Form **990-PF**

Department of the Treasury
Internal Revenue Service (77)

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

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

OMB No 1545-0052

2009

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: National Life Group Charitable Foundation, Inc.

Number and street (or P O box number if mail is not delivered to street address): 1 National Life Drive | Room/suite:

City or town, state, and ZIP code: Montpelier VT 05604

A Employer identification number: 20-4818866

B Telephone number (see page 10 of the instructions): 802-229-3947

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 910,525

J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see 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)	723,200			
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	185	185	185	
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	598,853			
	b Gross sales price for all assets on line 6a 747,653				
	7 Capital gain net income (from Part IV, line 2)		598,853		
	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) (attach schedule)	0			
	11 Other income (attach schedule)				
	12 **Total.** Add lines 1 through 11	1,322,238	599,038	185	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	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) software maint,bank chg	5,935			
	24 **Total operating and administrative expenses.** Add lines 13 through 23	5,935	0	0	0
	25 Contributions, gifts, grants paid	336,950			336,950
	26 **Total expenses and disbursements.** Add lines 24 and 25	342,885	0	0	336,950
	27 Subtract line 26 from line 12				
	a **Excess of revenue over expenses and disbursements**	979,353			
	b **Net investment income** (if negative, enter -0-)		599,038		
	c **Adjusted net income** (if negative, enter -0-)			185	

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For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

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	End of year (c) Fair Market Value
Assets			
1 Cash—non-interest-bearing	504,922	410,660	410,660
2 Savings and temporary cash investments		500,000	500,000
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 15 of the instructions)			
7 Other notes and loans receivable (attach schedule) ▶			
Less. allowance for doubtful accounts ▶			
8 Inventories for sale or use			
9 Prepaid expenses and deferred charges			
10a Investments—U S and state government obligations (attach schedule)			
b Investments—corporate stock (attach schedule)			
c Investments—corporate bonds (attach schedule)			
11 Investments—land, buildings, and equipment basis ▶			
Less accumulated depreciation (attach schedule) ▶			
12 Investments—mortgage loans			
13 Investments—other (attach schedule)			
14 Land, buildings, and equipment basis ▶			
Less accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶ Securities in process settle		(135)	(135)
16 **Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	504,922	910,525	910,525
Liabilities			
17 Accounts payable and accrued expenses		650	
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 **Total liabilities** (add lines 17 through 22)	0	650	
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			
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	504,922	909,875	
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** (see page 17 of the instructions)	504,922	909,875	
31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	504,922	910,525	

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	504,922
2 Enter amount from Part I, line 27a	2	979,353
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	1,484,275
5 Decreases not included in line 2 (itemize) ▶ built in gain contributed stock	5	574,400
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	909,875

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	Akamai - publicly traded security	d		08/31/2009
b				
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	747,653		148,800	598,853
b				
c				
d				
e				

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				

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** 598,853

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8 . . . **3**

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	334,453	579,501	0.5771
2007	95,224	873,226	0.1090
2006	341,357	844,977	0.4040
2005			
2004			

2 **Total** of line 1, column (d)	2	1.0901
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	.363367
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	534,392
5 Multiply line 4 by line 3	5	194,180
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	5,990
7 Add lines 5 and 6	7	200,170
8 Enter qualifying distributions from Part XII, line 4	8	336,950

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.

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 ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter ______ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b	1	5,990
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	0
3	Add lines 1 and 2	3	5,990
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	5,990
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a: 153		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	153
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	5,837
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	0
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ **Refunded** ▶	11	0

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?	1a		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)?	1b		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?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ▶ $ ______ (2) On foundation managers. ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
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*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		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?	6	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*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ State of Vermont			
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*	8b	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*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		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?	13	X	

Website address ▶ www.nlgcf.com

14 The books are in care of ▶ Martha Trombley-Oakes Telephone no. ▶ (802) 229-7214
Located at ▶ 1 National Life Drive, Montpelier, VT ZIP+4 ▶ 05604

