . . . .	<b>14c</b>		
<b>15</b>	<b>Total net gain or (loss).</b> Combine lines 13 and 14a . . . . . ▶	<b>15</b>		6,607,916.

**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.

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

**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.

<b>Part V Tax Computation Using Maximum Capital Gains Rates</b>	
<b>Form 1041 filers.</b> Complete this part <b>only</b> 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.	
<b>Caution:</b> 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.	
<b>Form 990-T trusts.</b> Complete this part <b>only</b> 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.	

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

Schedule D (Form 1041) 2009

Department of the Treasury  
Internal Revenue Service

▶ See instructions for Schedule D (Form 1041).  
▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

2009

13-6957038

[illegible]

Schedule D-1 (Form 1041) 2009

Employer identification number

13-6957038

[illegible]

Schedule D-1 (Form 1041) 2009



149 BENEFICIARY DISTRIBUTIONS  
CARSON FAMILY CHARITABLE TRUST - 13-6957038

01/15/09	TOLEDO ZOOLOGICAL SOCIETY TOLEDO, OH INSTALLMENT 5 OF 5 FOR: 13-6957038 TR TRAN#=090150002000	TR CD=555	REG=0	PORT=PRIN	-500000.00	-500000.00 090100008 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
01/15/09	TURNAROUND FOR CHILDREN, INC. NEW YORK, NY INSTALLMENT 3 OF 3 FOR: 13-6957038 TR TRAN#=090150001000	TR CD=555	REG=0	PORT=PRIN	-500000.00	-500000.00 090100007 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
02/13/09	BETTY FORD CENTER AT EISENHOWER RANCHO MIRAGE, CA INSTALLMENT 1 OF 5 FOR: 13-6957038 TR TRAN#=090440001000	TR CD=555	REG=0	PORT=PRIN	-500000.00	-500000.00 090200006 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
02/13/09	HARLEM CHILDREN'S ZONE PROMISE NEW YORK, NY INSTALLMENT 3 OF 4 FOR: 13-6957038 TR TRAN#=090440002000	TR CD=555	REG=0	PORT=PRIN	-500000.00	-500000.00 090200007 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
03/11/09	ARCHDIOCESE OF NEW YORK NEW YORK, NY INSTALLMENT 1 OF 3 FOR: 13-6957038 TR TRAN#=090700002000	TR CD=555	REG=0	PORT=PRIN	-500000.00	-500000.00 090300005 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
03/20/09	CLASSROOM, INC. NEW YORK, NY INSTALLMENT 3 OF 5 FOR: 13-6957038 TR TRAN#=090790001000	TR CD=555	REG=0	PORT=PRIN	-100000.00	-100000.00 090300010 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
03/20/09	WNYC RADIO NEW YORK, NY INSTALLMENT 3 OF 4 FOR: 13-6957038 TR TRAN#=090790002000	TR CD=555	REG=0	PORT=PRIN	-250000.00	-250000.00 090300011 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
04/29/09	ABRAHAM HOUSE, INC. BRONX, NY INSTALLMENT 4 OF 5 FOR: 13-6957038 TR TRAN#=091190002000	TR CD=555	REG=0	PORT=PRIN	-100000.00	-100000.00 090400013 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
04/29/09	THE BERKSHIRE TACONIC COMMUNITY GREAT BARRINGTON, MA INSTALLMENT 3 OF 5 FOR: 13-6957038 TR TRAN#=091190003000	TR CD=555	REG=0	PORT=PRIN	-110000.00	-110000.00 090400014 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
04/29/09	OUT2PLAY, INC. NEW YORK, NY FOR: 13-6957038 TR TRAN#=091190001000	TR CD=555	REG=0	PORT=PRIN	-250000.00	-250000.00 090400012 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
04/29/09	CREDIT WHERE CREDIT IS DUE, INC. NEW YORK, NY INSTALLMENT 5 OF 5 FOR: 13-6957038 TR TRAN#=091190005000	TR CD=555	REG=0	PORT=PRIN	-500000.00	-500000.00 090400016 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
04/29/09	TEACHING MATTERS, INC. NEW YORK, NY INSTALLMENT 4 OF 5 FOR: 13-6957038 TR TRAN#=091190006000	TR CD=555	REG=0	PORT=PRIN	-500000.00	-500000.00 090400017 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
04/29/09	VILLAGE ACADEMIES, INC. NEW YORK, NY INSTALLMENT 4 OF 5 FOR: 13-6957038 TR TRAN#=091190007000	TR CD=555	REG=0	PORT=PRIN	-100000.00	-100000.00 090400018 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC
04/29/09	THE ENDOWMENT FOR INNER-CITY TRANSFER PRINCIPAL CASH TO				-1000000.00	-1000000.00 090400019 BENE DISTRIBUTION WITH NO SSN

