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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

2009

Department of the Treasury
Internal Revenue Service

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

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

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation LAWRENCE AND LILLIAN SOLOMON FUND, INC.		A Employer identification number 20-2631943
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 10 LAUREL AVENUE		B Telephone number 781-431-2577
	City or town, state, and ZIP code WELLESLEY, MA 02481		C If exemption application is pending, check here ☐
	H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 15,733,546. (Part I, column (d) must be on cash basis)		J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		146,127.	146,127.		STATEMENT 1
4 Dividends and interest from securities		253,193.	253,193.		STATEMENT 2
5a Gross rents		654.	654.		STATEMENT 3
b Net rental income or (loss) 654.					
6a Net gain or (loss) from sale of assets not on line 10		<607,663.>			STATEMENT 4
b Gross sales price for all assets on line 6a 2,485,843.					
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 allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		<49,502.>	<49,502.>		STATEMENT 5
12 Total Add lines 1 through 11		<257,191.>	350,472.		
13 Compensation of officers, directors, trustees, etc.		13,000.	0.		13,000.
14 Other employee salaries and wages		150,972.	0.		150,972.
15 Pension plans, employee benefits		36,696.	0.		36,696.
16a Legal fees STMT 6		172,418.	0.		172,418.
b Accounting fees STMT 7		40,723.	0.		40,723.
c Other professional fees					
17 Interest					
18 Taxes STMT 8		29,926.	18,969.		10,668.
19 Depreciation and depletion		1,164.	0.		
20 Occupancy		18,977.	0.		0.
21 Travel, conferences, and meetings		7,231.	0.		7,231.
22 Printing and publications					
23 Other expenses STMT 9		151,044.	35,355.		113,584.
24 Total operating and administrative expenses Add lines 13 through 23		622,151.	54,324.		545,292.
25 Contributions, gifts, grants paid		596,545.			596,545.
26 Total expenses and disbursements. Add lines 24 and 25		1,218,696.	54,324.		1,141,837.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<1,475,887.>			
b Net investment income (if negative, enter -0-)			296,148.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of year	
				(a) Book Value	(b) Book Value
Assets	1	Cash - non-interest-bearing	369,804.	1,651,258.	1,651,258.
	2	Savings and temporary cash investments			
	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			
	7	Other notes and loans receivable ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 10	5,001,903.	6,128,126.	5,897,730.
	c	Investments - corporate bonds STMT 11	4,005,615.	2,005,085.	643,309.
Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less: accumulated depreciation ▶			
	12	Investments - mortgage loans STMT 12	12,403,690.	10,566,984.	7,539,137.
	13	Investments - other			
	14	Land, buildings, and equipment: basis ▶ 5,987.			
		Less: accumulated depreciation STMT 13 ▶ 3,875.	2,108.	2,112.	2,112.
	15	Other assets (describe ▶)			
	16	Total assets (to be completed by all filers)	21,783,120.	20,353,565.	15,733,546.
	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			
	22	Other liabilities (describe ▶ STATEMENT 14)	80,518.	126,850.	
	23	Total liabilities (add lines 17 through 22)	80,518.	126,850.	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31			
	24	Unrestricted	21,702,602.	20,226,715.	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances	21,702,602.	20,226,715.	
	31	Total liabilities and net assets/fund balances	21,783,120.	20,353,565.	

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	21,702,602.
2	Enter amount from Part I, line 27a	2	<1,475,887.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	20,226,715.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	20,226,715.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b SEE ATTACHED STATEMENTS			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 2,485,843.		3,095,804.	<607,753.>

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			<607,753.>

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	<607,753.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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 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	1,153,396.	15,097,653.	.076396
2007	1,616,630.	23,317,746.	.069330
2006	1,133,796.	23,024,299.	.049243
2005	1,225,969.	22,451,018.	.054606
2004	1,020,254.	19,301,151.	.052860

2 Total of line 1, column (d)	2	.302435
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.060487
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	13,930,746.
5 Multiply line 4 by line 3	5	842,629.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,961.
7 Add lines 5 and 6	7	845,590.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	1,141,837.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	2,961.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		3	2,961.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	2,961.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 35,733.	7	35,733.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	32,772.
7 Total credits and payments. Add lines 6a through 6d		11	0.
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ☒ 32,772. Refunded ☒			

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ MA		
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)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes" attach a schedule listing their names and addresses		X

N/A

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► DAVID SOLOMON Located at ► 10 LAUREL AVENUE, WELLESLEY, MA	Telephone no. ► 781-431-2577 ZIP+4 ► 02481		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here		X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If "Yes," list the years ►	☐ Yes ☒ No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		X

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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)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
DAVID SOLOMON	DIRECTOR			
10 LAUREL AVENUE				
WELLESLEY, MA 02481	20.00	13,000.	0.	0.
HERBERT NOLAN	ASST. DIRECTOR			
10 LAUREL AVENUE				
WELLESLEY, MA 02481	30.00	139,772.	12,246.	24,450.
BETTY JANE KRINTZMAN	ASST. DIRECTOR			
10 LAUREL AVENUE				
WELLESLEY, MA 02481	3.00	39,424.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

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

Total number of other employees paid over \$50,000

1

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
GREENBURG TRAUIG ONE INTERNATIONAL PLACE, BOSTON, MA 02110	LEGAL	129,549.