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 |

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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☒ No If "Yes," list the years ▶ 20 ___ , 20 ___ , 20 ___ , 20 ___			
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 page 20 of the instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20 ___ , 20 ___ , 20 ___ , 20 ___			
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)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		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?	4b		X

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)? **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? ☐ 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**

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b**

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 #1				

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				

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

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		

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

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	
Total. Add lines 1 through 3 . . . . ▶	0

Part X Minimum Investment Return (All domestic foundations must complete this part Foreign foundations, see page 24 of the 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	542,530
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	542,530
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	542,530
4	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see page 25 of the instructions)	4	8,138
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	534,392
6	**Minimum investment return.** Enter 5% of line 5	6	26,720

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)

1	Minimum investment return from Part X, line 6			1	26,720
2a	Tax on investment income for 2009 from Part VI, line 5	2a	5,990		
b	Income tax for 2009 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	5,990
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	20,730
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	20,730
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	20,730

Part XII Qualifying Distributions (see page 25 of the 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	336,950
b	Program-related investments—total from Part IX-B	1b	
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	336,950
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	5,990
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	330,960

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
1	Distributable amount for 2009 from Part XI, line 7				20,730
2	Undistributed income, if any, as of the end of 2009				
a	Enter amount for 2008 only				
b	Total for prior years 20____ ,20____ ,20____				
3	Excess distributions carryover, if any, to 2009				
a	From 2004				
b	From 2005				
c	From 2006 320,394				
d	From 2007 70,207				
e	From 2008 305,720				
f	**Total** of lines 3a through e	696,321			
4	Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 336,950				
a	Applied to 2008, but not more than line 2a			0	
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)	0			
d	Applied to 2009 distributable amount				20,730
e	Remaining amount distributed out of corpus	316,220			
5	Excess distributions carryover applied to 2009 (*If an amount appears in column (d), the same amount must be shown in column (a)*)	0			
6	**Enter the net total of each column as indicated below:**				
a	Corpus. Add lines 3f, 4c, and 4e Subtract line 5	1,012,541			
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 page 27 of the instructions		0		
e	Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f	Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9	**Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	1,012,541			
10	Analysis of line 9.				
a	Excess from 2005				
b	Excess from 2006 320,394				
c	Excess from 2007 70,207				
d	Excess from 2008 305,720				
e	Excess from 2009 316,220				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

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)

	Tax year (a) 2009	Prior 3 years (b) 2008	(c) 2007	(d) 2006	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					0
b 85% of line 2a	0	0	0	0	0
c Qualifying distributions from Part XII, line 4 for each year listed					0
d Amounts included in line 2c not used directly for active conduct of exempt activities					0
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	0	0	0	0	0
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter (1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test—enter ⅔ of minimum investment return shown in Part X, line 6 for each year listed					0
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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 27 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))

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 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

See attached paperwork - Statement #2

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

See attached paperwork - Statement #2

c Any submission deadlines.

See attached paperwork - Statement #2

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

See attached paperwork - Statement #2

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 Statement #3				
Total . . . . . . ▶ **3a**				336,950
b *Approved for future payment*				
Total . . . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See page 28 of the instructions)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	185	
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	598,853	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		599,038	0

13 **Total.** Add line 12, columns (b), (d), and (e) 13 599,038

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

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)
	None

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

			Yes	No
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?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
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
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d 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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

Signature of officer or trustee — Date: 3/10/10 — Title: Tax Officer

Paid Preparer's Use Only			
Preparer's signature	Date	Check if self-employed ☐	Preparer's identifying number (see **Signature** on page 30 of the instructions)
Firm's name (or yours if self-employed), address, and ZIP code		EIN	
		Phone no	

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	**Schedule of Contributors** ▶ Attach to Form 990, 990-EZ, or 990-PF.	OMB No 1545-0047 **2009**

Name of the organization	Employer identification number
National Life Group Charitable Foundation, Inc.	20-4818866

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 33⅓% 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	Employer identification number
National Life Group Charitable Foundation, Inc.	20-4818866

Part I **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	National Life Insurance Company 1 National Life Drive Montpelier, VT 05604	$ 723,200	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization: National Life Group Charitable Foundation, Inc.