TAX CODE/DATE TRANSACTIONS	TAXABLE	INCOME	PRINCIPAL	EDIT NUMBER
149 BENEFICIARY DISTRIBUTIONS (CONTINUED) CARSON FAMILY CHARITABLE TRUST - 13-6957038 (CONTINUED)				
ACCOUNT 41-16-102-5828764 NEW YORK, NY INSTALLMENT 1 OF 10 FOR: 13-6957038 TR TRAN#-091190008000 TR CD=711 REG=0 PORT=PRIN			**CHANGED** 05/04/10 KZC	
05/07/09 GODDARD RIVERSIDE COMMUNITY NEW YORK, NY INSTALLMENT 2 OF 4 FOR: 13-6957038 TR TRAN#-091270002000 TR CD=555 REG=0 PORT=PRIN	-125000.00	-125000.00	0905000005 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
05/07/09 COOKE CENTER FOR LEARNING AND NEW YORK, NY INSTALLMENT 3 OF 5 FOR: 13-6957038 TR TRAN#-091270003000 TR CD=555 REG=0 PORT=PRIN	-100000.00	-100000.00	0905000006 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
05/07/09 KIPP NEW YORK, INC. BRONX, NY INSTALLMENT 3 OF 5 FOR: 13-6957038 TR TRAN#-091270004000 TR CD=555 REG=0 PORT=PRIN	-400000.00	-400000.00	0905000007 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
05/27/09 ROBIN HOOD FOUNDATION NEW YORK, NY FOR: 13-6957038 TR TRAN#-091470001000 TR CD=555 REG=0 PORT=PRIN	-250000.00	-250000.00	0905000010 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
05/27/09 NEW YORK STEM CELL FOUNDATION, NEW YORK, NY INSTALLMENT 2 OF 3 FOR: 13-6957038 TR TRAN#-091470002000 TR CD=555 REG=0 PORT=PRIN	-100000.00	-100000.00	0905000011 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
05/29/09 MUSEUM OF ARTS AND DESIGN NEW YORK, NY 1ST PAYMENT OF 2 FOR: 13-6957038 TR TRAN#-091490001000 TR CD=555 REG=0 PORT=PRIN	-250000.00	-250000.00	0905000012 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/02/09 STUDENT SPONSOR PARTNERSHIP INC. NEW YORK, NY 2ND INSTALLMENT OF 5 FOR: 13-6957038 TR TRAN#-091530001000 TR CD=555 REG=0 PORT=PRIN	-200000.00	-200000.00	0906000005 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/09/09 GOOD SHEPHERD SERVICES NEW YORK, NY INSTALLMENT 4 OF 5 FOR: 13-6957038 TR TRAN#-091600001000 TR CD=555 REG=0 PORT=INC	-250000.00	-250000.00	0906000007 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/09/09 TRUSTEES OF COLUMBIA UNIVERSITY NEW YORK, NY RE-ISSUE OF 4/29/09 CHECK #15111709 DUE TO NON-RECEIPT FOR: 13-6957038 TR TRAN#-091600002000 TR CD=555 REG=0 PORT=PRIN	-2000000.00	-2000000.00	0906000008 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/16/09 UPWARDLY GLOBAL NEW YORK, NY INSTALLMENT 3 OF 4 FOR: 13-6957038 TR TRAN#-091670001000 TR CD=555 REG=0 PORT=PRIN	-100000.00	-100000.00	0906000014 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/24/09 FRIENDS OF THE CHILDREN NEW YORK NEW YORK, NY INSTALLMENT 2 OF 3 FOR: 13-6957038 TR TRAN#-091750008000 TR CD=555 REG=0 PORT=PRIN	-50000.00	-50000.00	0906000025 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/24/09 UNCOMMON SCHOOLS, INC. NEW YORK, NY INSTALLMENT 2 OF 5 FOR: 13-6957038 TR TRAN#-091750009000 TR CD=555 REG=0 PORT=PRIN	-500000.00	-500000.00	0906000026 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/24/09 NEW-YORK HISTORICAL SOCIETY NEW YORK, NY INSTALLMENT 2 OF 5 FOR: 13-6957038 TR TRAN#-091750001000 TR CD=555 REG=0 PORT=PRIN	-100000.00	-100000.00	0906000018 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	