Total number of others receiving over \$50,000 for professional services

1

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. ALL OF THE FOUNDATION'S ACTIVITIES WERE INDIRECT (NOT DIRECT) CHARITABLE ACTIVITIES ACCORDING TO REGULATION SECTION 53.4942(B)-(1)(B)(1).	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
3 All other program-related investments. See instructions.	
4	
Total. Add lines 1 through 3	0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	12,686,230.
b	Average of monthly cash balances	1b	1,456,659.
c	Fair market value of all other assets	1c	0.
d	Total (add lines 1a, b, and c)	1d	14,142,889.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	14,142,889.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	212,143.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	13,930,746.
6	Minimum investment return. Enter 5% of line 5	6	696,537.

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

1	Minimum investment return from Part X, line 6	1	696,537.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2,961.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,961.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	693,576.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	693,576.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	693,576.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	1,141,837.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,141,837.
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	5	2,961.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,138,876.

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.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				693,576.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007	65,825.			
e From 2008	1,153,396.			
f Total of lines 3a through e	1,219,221.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 1,141,837.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions) **	596,545.			
d Applied to 2009 distributable amount				545,292.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	148,284.			148,284.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,667,482.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,667,482.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008	1,070,937.			
e Excess from 2009	596,545.			

** SEE STATEMENT 15

Form 990-PF (2009)

N/A

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

☐ 4942(i)(3) or ☐ 4942(i)(5)

- 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(i)(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 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).)

NONE

- 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.

NONE

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 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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED LIST		SEE ATTACHED LIST	SEE ATTACHED LIST	596,545.
Total			▶ 3a	596,545.
b Approved for future payment				
Total SEE STATEMENT 16			▶ 3b	245,000.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	1000 IMPAC MTG HOLDINGS	P	04/23/06	08/10/09
b	5940 ISHARES TREASURY INFLATION	P	05/20/08	06/29/09
c	3270 ISHARES TREASURY INFLATION	P	05/20/08	08/10/09
d	3430 ISHARES BARCLAYS US AGGREGATE	P	05/20/08	06/29/09
e	6340 ISHARES BARCLAYS US AGGREGATE	P	05/20/08	08/10/09
f	1150 BREITBURN ENERGY	P	01/05/09	05/11/09
g	2000 BARRICK GOLD	P	10/16/07	08/10/09
h	29900 FIRST MAJESTIC SILVER	P	10/16/07	08/10/09
i	3200 GOLD FIELDS LTD NEW ADR	P	10/16/07	08/10/09
j	2100 MARKET VECTORS ETF TRUST GOLD MINERS	P	10/16/07	08/10/09
k	1500 NEWMONT MINING CORP	P	10/16/07	08/10/09
l	30000 URANIUM ENERGY CORP	P	10/16/07	08/10/09
m	4300 YAMANA GOLD	P	10/16/07	08/10/09
n	4628.19 ALPINE DYNAMIC DIVIDEND	P	VARIOUS	11/05/09
o	1500 ATLAS PIPELINE	P	03/22/07	04/08/09

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 1,995.		87,334.	<85,339.>
b 599,819.		644,033.	<44,214.>
c 328,730.		356,454.	<27,724.>
d 350,403.		351,090.	<687.>
e 646,925.		648,953.	<2,028.>
f 8,883.		10,088.	<1,205.>
g 68,275.		82,015.	<13,740.>
h 63,569.		76,363.	<12,794.>
i 37,846.		45,463.	<7,617.>
j 74,186.		89,116.	<14,930.>
k 61,026.		73,307.	<12,281.>
l 72,765.		87,409.	<14,644.>
m 38,565.		46,327.	<7,762.>
n 22,863.		61,542.	<38,679.>
o 2,467.		36,998.	<34,531.>

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<85,339.>
b			<44,214.>
c			<27,724.>
d			<687.>
e			<2,028.>
f			<1,205.>
g			<13,740.>
h			<12,794.>
i			<7,617.>
j			<14,930.>
k			<12,281.>
l			<14,644.>
m			<7,762.>
n			<38,679.>
o			<34,531.>

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7
If (loss), enter "-0-" in Part I, line 7 }

2

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c).
If (loss), enter "-0-" in Part I, line 8

3

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a 5000 COMPTON PETROLEUM		P	04/20/07	05/12/09
b 1500 EAGLE ROCK ENGY PARTNERS		P	03/22/07	05/01/09
c 5000 HARVEST ENERGY TRUST		P	02/16/07	12/22/09
d 1500 HILAND HOLDINGS GROUP		P	03/22/07	05/29/09
e 177 HILAND PARTNERS LP		P	03/22/07	12/07/09
f 66.5292 LUMINENT MTG CAP INC		P	05/10/07	05/29/09
g .75 MAGELLAN MIDSTREAM PTNRS		P	03/22/07	09/29/09
h 2000 NATURAL RESOURCE		P	03/22/07	08/24/09
i 1023.7554 RESOURCE CAPITAL		P	VARIOUS	VARIOUS
j 408 THORNBURG MORTGAGE		P	11/28/07	05/29/09
k 500 CITIGROUP		P	07/15/08	08/10/09
l LONG TERM CAPITAL GAINS FROM K-1S				
m SHORT TERM CAPITAL GAINS FROM K-1S				
n 1231 GAINS FROM K-1S				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 7,368.		52,500.	<45,132.>
b 5,589.		29,691.	<24,102.>
c 47,240.		115,296.	<68,056.>
d 2,378.		44,290.	<41,912.>
e 1,770.		9,887.	<8,117.>
f		600.	<600.>
g 28.		31.	<3.>
h 38,011.		65,505.	<27,494.>
i 3,176.		17,279.	<14,103.>
j		56,790.	<56,790.>
k 1,966.		7,443.	<5,477.>
l			<567.>
m			<8.>
n			2,783.
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<45,132.>
b			<24,102.>
c			<68,056.>
d			<41,912.>
e			<8,117.>
f			<600.>
g			<3.>
h			<27,494.>
i			<14,103.>
j			<56,790.>
k			<5,477.>
l			<567.>
m			<8.>
n			2,783.
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	<607,753.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
EATON VANCE	46,480.
FROM K-1S	2,027.
MORTGAGE INTEREST	97,620.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	146,127.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BANK OF AMERICA	136,596.	0.	136,596.
CHARLES SCHWAB	115,789.	0.	115,789.
FROM K-1S	808.	0.	808.
TOTAL TO FM 990-PF, PART I, LN 4	253,193.	0.	253,193.