Employer identification number: 20-4818866

Part II **Noncash Property** (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	Akamai Stock	$ 723,200	08/31/2009
		$	
		$	
		$	
		$	
		$	

National Life Group Charitable Foundation, Inc.
EIN 20-4818866

Statement #1

Part VIII

(a) Name and Address	(b) Title and avg hrs per week	(c) Comp	(d) Benefits	(e) Expense

OFFICERS

Martha E. Trombley Oakes National Life Group	President & CEO Varies	0	0	0
Thomas H. Brownell National Life Group	Chief Invest Officer Varies	0	0	0
Robert E Cotton National Life Group	Treasurer Varies	0	0	0
James K McQueston National Life Group	Secretary Varies	0	0	0
Rhonda J Miller National Life Group	Assist Sec Varies	0	0	0
Kelly Fournier National Life Group	Assist Sec Varies	0	0	0
Janet S. Astore National Life Group	Tax Officer Varies	0	0	0
Jeffrey M. Kemp National Life Group	Tax Officer Varies	0	0	0
David Soccodato National Life Group	Tax Officer Varies	0	0	0

CORPORATE DIRECTORS

Thomas H MacLeay National Life Group	Chairman Varies	0	0	0
Mehran Assadi National Life Group	Director Varies	0	0	0
Christopher Graff National Life Group	Director Varies	0	0	0
Martha E. Trombley-Oakes National Life Group	Director Varies	0	0	0

Statement #2

ein 20-4818866

National Life Group's Charitable Foundation helps build healthy and vital communities.

Our grants vary in size with roughly 80% under $5000; we are seldom able to fund an entire program. Our expectations are high, however. We look for proposals from organizations with:

- A well-planned approach to underlying issues or needs
- A base of support
- A committed and skilled leadership team

We try to be a catalyst, providing funds to help organizations explore or undertake new work or do more effectively what they are already doing. Thus, we emphasize one-time grants rather than continuing support.

What we fund:

We look for projects that address a clearly defined community need. We will consider proposals in any category, although we favor those that focus on children and families, health and human services, the environment and the arts.

Since most of our employees and retirees and their families live in Central Vermont, an area with a sparse population and a thin base of charitable capital, NL Group commits a substantial percentage of its charitable giving to Washington County.

View a list of organizations we've helped recently.

What we don't fund:

We do not generally make grants for endowments, operating expenses (with the exception of a one-time initial planning expense), higher educational institutions (with the exception of the employee matching program), religious purposes, labor and fraternal groups, debt reduction or work that has already been completed. Additionally, we do not make grants to individuals, daycare *facilities* and school trips. Finally, we do not make grants to organizations that discriminate in any way on the basis of race, religion, gender, age, national origin, disability or sexual orientation.

Follow these steps to successfully submit your application for a grant.

What we look for:

In reviewing proposals, we look for projects that:

1. Meet well-defined community needs
2. Use data to define needs and measure impact
3. Encourage cooperation and *collaboration among* service providers
4. Promote community involvement
5. Foster self-reliance
6. Focus on prevention as well as treatment
7. Build on programs that have proven successful elsewhere or provide new models or approaches
8. Help non-profit agencies operate more efficiently and lessen their environmental footprint

Who is eligible:

To be considered for a grant, an organization must be a public charity located in or serving the people of Vermont, which is exempt from income taxes under section 501(c)(3) of the Internal Revenue Code (and not classified as a private foundation), or be a public agency/unit of government in the State of Vermont.