TAX CODE/DATE	TRANSACTIONS	TAXABLE	INCOME	PRINCIPAL	EDIT NUMBER
149	BENEFICIARY DISTRIBUTIONS (CONTINUED) CARSON FAMILY CHARITABLE TRUST - 13-6957038 (CONTINUED)				
06/24/09	ROBERT A. TOIGO FOUNDATION OAKLAND, CA INSTALLMENT 9 OF 17 FOR: 13-6957038 TR TRAN#=091750002000 TR CD=555 REG=0 PORT=PRIN	-100000.00		-100000.00 0906000019 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/24/09	CHILDREN'S HEALTH FUND NEW YORK, NY INSTALLMENT 5 OF 5 FOR: 13-6957038 TR TRAN#=091750004000 TR CD=555 REG=0 PORT=PRIN	-250000.00		-250000.00 0906000021 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/24/09	CENTRAL PARK CONSERVANCY, INC. NEW YORK, NY INSTALLMENT 4 OF 5 FOR: 13-6957038 TR TRAN#=091750003000 TR CD=555 REG=0 PORT=PRIN	-500000.00		-500000.00 0906000020 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/24/09	NEW YORK PUBLIC LIBRARY NEW YORK, NY INSTALLMENT 3 OF 4 FOR: 13-6957038 TR TRAN#=091750005000 TR CD=555 REG=0 PORT=PRIN	-250000.00		-250000.00 0906000022 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/24/09	RICE HIGH SCHOOL NEW YORK, NY INSTALLMENT 4 OF 5 FOR: 13-6957038 TR TRAN#=091750006000 TR CD=555 REG=0 PORT=PRIN	-100000.00		-100000.00 0906000023 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
06/24/09	NEW-YORK HISTORICAL SOCIETY NEW YORK, NY INSTALLMENT 4 OF 5 FOR: 13-6957038 TR TRAN#=091750007000 TR CD=555 REG=0 PORT=PRIN	-100000.00		-100000.00 0906000024 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
07/08/09	TRUSTEES OF DARTMOUTH COLLEGE HANOVER, NH FIRST INSTALLMENT FOR: 13-6957038 TR TRAN#=091890002000 TR CD=555 REG=0 PORT=PRIN	-50000.00		-50000.00 0907000006 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
07/08/09	MARYMOUNT MANHATTAN COLLEGE NEW YORK, NY FOR: 13-6957038 TR TRAN#=091890003000 TR CD=555 REG=0 PORT=PRIN	-120000.00		-120000.00 0907000007 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
07/08/09	TRUSTEES OF COLUMBIA UNIVERSITY NEW YORK, NY FOR: 13-6957038 TR TRAN#=091890001000 TR CD=555 REG=0 PORT=PRIN	-25000.00		-25000.00 0907000005 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
07/10/09	LINCOLN CENTER FOR THE NEW YORK, NY INSTALLMENT 4 OF 5 FOR: 13-6957038 TR TRAN#=091910001000 TR CD=555 REG=0 PORT=PRIN	-1000000.00		-1000000.00 0907000010 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
07/10/09	URBAN EDUCATION EXCHANGE, INC. NEW YORK, NY INSTALLMENT 6 OF 7 FOR: 13-6957038 TR TRAN#=091910003000 TR CD=555 REG=0 PORT=PRIN	-100000.00		-100000.00 0907000012 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
07/10/09	HARVARD UNIVERSITY BOSTON, MA INSTALLMENT 9 OF 10 FOR: 13-6957038 TR TRAN#=091910002000 TR CD=555 REG=0 PORT=PRIN	-100000.00		-100000.00 0907000011 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
07/16/09	INTERNATIONAL RESCUE COMMITTEE, NEW YORK, NY INSTALLMENT 3 OF 5 FOR: 13-6957038 TR TRAN#=091970001000 TR CD=555 REG=0 PORT=PRIN	-100000.00		-100000.00 0907000016 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
07/16/09	NATIONAL SEPT 11 MEMORIAL AND NEW YORK, NY INSTALLMENT 5 OF 5 FOR: 13-6957038 TR TRAN#=091970002000 TR CD=555 REG=0 PORT=PRIN	-1000000.00		-1000000.00 0907000017 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
07/16/09	CENTER FOR NEW AMERICAN WASHINGTON, DC FOR: 13-6957038 TR TRAN#=091970004000 TR CD=555 REG=0 PORT=PRIN	-50000.00		-50000.00 0907000019 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	

TAX CODE/DATE TRANSACTIONS	TAXABLE	INCOME	PRINCIPAL	EDIT NUMBER
149 BENEFICIARY DISTRIBUTIONS (CONTINUED) CARSON FAMILY CHARITABLE TRUST - 13-6957038 (CONTINUED)				
07/16/09 NOTRE DAME SCHOOL OF MANHATTAN NEW YORK, NY FOR: 13-6957038 TR TRAN#-091970005000 TR CD=555 REG=0 PORT=PRIN	-100000.00		-100000.00 0907000020 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
07/16/09 FUND FOR THE CITY OF NEW YORK, NEW YORK, NY INSTALLMENT 4 OF 5 FOR: 13-6957038 TR TRAN#-091970003000 TR CD=555 REG=0 PORT=PRIN	-250000.00		-250000.00 0907000018 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
08/03/09 ST. LUKE'S-ROOSEVELT HOSPITAL NEW YORK, NY INSTALLMENT 2 OF 5 FOR: 13-6957038 TR TRAN#-092150002000 TR CD=555 REG=0 PORT=PRIN	-400000.00		-400000.00 0908000002 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
08/03/09 BEGINNING WITH CHILDREN NEW YORK, NY INSTALLMENT 4 OF 4 FOR: 13-6957038 TR TRAN#-092150001000 TR CD=555 REG=0 PORT=PRIN	-250000.00		-250000.00 0908000001 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
08/03/09 AMERICAN MUSEUM OF NATURAL NEW YORK, NY INSTALLMENT 2 OF 5 FOR: 13-6957038 TR TRAN#-092150003000 TR CD=555 REG=0 PORT=PRIN	-25000.00		-25000.00 0908000003 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
08/05/09 CITIZENS FOR NYC, INC. NEW YORK, NY INSTALLMENT 3 OF 3 FOR: 13-6957038 TR TRAN#-092170001000 TR CD=555 REG=0 PORT=PRIN	-100000.00		-100000.00 0908000007 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
08/12/09 NEIGHBORHOOD COALITION FOR NEW YORK, NY FOR: 13-6957038 TR TRAN#-092240001000 TR CD=555 REG=0 PORT=PRIN	-125000.00		-125000.00 0908000008 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
08/12/09 PHILHARMONIC - SYMPHONY SOCIETY NEW YORK, NY INSTALLMENT 3 OF 5 FOR: 13-6957038 TR TRAN#-092240002000 TR CD=555 REG=0 PORT=PRIN	-1000000.00		-1000000.00 0908000009 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
09/10/09 AMERICAN RED CROSS IN GREATER NEW YORK, NY CARSON FAMILY CHARITABLE TRUST FOR: 13-6957038 TR TRAN#-092530001000 TR CD=555 REG=0 PORT=PRIN	-220153.00		-220153.00 0909000004 **CHANGED** 05/04/10 KZC	
09/10/09 ST. MARK THE EVANGELIST SCHOOL NEW YORK, NY CARSON FAMILY CHARITABLE TRUST FOR: 13-6957038 TR TRAN#-092530002000 TR CD=555 REG=0 PORT=PRIN	-120000.00		-120000.00 0909000005 **CHANGED** 05/04/10 KZC	
09/11/09 VAIL VALLEY FOUNDATION, INC. VAIL, CO INSTALLMENT 3 OF 5 FOR: 13-6957038 TR TRAN#-092540001000 TR CD=555 REG=0 PORT=PRIN	-50000.00		-50000.00 0909000007 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
09/11/09 SPONSORS FOR EDUCATIONAL NEW YORK, NY INSTALLMENT 4 OF 4 FOR: 13-6957038 TR TRAN#-092540002000 TR CD=555 REG=0 PORT=PRIN	-250000.00		-250000.00 0909000008 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
10/06/09 FUTURES IN EDUCATION ENDOWMENT BROOKLYN, NY INSTALLMENT 3 OF 5 FOR: 13-6957038 TR TRAN#-092790001000 TR CD=555 REG=0 PORT=PRIN	-400000.00		-400000.00 0910000004 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
10/06/09 INNER-CITY SCHOLARSHIP FUND, INC NEW YORK, NY INSTALLMENT 3 OF 3 FOR: 13-6957038 TR TRAN#-092790002000 TR CD=555 REG=0 PORT=PRIN	-100000.00		-100000.00 0910000005 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
10/13/09 NEW YORK ACADEMY OF SCIENCES NEW YORK, NY INSTALLMENT 4 OF 5 FOR: 13-6957038 TR TRAN#-092860001000 TR CD=555 REG=0 PORT=PRIN	-100000.00		-100000.00 0910000006 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	