FORM 990-PF RENTAL INCOME STATEMENT 3

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
FROM K-1'S	1	654.
TOTAL TO FORM 990-PF, PART I, LINE 5A		654.

FORM 990-PF

GAIN OR (LOSS) FROM SALE OF ASSETS

STATEMENT

4

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1000 IMPAC MTG HOLDINGS	1,995.	87,334.	0.	0.	<85,339.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
5940 ISHARES TREASURY INFLATION	599,819.	644,033.	0.	0.	<44,214.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
3270 ISHARES TREASURY INFLATION	328,730.	356,454.	0.	0.	<27,724.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
3430 ISHARES BARCLAYS US AGGREGATE	350,403.	351,090.	0.	0.	<687.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
6340 ISHARES BARCLAYS US AGGREGATE	646,925.	648,953.	0.	0.	<2,028.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1150 BREITBURN ENERGY	8,883.	10,088.	0.	0.	<1,205.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
2000 BARRICK GOLD	68,275.	82,015.	0.	0.	<13,740.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
29900 FIRST MAJESTIC SILVER	63,569.	76,363.	0.	0.	<12,794.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
3200 GOLD FIELDS LTD NEW ADR	37,846.	45,463.	0.	0.	<7,617.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
2100 MARKET VECTORS ETF TRUST GOLD MINERS	74,186.	89,116.	0.	0.	<14,930.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED DEPREC.	DATE ACQUIRED GAIN OR LOSS	DATE SOLD
1500 NEWMONT MINING CORP	61,026.	73,307.	0.	PURCHASED	10/16/07	08/10/09

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED DEPREC.	DATE ACQUIRED GAIN OR LOSS	DATE SOLD
30000 URANIUM ENERGY CORP	72,765.	87,409.	0.	PURCHASED	10/16/07	08/10/09

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED DEPREC.	DATE ACQUIRED GAIN OR LOSS	DATE SOLD
4300 YAMANA GOLD	38,565.	46,327.	0.	PURCHASED	10/16/07	08/10/09

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED DEPREC.	DATE ACQUIRED GAIN OR LOSS	DATE SOLD
4628.19 ALPINE DYNAMIC DIVIDEND	22,863.	61,452.	0.	PURCHASED	VARIOUS	11/05/09

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
1500 ATLAS PIPELINE	PURCHASED	03/22/07	04/08/09		
2,467.	36,998.	0.	0.	<34,531.>	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
5000 COMPTON PETROLEUM	PURCHASED	04/20/07	05/12/09		
7,368.	52,500.	0.	0.	<45,132.>	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
1500 EAGLE ROCK ENGY PARTNERS	PURCHASED	03/22/07	05/01/09		
5,589.	29,691.	0.	0.	<24,102.>	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
5000 HARVEST ENERGY TRUST	PURCHASED	02/16/07	12/22/09		
47,240.	115,296.	0.	0.	<68,056.>	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED DEPREC.	(F) DATE ACQUIRED GAIN OR LOSS	DATE SOLD
1500 HILAND HOLDINGS GROUP	2,378.	44,290.	0.	0.		05/29/09

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED DEPREC.	(F) DATE ACQUIRED GAIN OR LOSS	DATE SOLD
177 HILAND PARTNERS LP	1,770.	9,887.	0.	0.		12/07/09

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED DEPREC.	(F) DATE ACQUIRED GAIN OR LOSS	DATE SOLD
66.5292 LUMINENT MTG CAP INC	0.	600.	0.	0.		05/29/09

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED DEPREC.	(F) DATE ACQUIRED GAIN OR LOSS	DATE SOLD
.75 MAGELLAN MIDSTREAM PTNRS	28.	31.	0.	0.		09/29/09

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED		DATE SOLD
500 CITIGROUP	PURCHASED		07/15/08	08/10/09	
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
1,966.	7,443.	0.	0.	<5,477.>	

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
LONG TERM CAPITAL GAINS FROM K-1S		PURCHASED			
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
0.	0.	0.	0.	<567.>	

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
SHORT TERM CAPITAL GAINS FROM K-1S		PURCHASED			
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
0.	0.	0.	0.		<8.>

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
1231 GAINS FROM K-1S			PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
0.	0.	0.	0.	2,783.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
				PURCHASED		
	(E) DEPREC.	(F) GAIN OR LOSS				
	0.	0.	0.	0.		0.
NET GAIN OR LOSS FROM SALE OF ASSETS						<607,663.>
CAPITAL GAINS DIVIDENDS FROM PART IV						0.
TOTAL TO FORM 990-PF, PART I, LINE 6A						<607,663.>

FORM 990-PF	OTHER INCOME	STATEMENT	5
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
LOSSES FROM PARTNERSHIPS	<50,577.>	<50,577.>	
ROYALTIES FROM K-1'S	1,075.	1,075.	
TOTAL TO FORM 990-PF, PART I, LINE 11	<49,502.>	<49,502.>	

FORM 990-PF	LEGAL FEES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	172,418.	0.		172,418.
TO FM 990-PF, PG 1, LN 16A	172,418.	0.		172,418.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PAYROLL SERVICE	1,123.	0.		1,123.	
ACCOUNTING	39,600.	0.		39,600.	
TO FORM 990-PF, PG 1, LN 16B	40,723.	0.		40,723.	