When to Apply:

Decisions for grant requests over $5000 are made two times a year first week in Oct and first week in April. We will notify you of the result of your application within six weeks of the deadline Requests under $5000 can be submitted at anytime. We will notify you within six weeks after submitting your request. If you haven't head from us it means the decision has yet to be made Please don't call - it takes time away from reviewing grants!

How much to ask for:

Requests for support exceed our capacity to fund them Therefore, requests should be appropriate to the project, reflect realistic expectations and show diverse funding sources Also keep in mind, 80% of the grants awarded are under $5000. Please know that requesting an appropriate amount is best, but that sometimes we fund a percentage of a request In other words, a grant requesting $5,000 may be funded at the $3,000 level.

How your application will be evaluated:

These are the major considerations we will use to evaluate your proposal

- Is it compatible with our guidelines?
- Is the need being addressed well-documented?
- Is there a base of support for the agency addressing the need?
- Is there evidence of collaboration with others?
- Is there committed leadership available?
- How does the project foster healthy and vital communities in Central Vermont?

Once you successfully receive a grant from the Foundation, we like to be updated once a year via a short email (example) or by forwarding us a newspaper article on the new program or work funded through our grant Building awareness and getting publicity play heavily into consideration of further grant or in-kind assistance to your non-profit

An important component of your application is an Executive Summary (200 words or less including the most pertinent information and data. It must be able to stand alone, meaning if someone reads it they could make an informed decision about the request The name of the organization and contact email must be included). Here is an example

of a well written Executive Summary.

NATIONAL LIFE GROUP CHARITABLE FOUNDATION, INC.

APPLICATION FOR GRANTS UNDER $1000
2009-2010

Date:__________

Organization's name:______________

Address:________________________
____
____

Name and title of contact person:___________________________

Phone number:____________

Project name:__________________

Grant amount requested:_________ **Total project budget:** _______

Is there an urgency for the requested donation? _______________

Please keep in mind, reviews are done periodically You will hear from us within six weeks of submitting your application.

Separate items to include:

1. Executive summary (200 words or less including the most pertinent information and data. It must be able to stand alone, meaning if someone reads it they could make an informed decision about the request. The name of the organization and contact email must be included).

2. Letter from IRS verifying your 501(c)(3) tax exempt status

3. Project budget including income (in hand and expected) and expenses

4. List of other sources of funding

Mail your application to:
Martha Trombley Oakes, M520
National Life Group Charitable Foundation
One National Life Drive
Montpelier, VT 05604

To expedite your application please make sure to fill it out in its entirety.

NATIONAL LIFE GROUP CHARITABLE FOUNDATION, INC.

COVER SHEET FOR GRANTS OVER $1000
2009-2010

Date:__________

Organization's name:______________

Project name:__________________

Address:_________________________

____

____

Name and title of contact person:___________________________

Phone number:____________

Grant amount requested:__________ **Total project budget:** ________

Is there an urgency for the requested donation? ________________

Decisions for grant requests over $5000 are made two times a year; first week in Oct and first week in April We will notify you of the result of your application within six weeks of the deadline. Requests under $5000 can be submitted at anytime We will notify you within six weeks after submitting your request.

Mail your grant request to:
Martha Trombley Oakes, M520
National Life Group Charitable Foundation
One National Life Drive
Montpelier, VT 05604

Application for Grants Over $1000

1. Completed cover sheet
2. A one to two page narrative (in no less than 12-pt font) that briefly outlines:
    a. the need you are addressing
    b. how you know it is a need (evidence/data)
    c. what activities you plan as a response to the need (what you will measure or count to know you are successful?)
    d. people who will benefit (description by age, geography, number, etc.)
    e. sustainability of your response to the need
    f. project's timetable
    g. personnel involved and their qualifications.

3. Project Budget including income (in hand and expected) and expenses
4. List of your Board of Directors
5. Letter from IRS verifying your public charity status as a 501(c),(3) tax exempt organization
6. Most recent audited financial statement
7. Executive summary (200 words or less including the most pertinent information and data. It must be able to stand alone, meaning if someone reads it they could make an informed decision about the request. The name of the organization and contact email must be included).