TAX. CODE/DATE TRANSACTIONS	TAXABLE	INCOME	PRINCIPAL	EDIT NUMBER
149 BENEFICIARY DISTRIBUTIONS (CONTINUED) CARSON FAMILY CHARITABLE TRUST - 13-6957038 (CONTINUED)				
10/19/09 COLLEGE SUMMIT, INC. CHICAGO, IL FOR NEW YORK PROGRAMS FOR: 13-6957038 TR TRAN#-092920001000 TR CD=555 REG=0 PORT=PRIN	-50000.00		-50000.00 0910000007 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
10/26/09 BRONX CHARTER SCHOOL FOR BRONX, NY INSTALLMENT 2 OF 3 FOR: 13-6957038 TR TRAN#-092990001000 TR CD=555 REG=0 PORT=PRIN	-100000.00		-100000.00 0910000009 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
10/26/09 ROBIN HOOD FOUNDATION NEW YORK, NY INSTALLMENT 5 OF 5 FOR: 13-6957038 TR TRAN#-092990003000 TR CD=555 REG=0 PORT=PRIN	-1000000.00		-1000000.00 0910000011 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
10/26/09 METROPOLITAN MUSEUM OF ART NEW YORK, NY INSTALLMENT 3 OF 4 FOR: 13-6957038 TR TRAN#-092990004000 TR CD=555 REG=0 PORT=PRIN	-2000000.00		-2000000.00 0910000012 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
10/26/09 COMMON GROUND COMMUNITY HDPC, NEW YORK, NY INSTALLMENT 3 OF 5 FOR: 13-6957038 TR TRAN#-092990002000 TR CD=555 REG=0 PORT=PRIN	-100000 00		-100000.00 0910000010 BENE DISTRIBUTION WITH NO SSN **CHANGED** 05/04/10 KZC	
11/18/09 URBAN ASSEMBLY, INC NEW YORK, NY INSTALLMENT 4 OF 4 CARSON FAMILY CHARITABLE TRUST FOR: 13-6957038 TR TRAN#-093220002000 TR CD=555 REG=0 PORT=PRIN	-300000.00		-300000 00 0911000007 **CHANGED** 05/04/10 KZC	
11/18/09 KENYON COLLEGE GAMBIER, OH INSTALLMENT 4 OF 10 CARSON FAMILY CHARITABLE TRUST FOR: 13-6957038 TR TRAN#-093220001000 TR CD=555 REG=0 PORT=PRIN	-100000 00		-100000 00 0911000006 **CHANGED** 05/04/10 KZC	
11/18/09 DOE FUND, INC. NEW YORK, NY INSTALLMENT 3 OF 5 CARSON FAMILY CHARITABLE TRUST FOR: 13-6957038 TR TRAN#-093220004000 TR CD=555 REG=0 PORT=PRIN	-200000 00		-200000 00 0911000009 **CHANGED** 05/04/10 KZC	
11/18/09 CHILDREN'S HEALTH FUND NEW YORK, NY INSTALLMENT 3 OF 4 CARSON FAMILY CHARITABLE TRUST FOR: 13-6957038 TR TRAN#-093220003000 TR CD=555 REG=0 PORT=PRIN	-500000 00		-500000 00 0911000008 **CHANGED** 05/04/10 KZC	
12/09/09 ST MARK THE EVANGELIST SCHOOL NEW YORK, NY FOR: 13-6957038 TR TRAN#-093430001000 TR CD=823 REG=0 PORT=PRIN	-448282.00		-448282 00 0912000004 **CHANGED** 05/04/10 KZC	
12/14/09 THE ENDOWMENT FOR INNER-CITY NEW YORK, NY FOR: 13-6957038 TR TRAN#-093480004000 TR CD=823 REG=0 PORT=PRIN	-70000 00		-70000 00 0912000009 **CHANGED** 05/04/10 KZC	
12/14/09 ROCKEFELLER UNIVERSITY NEW YORK, NY INSTALLMENT 6 OF 8 FOR: 13-6957038 TR TRAN#-093480003000 TR CD=823 REG=0 PORT=PRIN	-3000000 00		-3000000 00 0912000008 **CHANGED** 05/04/10 KZC	
12/15/09 AMERICAN RED CROSS IN GREATER NEW YORK, NY FOR: 13-6957038 TR TRAN#-093490001000 TR CD=823 REG=0 PORT=PRIN	-50000 00		-50000 00 0912000010 **CHANGED** 05/04/10 KZC	
12/15/09 TRUSTEES OF COLUMBIA UNIVERSITY NEW YORK, NY FOR: 13-6957038 TR TRAN#-093490002000 TR CD=823 REG=0 PORT=PRIN	-100000 00		-100000 00 0912000011 **CHANGED** 05/04/10 KZC	