FORM 990-PF	TAXES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PAYROLL TAXES	10,668.	0.		10,668.	
FOREIGN TAXES	17,503.	17,503.		0.	
FEDERAL TAX	289.	0.		0.	
PROPERTY TAXES	1,466.	1,466.		0.	
TO FORM 990-PF, PG 1, LN 18	29,926.	18,969.		10,668.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	9
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
AUTOMOBILE	4,324.	0.		4,324.	
COMPUTER	3,043.	0.		0.	
DUES AND SUBSCRIPTIONS	927.	927.		0.	
GRANT RELATED EXPENSES	34,876.	0.		34,876.	
INSURANCE-EMPLOYEE BENEFIT	59,797.	0.		59,797.	
INVESTMENT EXPENSES	5,296.	5,296.		0.	
MEALS & ENTERTAINMENT	5,303.	0.		5,303.	
MISCELLANEOUS	282.	0.		282.	
POSTAGE	1,385.	0.		1,183.	
STORAGE	1,648.	0.		1,415.	
SUPPLIES	932.	0.		2,755.	
TELEPHONE	3,649.	0.		3,649.	
STATE FEES	400.	0.		0.	
OTHER DEDUCTIONS K-1'S	5,088.	5,088.		0.	
GIFTS	50.	0.		0.	
LOAN MANAGEMENT FEE	7,044.	7,044.		0.	

MANAGEMENT FEE	17,000.	17,000.	0.
TO FORM 990-PF, PG 1, LN 23	151,044.	35,355.	113,584.

FORM 990-PF	CORPORATE STOCK	STATEMENT 10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITIES-BANK OF AMERICA	3,413,862.	3,010,698.
EQUITIES-SCHWAB	2,714,264.	2,887,032.
GLOBAL MINING	0.	0.
TOTAL TO FORM 990-PF, PART II, LINE 10B	6,128,126.	5,897,730.

FORM 990-PF	CORPORATE BONDS	STATEMENT 11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BRENTWOOD - BANK OF AMERICA	993,500.	132,509.
EATON VANCE-BANK OF AMERICA	1,011,585.	510,800.
BANK OF AMERICA - BONDS	0.	0.
TOTAL TO FORM 990-PF, PART II, LINE 10C	2,005,085.	643,309.

FORM 990-PF	MORTGAGE LOANS	STATEMENT 12
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MORTGAGE LOANS	10,566,984.	7,539,137.
TOTAL TO FORM 990-PF, PART II, LINE 12	10,566,984.	7,539,137.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 13

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
OFFICE EQUIPMENT	4,819.	3,313.	1,506.
COMPUTER	1,069.	562.	507.
TOTAL TO FM 990-PF, PART II, LN 14	5,888.	3,875.	2,013.

FORM 990-PF OTHER LIABILITIES STATEMENT 14

DESCRIPTION	BOY AMOUNT	EOY AMOUNT
ESCROW INTEREST - BOURQUE	666.	666.
ESCROW INTEREST - FERFEIRA	79,852.	79,852.
ESCROW HARWICH	0.	20,000.
ESCROWS - OTHER	0.	4,588.
ATLAS PAYABLE	0.	21,744.
TOTAL TO FORM 990-PF, PART II, LINE 22	80,518.	126,850.

FORM 990-PF

ELECTION UNDER REGULATIONS SECTION
53.4942(A)-3(D)(2) TO TREAT
EXCESS QUALIFYING DISTRIBUTIONS
AS DISTRIBUTIONS OUT OF CORPUS

STATEMENT 15

PURSUTANT TO REG. 53.4942(A)-3(D), FOR 2009, THE FOUNDATION ELECTS TO
TREAT \$596,545 AS BEING DISTRIBUTED OUT OF CORPUS.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
APPROVED FOR FUTURE PAYMENT

STATEMENT 16

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AMERICAN UNIVERSITY 4400 MASSACHUSETTS AVE. WASHINGTON, DC 20016	SCHOLARSHIPS	PUBLIC	20,000.
BOSTON COLLEGE 140 COMMONWEALTH AVE. CHESTNUT HILL, MA 02467	SCHOLARSHIPS	PUBLIC	75,000.
BOSTON CONSERVATORY 8 THE FENWAY BOSTON, MA 02215	SCHOLARSHIPS	PUBLIC	25,000.
BOSTON UNIVERSITY ONE SHERBORN ST., 7TH FL BOSTON, MA 02215	SCHOLARSHIPS	PUBLIC	75,000.
NEWTON WELLESLEY HOSPITAL 2014 WASHINGTON ST. NEWTON, MA 02462	NEW EMERGENCY ROOM	PUBLIC	25,000.
SUDBURY VALLEY TRUSTEES 18 WOLBACH RD. SUDBURY, MA 01776	LAND CONSERVATION	PUBLIC	25,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3B			245,000.

Form **4562**Department of the Treasury
Internal Revenue Service (99)

Name(s) shown on return

Depreciation and Amortization 990-PF
(Including Information on Listed Property)

▶ See separate instructions.

▶ Attach to your tax return.