National Life Group Charitable Foundation, Inc. Company #730		
EIN 20-4818866		
January 1, 2009 - December 31, 2009		
ORGANIZATION (Act.#536009)	Date	2009
Emerging Women Projects	01/09/2009	$1,000
Montshire Museum of Science	01/09/2009	$3,000
The Nature Conservancy	01/09/2009	$5,000
North Branch Nature Center	01/09/2009	$3,000
Studio Place Arts	01/09/2009	$3,500
United Way	01/09/2009	$35,000
Vermont Association for Mental Health	01/09/2009	$2,000
Vermont C.A.R.E.S	01/09/2009	$4,000
Vermont Mountaineers	01/09/2009	$10,000
Washington County Youth Service Bureau	01/09/2009	$5,000
Vermont Adaptive Ski and Sports	01/10/2009	$2,500
Snelling Center for Government	01/14/2009	$10,000
Spaulding High School	01/14/2009	$300
Vermont JumpStart Coalition	01/20/2009	$5,000
Aldrich Library	01/21/2009	$500
Vermont Symphony Orchestra	01/30/2009	$25,000
Central Vermont Medical Center	02/12/2009	$30,000
The Green Mountain Club	02/12/2009	$3,000
Kids on The Block-Vermont	02/12/2009	$2,000
Women Helping Battered Women	02/12/2009	$3,000
Woodbury Institute of Champlain College	02/12/2009	$4,000
Vermont Foodbank	03/04/2009	$15,000
Center for an Agricultural Economy	03/12/2009	$750
Community Health Center of Burlington	03/12/2009	$950
Governor's Institutes of Vermont	03/12/2009	$3,000
Green Mountain Youth Symphony	03/12/2009	$1,000
Lost Nation Theater	03/12/2009	$10,000
Multiple Sclerosis Society	03/12/2009	$2,500
National Alliance on Mental Illness - Vermont	03/12/2009	$1,000
Shelburne Museum	03/12/2009	$4,500
Vermont Foster/Adoptive Family Association	03/12/2009	$1,000
Vermont Horse-Assisted Therapy, Inc.	03/12/2009	$500
Vermont Peace Academy	03/12/2009	$5,000
Vermont Youth Orchestra Association	03/12/2009	$3,000
Green Up Vermont	03/19/2009	$3,000
Fairbanks Museum & Planetarium	03/30/2009	$3,000
Institute for Social Ecology	03/30/2009	$1,000
Interfaith Nutrition Network	03/30/2009	$10,000
Monteverdi Music School	03/30/2009	$2,000
Special Olympics of Vermont	03/30/2009	$1,000
Town of Worcester	03/30/2009	$1,000
Twinfield Union School	03/30/2009	$200
Vermont Children's Aid Society	03/30/2009	$3,000