TAX CODE/DATE TRANSACTIONS	TAXABLE	INCOME	PRINCIPAL	EDIT NUMBER
149 BENEFICIARY DISTRIBUTIONS (CONTINUED) CARSON FAMILY CHARITABLE TRUST - 13-6957038 (CONTINUED)				
12/15/09 DOE FUND, INC NEW YORK, NY FOR 13-6957038 TR TRAN#-093490003000 TR CD=823 REG=0 PORT=PRIN	-100000 00		-100000 00 0912000012 **CHANGED** 05/04/10 KZC	
12/15/09 THE ENDOWMENT FOR INNER-CITY NEW YORK, NY FOR 13-6957038 TR TRAN#-093490004000 TR CD=823 REG=0 PORT=PRIN	-50000 00		-50000 00 0912000013 **CHANGED** 05/04/10 KZC	
12/15/09 KENYON COLLEGE GAMBIER, OH FOR 13-6957038 TR TRAN#-093490005000 TR CD=823 REG=0 PORT=PRIN	-10000 00		-10000 00 0912000014 **CHANGED** 05/04/10 KZC	
12/15/09 TRUSTEES OF DARTMOUTH COLLEGE HANOVER, NH FOR 13-6957038 TR TRAN#-093490007000 TR CD=823 REG=0 PORT=PRIN	-100000 00		-100000 00 0912000016 **CHANGED** 05/04/10 KZC	
12/15/09 DUTCHESS LAND CONSERVANCY MILLBROOK, NY FOR 13-6957038 TR TRAN#-093490008000 TR CD=823 REG=0 PORT=PRIN	-25000 00		-25000 00 0912000017 **CHANGED** 05/04/10 KZC	
12/15/09 ROCKEFELLER UNIVERSITY NEW YORK, NY FOR 13-6957038 TR TRAN#-093490009000 TR CD=823 REG=0 PORT=PRIN	-100000 00		-100000 00 0912000018 **CHANGED** 05/04/10 KZC	
12/15/09 CONVENT OF THE SACRED HEART NEW YORK, NY FOR 13-6957038 TR TRAN#-093490006000 TR CD=823 REG=0 PORT=PRIN	-5000 00		-5000 00 0912000015 **CHANGED** 05/04/10 KZC	
12/15/09 METROPOLITAN MUSEUM OF ART NEW YORK, NY FOR 13-6957038 TR TRAN#-093490011000 TR CD=823 REG=0 PORT=PRIN	-100000 00		-100000 00 0912000020 **CHANGED** 05/04/10 KZC	
12/15/09 ASSOCIATION TO BENEFIT CHILDREN NEW YORK, NY FOR 13-6957038 TR TRAN#-093490012000 TR CD=823 REG=0 PORT=PRIN	-10000 00		-10000 00 0912000021 **CHANGED** 05/04/10 KZC	
12/15/09 PLANNED PARENTHOOD OF NEW YORK NEW YORK, NY FOR 13-6957038 TR TRAN#-093490010000 TR CD=823 REG=0 PORT=PRIN	-25000 00		-25000 00 0912000019 **CHANGED** 05/04/10 KZC	
12/15/09 NATIONAL PSORIASIS FOUNDATION PORTLAND, OR FOR 13-6957038 TR TRAN#-093490017000 TR CD=823 REG=0 PORT=PRIN	-5000 00		-5000 00 0912000026 **CHANGED** 05/04/10 KZC	
12/15/09 SAFE SPACE NYC, INC NEW YORK, NY FOR 13-6957038 TR TRAN#-093490013000 TR CD=823 REG=0 PORT=PRIN	-5000 00		-5000 00 0912000022 **CHANGED** 05/04/10 KZC	
12/15/09 INTERNATIONAL RESCUE COMMITTEE, NEW YORK, NY FOR 13-6957038 TR TRAN#-093490014000 TR CD=823 REG=0 PORT=PRIN	-25000 00		-25000 00 0912000023 **CHANGED** 05/04/10 KZC	
12/15/09 EXODUS HOUSE, INC NEW YORK, NY FOR 13-6957038 TR TRAN#-093490015000 TR CD=823 REG=0 PORT=PRIN	-10000 00		-10000 00 0912000024 **CHANGED** 05/04/10 KZC	
12/15/09 MARYMOUNT MANHATTAN COLLEGE NEW YORK, NY FOR 13-6957038 TR TRAN#-093490016000 TR CD=823 REG=0 PORT=PRIN	-100000 00		-100000 00 0912000025 **CHANGED** 05/04/10 KZC	
12/15/09 RESERVE ELDER SERVICES, INC BROOKLYN, NY FOR 13-6957038 TR TRAN#-093490018000 TR CD=823 REG=0 PORT=PRIN	-25000 00		-25000 00 0912000027 **CHANGED** 05/04/10 KZC	
12/15/09 COLLEGIATE SCHOOL, INC NEW YORK, NY FOR 13-6957038 TR TRAN#-093490019000 TR CD=823 REG=0 PORT=PRIN	-5000 00		-5000 00 0912000028 **CHANGED** 05/04/10 KZC	