OMB No 1545-0172

2009Attachment
Sequence No 67

Business or activity to which this form relates

Identifying number

LAWRENCE AND LILLIAN SOLOMON FUND, INC. FORM 990-PF PAGE 1**20-2631943****Part I Election To Expense Certain Property Under Section 179** Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount See the instructions for a higher limit for certain businesses	1	250,000.
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation	3	800,000.
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2008 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2010 Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year	14	535.
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property) (See instructions)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2009	17	602.
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B - Assets Placed in Service During 2009 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property		534.	5 YRS.	MQ	200DB	27.
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property	/		27 5 yrs	MM	S/L	
	/		27 5 yrs	MM	S/L	
i Nonresidential real property	/		39 yrs	MM	S/L	
	/			MM	S/L	

Section C - Assets Placed in Service During 2009 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs		S/L	
c 40-year	/		40 yrs.	MM	S/L	

Part IV Summary (See instructions)

21	Listed property. Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr.	22	1,164.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V**Listed Property** (Include automobiles, certain other vehicles, cellular telephones, certain computers, and property used for entertainment, recreation, or amusement.)**Note:** For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.**Section A - Depreciation and Other Information** (Caution: See the instructions for limits for passenger automobiles.)**24a** Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No **24b** If "Yes," is the evidence written? ☐ Yes ☐ No

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
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25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use**25****26** Property used more than 50% in a qualified business use

		%						
		%						
		%						

27 Property used 50% or less in a qualified business use

		%			S/L			
		%			S/L			
		%			S/L			

28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1**28****29** Add amounts in column (i), line 26. Enter here and on line 7, page 1**29****Section B - Information on Use of Vehicles**

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person.

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle	(b) Vehicle	(c) Vehicle	(d) Vehicle	(e) Vehicle	(f) Vehicle
30 Total business/investment miles driven during the year (do not include commuting miles)						
31 Total commuting miles driven during the year						
32 Total other personal (noncommuting) miles driven						
33 Total miles driven during the year Add lines 30 through 32						
34 Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No
35 Was the vehicle used primarily by a more than 5% owner or related person?						
36 Is another vehicle available for personal use?						

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons.

37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	Yes	No
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners.		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use?		

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.**Part VI** Amortization

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2009 tax year:					
43 Amortization of costs that began before your 2009 tax year					43
44 Total. Add amounts in column (f). See the instructions for where to report.					44

THE LAWRENCE AND LILLIAN SOLOMON FUND
YEAR ENDING DECEMBER 31, 2009

Date	Number	Charity	Category	Amount	
12/3/2009	2440	ACLU Of Massachusetts	Grant	10,000	
5/18/2009	2249	Agassiz Village	Grant:Health & Human Services	400	
12/3/2009	2442	Dana Farber	Grant:Health & Human Services	100	
4/6/2009	2212	American University	Grant:Education	5,000	
12/22/2009	2462	Amnesty International USA	Grant	15,000	
9/24/2009	2383	Bikes Not Bombs	Grant:open Space	500	
3/24/2009	2204	Boston Children's Chorus	Grant:Health & Human Services	5,000	
5/28/2009	2256	Boston College	Grant:Education	10,000	
5/15/2009	2245	Boston Conservatory	Grant:Education	5,000	
9/1/2009	2351	Boston Family Boat	Grant:open Space	5,000	
7/14/2009	2308	Boston Parks And Recreation Department	Grant:open Space	22,500	
2/17/2009	2174	Boston Parks Department Fund For Parks	Grant:open Space	30,247	
6/4/2009	2273	Celebrity Series Of Boston, Inc.	Grant:Arts & Culture	10,000	
7/14/2009	2310	Charles River Boat Clean Up	Grant:open Space	10,000	
6/18/2009	2288	City Parks Alliance	Grant:open Space	5,000	
4/30/2009	2227	Combined Jewish Philanthropies	Grant:jewish	5,000	
9/24/2009	2380	Combined Jewish Philanthropies	Grant:jewish	10,000	
2/3/2009	2162	Community Boating	Grant:open Space	1,798	
2/26/2009	2184	Community Boating	Grant:open Space	6,700	
9/10/2009	2361	Community Outreach Group, Inc.	Grant:Health & Human Services	1,000	
4/30/2009	2229	Constitution Project	Grant:Human Rights	7,500	
5/28/2009	2255	Constitution Project	Grant:Human Rights	10,000	
10/15/2009	2396	Crohn's & Colitis Foundation Of America	Grant:Health & Human Services	10,000	
6/9/2009	2278	D.C. Vote	Grant:Human Rights	10,000	
2/3/2009	2164	Emerald Necklace Conservancy	Grant:open Space	15,000	
2/24/2009	2182	Emerald Necklace Conservancy	Grant:open Space	2,500	
2/24/2009	2183	Emerald Necklace Conservancy	Grant:open Space	2,500	
7/2/2009	2302	Emerald Necklace Conservancy	Grant:open Space	5,000	
5/12/2009	2242	Esplanade Association	Grant:open Space	500	
1/20/2009	2158	Friends Of The IDF	Grant:jewish	5,000	
6/11/2009	2279	Friends Of The IDF	Grant:jewish	4,000	
3/12/2009	2185	Friends Of The Public Garden	Grant:open Space	10,000	
9/28/2009	2385	Friends Of The Public Garden	Grant:open Space	10,000	
5/15/2009	2248	Gould Academy	Grant:Education	10,000	
10/27/2009	2413	Handi Kids	Grant:Health & Human Services	5,000	
5/28/2009	2251	Island Alliance	Grant:open Space	5,000	
8/4/2009	2329	Island Alliance	Grant:open Space	5,000	
8/20/2009	2345	Island Alliance	Grant:open Space	10,000	
4/20/2009	2223	Israeli Guide Dogs For The Blind	Grant:jewish	100	
1/20/2009	2157	Jamaica Pond Project	Grant:open Space	7,500	
2/3/2009	2163	Jamaica Pond Project	Grant:open Space	2,000	