ACCT L775 011005832287  
PREP 210 ADMN 40 INV ZZZ

US TRUST COMPANY OF NEW YORK  
TAX TRANSACTION DETAIL

PAGE 16  
RUN 10/21/2010  
02 54 30 PM

TAX CODE/DATE TRANSACTIONS	TAXABLE	INCOME	PRINCIPAL	EDIT NUMBER
<b>149 BENEFICIARY DISTRIBUTIONS (CONTINUED)</b>				
CARSON FAMILY CHARITABLE TRUST - 13-6957038 (CONTINUED)				
12/15/09 LITTLE SISTERS OF THE ASSUMPTION NEW YORK, NY FOR 13-6957038 TR TRAN#-093490020000 TR CD=823 REG=0 PORT=PRIN	-25000.00		-25000 00 0912000029 **CHANGED** 05/04/10 KZC	
12/15/09 MUSEUM OF ARTS AND DESIGN NEW YORK, NY FOR 13-6957038 TR TRAN#-093490021000 TR CD=823 REG=0 PORT=PRIN	-100000 00		-100000 00 0912000030 **CHANGED** 05/04/10 KZC	
12/15/09 ST. JOHN'S BREAD AND LIFE BROOKLYN, NY FOR 13-6957038 TR TRAN#-093490022000 TR CD=823 REG=0 PORT=PRIN	-50000 00		-50000 00 0912000031 **CHANGED** 05/04/10 KZC	
12/16/09 NEW YORK AND PRESBYTERIAN NEW YORK, NY INSTALLMENT 3 OF 6 FOR 13-6957038 TR TRAN#-093500001000 TR CD=823 REG=0 PORT=PRIN	-1500000 00		-1500000 00 0912000032 **CHANGED** 05/04/10 KZC	
12/22/09 AMERICAN SKIN ASSOCIATION, INC NEW YORK, NY INSTALLMENT 4 OF 5 FOR 13-6957038 TR TRAN#-093560001000 TR CD=823 REG=0 PORT=PRIN	-75000 00		-75000 00 0912000035 **CHANGED** 05/04/10 KZC	
12/22/09 BRONX PREPARATORY CHARTER SCHOOL BRONX, NY INSTALLMENT 5 OF 5 FOR 13-6957038 TR TRAN#-093560002000 TR CD=823 REG=0 PORT=PRIN	-50000 00		-50000 00 0912000036 **CHANGED** 05/04/10 KZC	
12/22/09 NEW YORK ACADEMY OF MEDICINE NEW YORK, NY INSTALLMENT 5 OF 5 FOR 13-6957038 TR TRAN#-093560003000 TR CD=823 REG=0 PORT=PRIN	-25000 00		-25000 00 0912000037 **CHANGED** 05/04/10 KZC	
12/22/09 CRISTO REY NEW YORK HIGH SCHOOL NEW YORK, NY INSTALLMENT 5 OF 5 FOR 13-6957038 TR TRAN#-093560004000 TR CD=823 REG=0 PORT=PRIN	-25000 00		-25000 00 0912000038 **CHANGED** 05/04/10 KZC	
12/22/09 MARYMOUNT MANHATTAN COLLEGE NEW YORK, NY INSTALLMENT 5 OF 5 FOR 13-6957038 TR TRAN#-093560005000 TR CD=823 REG=0 PORT=PRIN	-1000000 00		-1000000 00 0912000039 **CHANGED** 05/04/10 KZC	
12/28/09 RALPH LAUREN CENTER FOR CANCER INSTALLMENT 3 OF 5 FOR 13-6957038 TR TRAN#-093620005000 TR CD=823 REG=0 PORT=PRIN	-100000 00		-100000 00 0912000045 **CHANGED** 05/04/10 KZC	
12/28/09 MEMORIAL SLOAN-KETTERING CANCER INSTALLMENT 3 OF 5 FOR 13-6957038 TR TRAN#-093620002000 TR CD=823 REG=0 PORT=PRIN	-1000000 00		-1000000 00 0912000042 **CHANGED** 05/04/10 KZC	
12/28/09 NATIONAL ACADEMY OF SCIENCES INSTALLMENT 1 OF 3 FOR 13-6957038 TR TRAN#-093620003000 TR CD=823 REG=0 PORT=PRIN	-100000 00		-100000 00 0912000043 **CHANGED** 05/04/10 KZC	
12/28/09 NEIGHBORS TOGETHER CORP INSTALLMENT 3 OF 5 FOR 13-6957038 TR TRAN#-093620004000 TR CD=823 REG=0 PORT=PRIN	-50000.00		-50000 00 0912000044 **CHANGED** 05/04/10 KZC	
12/28/09 MATH FOR AMERICA, INC INSTALLMENT 3 OF 4 FOR 13-6957038 TR TRAN#-093620001000 TR CD=823 REG=0 PORT=PRIN	-250000 00		-250000 00 0912000041 **CHANGED** 05/04/10 KZC	
TOTAL CODE 149 - BENEFICIARY DISTRIBUTIONS	-27988435.00 =====	-250000 00 =====	-27738435 00 =====	



Statement Detail

# CARSON FAMILY CHARITABLE TRUST HI Holdings

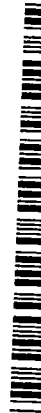
Period Ended December 31, 2009

## CASH, DEPOSITS & MONEY MARKET FUNDS

DEPOSITS & MONEY MARKET FUNDS							
MONEY MARKET FUNDS							
GOLDMAN SACHS INSTITUTIONAL LI ASSETS FEDERAL PORTFOLIO (ILA ADMINISTRATION UNITS)							
Quantity	Market Price	Market Value / Accrued Income	Unit Cost	Adjusted Cost / Original Cost	Unrealized Gain (Loss)	Yield to Maturity / Current Yield	Estimated Annual Income
3 220	1 0000	3 22	1 0000	3 22	0 00	0 0100	0 00
TOTAL PORTFOLIO							
		Market Value 3 22		Adjusted Cost / % Original Cost 3 22	Unrealized Gain (Loss) 0 00		Estimated Annual Income 0 00

<sup>6</sup> Original Cost is price paid by purchaser adjusted for annual original issue discount payments and/or return of capital adjustments, if applicable. Adjusted Cost reflects adjustments to Original Cost for accretion and/or amortization. Adjusted cost for GMS Portfolios and Alternative Investments are determined by inception to date contributions minus inception to date distributions.

Portfolio No 001-22149-8





Trade Date



Bank of America Private Wealth Management

**Portfolio Detail****Account:** 41-01-100-5832287 UD CARSON FAM CHARITABLE TRUST

Dec. 01, 2009 through Dec. 31, 2009

Units	Description	CUSIP	Market Value(1)/ Market Price	Accrued Income	Tax Cost/ Average Unit Cost	Unrealized Gain/Loss	Estimated Annual Income	Cur Yld/ YTM
<b>Cash/Currency</b>								
<b>Cash Equivalents</b>								
25,953.670	COLUMBIA DAILY CASH RESERVES TRUST CLASS (Income Investment)	19765J145	\$25,953.67	\$1.19	\$25,953.67 1.000	\$0.00	\$4.41	0.0%
125,187.010	COLUMBIA DAILY CASH RESERVES TRUST CLASS	19765J145	125,187.01	78.30	125,187.01 1.000	0.00	21.28	0.0
	<b>Total Cash Equivalents</b>		<b>\$151,140.68</b>	<b>\$79.49</b>	<b>\$151,140.68</b>	<b>\$0.00</b>	<b>\$25.69</b>	<b>0.0%</b>
	<b>Total Cash/Currency</b>		<b>\$151,140.68</b>	<b>\$79.49</b>	<b>\$151,140.68</b>	<b>\$0.00</b>	<b>\$25.69</b>	<b>0.0%</b>
<b>Fixed Income</b>								
<b>Investment Grade Taxable</b>								
59,993.169	CMG ULTRA SHORT TERM BOND FUND	19765E823	\$548,937.50 9.150	\$5,452.74	\$544,138.04 9.070	\$4,799.46	\$17,757.98	3.2%
	<b>Total Investment Grade Taxable</b>		<b>\$548,937.50</b>	<b>\$5,452.74</b>	<b>\$544,138.04</b>	<b>\$4,799.46</b>	<b>\$17,757.98</b>	<b>3.2%</b>
	<b>Total Fixed Income</b>		<b>\$548,937.50</b>	<b>\$5,452.74</b>	<b>\$544,138.04</b>	<b>\$4,799.46</b>	<b>\$17,757.98</b>	<b>3.2%</b>
<b>Private Equity</b>								
<b>Private Equity Specific Strategy</b>								
1.000	ACCOLADE PARTNERS LP	99C048008	\$502,912.00 502,912.000	\$0.00	\$325,000.00 325,000.000	\$177,912.00	\$0.00	0.0%
1.000	LANDMARK SECONDARY PARTNERS IX LP	99C047992	67,476.00 67,476.000	0.00	226,240.00 226,240.000	-158,764.00	0.00	0.0
	<b>Total Private Equity Specific Strategy</b>		<b>\$570,388.00</b>	<b>\$0.00</b>	<b>\$551,240.00</b>	<b>\$19,148.00</b>	<b>\$0.00</b>	<b>0.0%</b>
	<b>Total Private Equity</b>		<b>\$570,388.00</b>	<b>\$0.00</b>	<b>\$551,240.00</b>	<b>\$19,148.00</b>	<b>\$0.00</b>	<b>0.0%</b>

(1) Market Value in the Portfolio Detail section does not include Accrued Income.