THE LAWRENCE AND LILLIAN SOLOMON FUND
YEAR ENDING DECEMBER 31, 2009

8/20/2009	2344	Jamaica Pond Project	Grant:open Space	7,500
4/30/2009	2228	JCHE	Grant:jewish	5,000
6/4/2009	2274	John Andrew Mazie Foundation	Grant:Health & Human Services	1,500
9/10/2009	2360	Juvenile Diabetes Research Foundation	Grant:Health & Human Services	1,000
8/20/2009	2343	Livable Streets Alliance	Grant:open Space	5,000
8/20/2009	2348	Mazie Foundation For The Ride	Grant:Health & Human Services	2,500
7/16/2009	2316	Murder Victims Families For Human Rights	Grant:Human Rights	10,000
8/20/2009	2347	Murray Levin Fund	Grant:Education	25,000
3/12/2009	2191	Museum Of Fine Arts	Grant:open Space	2,500
5/12/2009	2241	New Repertory Theatre	Grant:Arts & Culture	1,000
5/15/2009	2246	New Repertory Theatre	Grant:Arts & Culture	3,200
6/16/2009	2286	New Repertory Theatre	Grant:Arts & Culture	10,000
7/16/2009	2318	New Repertory Theatre	Grant:Arts & Culture	12,500
7/21/2009	2321	New Repertory Theatre	Grant:Arts & Culture	12,500
9/1/2009	2353	New Repertory Theatre	Grant:Arts & Culture	10,000
6/18/2009	2289	Newton Conservators	Grant:open Space	10,000
5/28/2009	2253	Newton-Wellesly Hospital	Grant:Health & Human Services	25,000
4/30/2009	2225	Perkins School For The Blind	Grant:Health & Human Services	10,000
2/12/2009	2172	Southwest Corridor Conservancy	Grant:open Space	2,600
9/24/2009	2381	St. Jude	Grant:Health & Human Services	1,500
5/28/2009	2254	StandDown Texas Project	Grant:Human Rights	15,000
6/4/2009	2271	Sudbury Valley Trustees	Grant:open Space	25,000
5/28/2009	2252	TEA	Grant:open Space	1,500
4/2/2009	2210	The Boston Conservatory	Grant:Education	3,500
6/4/2009	2270	The Boston Conservatory	Grant:Education	25,000
5/28/2009	2250	The Fund For Parks And Recreation	Grant:open Space	1,500
4/2/2009	2211	The Institute Of Contemporary Art	Grant:Arts & Culture	25,000
6/1/2009	2264	The Newton Conservators	Grant:open Space	5,000
12/15/2009	2456	The Trustees Of Reservation	Grant	10,000
3/17/2009	2199	UConn Foundation	Grant:Education	250
3/12/2009	2188	University Of Connecticut Foundation	Grant:Education	50
12/3/2009	2441	Walk Boston	Grant:open Space	1,000
6/9/2009	2277	Walker	Grant:Health & Human Services	5,000
12/10/2009	2453	Watertown Community Foundation	Grant	10,000
6/9/2009	2276	Watertown Historical Society	Grant:open Space	600
2/3/2009	2161	Wayland Charitable Committee	Grant:Health & Human Services	5,000
4/9/2009	2215	Wayland High Schoool Scholarship Commity	Grant:Education	10,000
			Total Grants	596,545

THE LAWRENCE AND LILLIAN SOLOMON FUND
YEAR ENDING DECEMBER 31, 2009

Charity	Address	
ACLU Of Massachusetts	125 Broad St., NY, NY 10004	
Agassiz Village	238 Bedford St. #8, Lexington, MA 02420	
Dana Farber	10 Brookline Place West, 6th fl, Brookline, MA 02445	
American University	4400 Massachusetts Ave , NW, Washington DC 20016	
Amnesty International USA	5 Pen Plaza, 16th Floor, New York, NY 10001-18110	
Bikes Not Bombs	18 Bartlett Square, Jamaica Plain, MA 02130	
Boston Children's Chorus	112 Shawmut Ave., Boston, MA 02118	
Boston College	140 Commonwealth Ave., Chestnut Hill, MA 02467	
Boston Conservatory	PO Box 230193, Boston, MA 02123	
Boston Family Boat	c/o John Rowse, 133 Paul Gore St., Jamaica Plain, MA 02130	
Boston Parks And Recreation Department	1010 Massachusetts Ave., Boston, MA 02118	
Boston Parks Department Fund For Parks	1010 Massachusetts Ave., Boston, MA 02118	
Celebrity Series Of Boston, Inc.	200 Park Plaza, Suite 102, Boston, MA 02116	
Charles River Boat Clean Up	26 Lakeview Rd., Framingham, MA 01701	
City Parks Alliance	2121 Ward Court, NW 5th FL, Washington DC 20037	
Combined Jewish Philanthropies	126 High Street, Boston, MA 02110-2700	
Combined Jewish Philanthropies	126 High Street, Boston, MA 02110-2700	
Community Boating	21 David Mugar Way, Boston, MA 02114	
Community Boating	21 David Mugar Way, Boston, MA 02114	
Community Outreach Group, Inc.	14 Buxton Lane, Waltham, MA 02451	
Constitution Project	1025 Vermont Blvd, NW, 3rd FL Washington DC 20005	
Constitution Project	1025 Vermont Blvd, NW, 3rd FL Washington DC 20005	
Crohn's & Colitis Foundation Of America	280 Hillside Avenue, Newton, MA 02494	
D.C. Vote	2000 P St., NW, Suite 200, Washington DC 20036	
Emerald Necklace Conservancy	Two Brookline Place, Brookline, MA 02445	
Emerald Necklace Conservancy	Two Brookline Place, Brookline, MA 02445	
Emerald Necklace Conservancy	Two Brookline Place, Brookline, MA 02445	
Emerald Necklace Conservancy	Two Brookline Place, Brookline, MA 02445	
Esplanade Association	10 Derne St., Boston, MA 02114	
Friends Of The IDF	154 Wells Avenue, Newton, MA 02459	
Friends Of The IDF	154 Wells Avenue, Newton, MA 02459	
Friends Of The Public Garden	87 Mt. Vernon Street, Boston, MA 02108	
Friends Of The Public Garden	87 Mt. Vernon Street, Boston, MA 02108	
Gould Academy	P.O. Box 860, Bethel, ME 04217	
Handi Kids	470 Pine Street, Bridgewater, MA 02324	
Island Alliance	408 Atlantic Avenue, Suite 228, Boston, MA 02110	
Island Alliance	408 Atlantic Avenue, Suite 228, Boston, MA 02110	
Island Alliance	408 Atlantic Avenue, Suite 228, Boston, MA 02110	
Israeli Guide Dogs For The Blind	732 S. Settlers Circle, Warrington, PA 18976	
Jamaica Pond Project	One First Ave , Boston, MA 02129	
Jamaica Pond Project	One First Ave., Boston, MA 02129	

THE LAWRENCE AND LILLIAN SOLOMON FUND

YEAR ENDING DECEMBER 31, 2009

Jamaica Pond Project	One First Ave., Boston, MA 02129	
JCHE	30 Wallingford Rd., Brighton, MA 02135	
John Andrew Mazie Foundation	1502 Wisteria Way, Wayland, MA 01778	
Juvenile Diabetes Research Foundation	26 Broadway 14th fl, New York, NY 10004	
Livable Streets Alliance	70 Pacific Street, Cambridge, MA 02139+D55	
Mazie Foundation For The Ride	1502 Wisteria Way, Wayland, MA 01778	
Murder Victims Families For Human Rights	2161 Massachusetts Ave., Cambridge, MA 02140	
Murray Levin Fund	595 Commonwealth Ave., #700 West, Boston, MA 02215	
Museum Of Fine Arts	465 Huntington Avenue, Boston, MA 02115	
New Repertory Theatre	200 Bexter Avenue, Watertown, MA 02472	
New Repertory Theatre	200 Bexter Avenue, Watertown, MA 02472	
New Repertory Theatre	200 Bexter Avenue, Watertown, MA 02472	
New Repertory Theatre	200 Bexter Avenue, Watertown, MA 02472	
New Repertory Theatre	200 Bexter Avenue, Watertown, MA 02472	
New Repertory Theatre	200 Bexter Avenue, Watertown, MA 02472	
Newton Conservators	PO Box 590011, Newton Centre, MA 02459	
Newton-Wellesly Hospital	2014 Washington St., Newton, MA 02462	
Perkins School For The Blind	175 N. Beacon St., Watertown, MA 02472	
Southwest Corridor Conservancy	36 River St., Boston, MA 02108	
St. Jude	501 St. Jude Place, Memphis, TN 38105	
StandDown Texas Project	PO Box 13475, Austin, TX 78711	
Sudbury Valley Trustees	18 Wolbach Rd., Sudbury, MA 01776	
TEA	10 Derne St., Boston, MA 02114	
The Boston Conservatory	8 The Fenway, Boston, MA 02215	
The Boston Conservatory	8 The Fenway, Boston, MA 02215	
The Fund For Parks And Recreation	1010 Massachusetts Ave., Boston, MA 02118	
The Institute Of Contemporary Art	955 Boylston St., Boston, MA 02115	
The Newton Conservators	PO Box 590011, Newton Centre, MA 02459	
The Trustees Of Reservation	396 Moose Hill St., Sharon, MA 02067	
UConn Foundation	2390 Alumni Dr., Unit 3206, Storrs, CT 06269	
University Of Connecticut Foundation	2390 Alumni Dr., Unit 3206, Storrs, CT 06269	
Walk Boston	Old City Hall, 45 School St, Boston, MA 02108	
Walker	1968 Central Ave., Needham, MA 02492	
Watertown Community Foundation	PO Box 334, Watertown, MA 02471	
Watertown Historical Society	28 Marshall St., Watertown, MA 02472	
Wayland Charitable Committee	12 Claypit Hill Rd., Wayland, MA 01778	
Wayland High Schoool Scholarship Commity	Wayland, MA 01778	

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TO THE ABOVE NAMED DEFENDANT: HUY DUC NGUYEN, a/k/a HIY DUC NGYEN, HUY DUC TRAN
A Complaint has been presented to his Court by the Plaintiff, Trinh Tran, seeking Declaratory Judgment.
You are summoned and required to serve upon Attorney Mark R. Meehan, Percy, Tedeschi & Associates, 4 Court St., Taunton, MA 02780, an answer to the complaint, within 20 days after said publication. If you fail to do so, default judgment will be sought for the relief demanded in the Complaint. Your Answer to the Complaint must be filed with the Clerk of this Court at Boston before service upon Plaintiff's attorney or within reasonable time thereafter.
Upon otherwise provided by Rule 13(a), your answer must state as a counterclaim any claim which you may have against the Plaintiff arising from the transaction or occurrence that is the subject matter of the Complaint or you will thereafter be barred from making such claim in any other action.
Witness, Barbara J. Rouse, Esquire, at Boston, the 26th day of October, 2010
Michael Joseph Donovan, Clerk/Magistrate
Oct 28, Nov 4, 11