6/18

6005191 001/001 6/18

0152614 02-004 405 T E

Trade Date



Bank of America Private Wealth Management

**Portfolio Detail**

Dec. 01, 2009 through Dec. 31, 2009

**Account:** 41-01-100-5832287 UD CARSON FAM CHARITABLE TRUST

Units	Description	CUSIP	Market Value(1)/ Market Price	Accrued Income	Average Unit Cost	Tax Cost/ Unit Cost	Unrealized Gain/Loss	Estimated Annual Income	Cur Yld/ YTM
<b>Real Estate</b>									
<b>Real Estate Other</b>									
1.000	LANDMARK EQUITY PARTNER VI LP	99C044635	\$3,812.00 3,812.000	\$0.00	\$376,965.00 376,965.000		-\$373,153.00	\$0.00	0.0%
	<b>Total Real Estate Other</b>		<b>\$3,812.00</b>	<b>\$0.00</b>	<b>\$376,965.00</b>		<b>-\$373,153.00</b>	<b>\$0.00</b>	<b>0.0%</b>
	<b>Total Real Estate</b>		<b>\$3,812.00</b>	<b>\$0.00</b>	<b>\$376,965.00</b>		<b>-\$373,153.00</b>	<b>\$0.00</b>	<b>0.0%</b>
	<b>Total Portfolio</b>		<b>\$1,274,278.18</b>	<b>\$5,532.23</b>	<b>\$1,623,483.72</b>		<b>-\$349,205.54</b>	<b>\$17,783.67</b>	<b>1.4%</b>
	Accrued Income		\$5,532.23						
	<b>Total</b>		<b>\$1,279,810.41</b>						

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**.  
**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

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

Type or print  File by the extended due date for filing the return. See instructions.	Name of Exempt Organization	Employer identification number
	UD CARSON FAM CHARITABLE TRUST	13-6957038
	Number, street, and room or suite no. If a P.O. box, see instructions.	For IRS use only
	BANK OF AMERICA N.A. 114 W 47TH ST NY8-114-07	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	PROVIDENCE, RI 02901-1802	

**Check type of return to be filed** (File a separate application for each return):

<input type="checkbox"/> Form 990	<input checked="" type="checkbox"/> Form 990-PF	<input type="checkbox"/> Form 1041-A	<input type="checkbox"/> Form 6069
<input type="checkbox"/> Form 990-BL	<input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust)	<input type="checkbox"/> Form 4720	<input type="checkbox"/> Form 8870
<input type="checkbox"/> Form 990-EZ	<input type="checkbox"/> Form 990-T (trust other than above)	<input type="checkbox"/> Form 5227	

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

- The books are in the care of **PRIVATE BANK TAX SERVICES**  
 Telephone No. **(401) 278-6880** FAX No. \_\_\_\_\_
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 4 I request an additional 3-month extension of time until 11/15/2010.
- 5 For calendar year 2009, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_.
- 6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension ADDITIONAL TIME REQUESTED TO FILE A COMPLETE AND ACCURATE RETURN

<b>8a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>8a</b> \$	67,610.
<b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	<b>8b</b> \$	198,612.
<b>c Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>8c</b> \$	

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ▶

Title ▶

Date ▶

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

**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No. 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete **only Part I** and check this box ☒ **X**
  - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete **only Part II** (on page 2 of this form).
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*

<b>Type or print</b>  File by the due date for filing your return. See instructions.	Name of Exempt Organization <b>UD CARSON FAM CHARITABLE TRUST</b>	Employer identification number <b>13-6957038</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>BANK OF AMERICA N.A. 114 W 47TH ST NY8-114-07</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>PROVIDENCE, RI 02901-1802</b>	

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

<input type="checkbox"/> Form 990	<input type="checkbox"/> Form 990-T (corporation)	<input type="checkbox"/> Form 4720
<input type="checkbox"/> Form 990-BL	<input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust)	<input type="checkbox"/> Form 5227
<input type="checkbox"/> Form 990-EZ	<input type="checkbox"/> Form 990-T (trust other than above)	<input type="checkbox"/> Form 6069
<input checked="" type="checkbox"/> Form 990-PF	<input type="checkbox"/> Form 1041-A	<input type="checkbox"/> Form 8870

- The books are in the care of ► **PRIVATE BANK TAX SERVICES**

Telephone No. ► **(401) 278-6880**

FAX No. ► \_\_\_\_\_

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **08/16, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for

► ☒ calendar year **2009** or  
► ☐ tax year beginning \_\_\_\_\_, \_\_\_\_\_, and ending \_\_\_\_\_, \_\_\_\_\_.

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

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$ <b>67,610.</b>
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$ <b>198,612.</b>
<b>c Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$ _____

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

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