LAWRENCE AND LILLIAN SOLOMON FUND

Notice is hereby given that the annual report, Form 990PF, at the above Foundation for the year 2009 is available for inspection at the principal office of the Foundation, 10 Laurel Avenue, Wellesley, MA 02481, (781) 431-2577, during business hours by any citizen who so requests within 180 days of the date of the publication of this notice.
Name of principal manager: David M. Solomon.
Nov 11

PROBATE CITATIONS | **PROBATE CITATIONS**

DIVORCE SUMMONS BY PUBLICATION

Docket No. MI10D4173DR
Commonwealth of Massachusetts
The Trial Court
Probate and Family Court
Middlesex Probate and Family Court
208 Cambridge Street
Cambridge, MA 02141
Elysa Amna Alvarez Khan
vs.
Qadeer Ur-Rehman Khan
To the Defendant:
The Plaintiff has filed a Complaint for Divorce requesting that the Court grant a divorce for **Desertion**.
The Complaint is on file at the Court.
An Automatic Restraining Order has been entered in this matter preventing you from taking any action which would negatively impact the current financial status of either party. See **Supplemental Probate Court Rule 411**.
You are hereby summoned and required to serve upon:

Agreement (except such as have been partially releas-

Units 3, 4, 5, 6, 7, 9, 10, 17, 18, 26, 27, 29, 31, 32, 33
Parking Spaces numbered 46, 48, 49, 50, 53, 54, 55
numbered 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 42, 43, 44 of the DNA Lofts Condominium, as set for Deeds in Book 44595 Page 265, as amended by the Deed of DNA Lofts Condominium dated February 27 County Registry of Deeds in Book 44605 Page 201, Amendment to Master Deed of DNA Lofts Condominium with the Suffolk County Registry of Deeds in Book 45 certain Third Amendment to Master Deed of DNA Lofts and recorded with the Suffolk County Registry of Deeds (collectively, the "Master Deed").

Together with the undivided percentage interest appurtenant to the areas and facilities of said condominium, as set forth in the Master Deed.

Together with the benefits of rights and easements appurtenant to the Master Deed.

Together with all rights and easements of the Mortgage, including the right to add phases to the Condominium, as amended.

The premises that constitute the Condominium as amended are described in said Mortgage and Security Agreement.

Those two certain parcels of land with the buildings thereon located in the County of Suffolk, Massachusetts, called Dorchester, bounded by Parcel 1

Beginning at a point in the Easterly line of Dorchester Avenue, the granted premises and the Northwesterly corner of the lot of Urann and thence running Easterly by said land now numbered thirty-seven feet to land formerly of Holbrook formerly of Holbrook two hundred twenty and 8/10 feet Easterly on said Crescent Avenue fourteen and 3/10 feet Easterly by land formerly of Jenkins, now said Parcel 2, and one hundred twelve and 6/10 feet to said Dorchester Avenue, seventy-seven and 7/10 feet to the

Containing 26,796 square feet of land.

Said premises are shown on "Plan of Land belonging to Charles Breck, Surveyor, and recorded with Suffolk County Registry of Deeds, Book 44595, Page 265.

Being the premises now numbered 944 Dorchester Avenue, Parcel 2
NORTHERLY: by Crescent Avenue, three hundred and one feet

EASTERLY: by land formerly of the heirs of Richard described, eighty-one and 4/10 feet more or less.

SOUTHERLY: by land formerly of the heirs of Richard described, by two lines measuring respectively, one hundred twelve and 1/10 feet, more or less; and

WESTERLY: by Dorchester Avenue, twenty-eight feet.

Excepting from the above described premises a gore of land which was taken to widen Crescent Avenue. Containing about 17,710 square feet of land.

Be any and all of said measurements or content more or less than as above stated, the premises be bounded, measured or described. Being the premises now numbered 942 on Dorchester Avenue, Parcel 2. For title reference see Book 17557, Page 014.

In the event of any typographical errors in the publication of the Mortgage shall control. Said premises shall also be subject to the benefit of any and all other restrictions, easements, mortgages, tax titles, municipal or other public taxes, assessments, liens, attachments and existing encumbrances of record created before, insofar as in force and applicable. Said premises shall be subject to all leases and tenancies having priority over said Mortgage, whether created before or at the time of said auction which are not subject to the claims in personal property installed by tenants or former owners of the premises, and to laws and ordinances including, but not limited to, laws and ordinances.

Terms of sale:
The highest bidder in the sale of the premises shall deposit with the Clerk of the Court a certified check in the amount of One Hundred Thousand Dollars (\$100,000) refundable as follows:

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒

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
	LAWRENCE AND LILLIAN SOLOMON FUND, INC.	20-2631943
	Number, street, and room or suite no. If a P.O. box, see instructions. 10 LAUREL AVENUE	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions WELLESLEY, MA 02481	

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

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

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

DAVID SOLOMON

- The books are in the care of ☒ 10 LAUREL AVENUE - WELLESLEY, MA 02481
Telephone No ☒ 781-431-2577 FAX No. ☒ 781-239-2932
- 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 NOVEMBER 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

FAIR MARKET VALUE OF CERTAIN ASSETS HAS NOT YET BEEN DETERMINED.

8a	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.	8a	\$	35,733.
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.	8b	\$	35,733.
c	Balance Due. 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	8c	\$	

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 David N. Solomon Title CPA Date 8/9/10

Form 8868 (Rev. 4-2009)