National Life Group Charitable Foundation, Inc. Company #730		
EIN 20-4818866		
January 1, 2009 - December 31, 2009		
Vermont Works for Women	03/30/2009	$3,000
Boys & Girls Club of Burlington	04/03/2009	$1,500
Central Vermont Humane Society	04/03/2009	$10,000
EarthWalk Vermont	04/03/2009	$3,000
Friends of the Winooski River	04/03/2009	$500
March of Dimes	04/03/2009	$50
The Trust for Public Land	04/03/2009	$10,000
Vermont Humanities Council	04/03/2009	$2,000
Vermont Law School	04/03/2009	$10,000
Voices for Vermont's Children	04/09/2009	$3,500
The Hungry Rat Revue - MHS	04/10/2009	$500
Rebuilding Together-Greater Burlington	04/10/2009	$3,000
March of Dimes	04/20/2009	$50
Barre Partnership	05/06/2009	$500
Operation Smile	05/06/2009	$500
Twinfield Together Mentoring Program	05/06/2009	$3,000
Lost Nation Theater	06/03/2009	$500
Living Classics Theater (Legacy Performing Art)	06/08/2009	$500
Make A Wish	06/08/2009	$50
The Veterans' Place, Inc.	06/08/2009	$10,000
Stowe Historical Society	06/08/2009	$2,500
Central Vermont Adult Basic Education	07/01/2009	$5,000
Capital City Concerts	07/21/2009	$3,000
Vermont Refugee Assistance, Inc.	09/22/2009	$1,000
Milton High School	09/24/2009	$200
Central Vermont Public Service	10/30/2009	$2,000
COTS (Committee on Temporary Shelter	10/30/2009	$3,000
Keeping Track	10/30/2009	$2,000
Montshire Museum of Science	10/30/2009	$3,000
People's Heaht & Wellness Clinic	10/30/2009	$5,000
Rhythm of the Rein	10/30/2009	$1,000
Vermont Foodbank	11/18/2009	$2,044
Spaulding High School	11/26/2009	$300
Grace Flight	11/30/2009	$250
Vermont Youth Conservation Corps	12/03/2009	$3,000
Battered Women's Services and Shelter	12/23/2009	$4,000
TOTAL		**$328,644**

National Life Group Charitable Foundation, Inc. Company #730		
EIN 20-4818866		
January 1, 2009 - December 31, 2009		
Employee Educational Matching Program (Act.# 5	**Date**	
UCLA	01/05/2009	$25
Middlebury College	01/09/2009	$500
University of Texas at Austin	02/12/2009	$500
Champlain College	03/25/2009	$20
University of Vermont	03/30/2009	$50
Lyndon State	04/10/2009	$101
Vermont College of Fine Arts	04/21/2009	$500
College of St. Joseph	06/11/2009	$500
Webb Institute	06/11/2009	$500
St. Michael's College	06/30/2009	$500
Champlain College	08/04/2009	$50
Community College of Vermont	10/30/2009	$500
Plymouth State	11/07/2009	$35
Brigham Young University	11/16/2009	$500
University of Vermont	11/16/2009	$25
Bowdoin College	11/18/2009	$500
University of Vermont	11/23/2009	$25
Harvard University	12/02/2009	$75
University of Michigan	12/02/2009	$50
Champlain College	12/07/2009	$100
University of Vermont	12/14/2009	$150
Middlebury College	12/15/2009	$500
Bates College	12/23/2009	$100
Caldwell College	12/23/2009	$150
Community College of Vermont	12/23/2009	$500
Purdue University	12/23/2009	$500
TOTAL		**$6,956**

National Life Group Charitable Foundation, Inc. Company #730		
EIN 20-4818866		
January 1, 2009 - December 31, 2009		
Memorial Contributions (Act.# 536015)	**Date**	
Children's Hospital Foundation - Philadelphia	01/05/2009	$100
CancerDare of Maine	01/12/2009	$50
American Lung Association	01/28/2009	$50
Blacksburg Rescue Squad	02/12/2009	$50
St. Camillus Church	02/19/2009	$100
Selwyn Ave Presbyterian Church	02/20/2009	$50
National Kidney Foundation	03/12/2009	$100
Central Vermont Home Health & Hospice	04/03/2009	$50
Foodshare	04/03/2009	$50
Central Vermont Home Health & Hospice	04/07/2009	$50
Richmond SPCA	04/07/2009	$50
St. Anne's Shrine	04/07/2009	$50
Kidney Foundation	04/21/2009	$100
Covenant Theological Seminary	04/22/2009	$100
Central Vermont Catholic School	05/06/2009	$50
Rutland Area Visiting Nurse and Hospice	05/15/2009	$50
Camp Ta Kum Ta	06/08/2009	$50
Impact Oasis	06/08/2009	$50
Middlesex Fire and Rescue	06/08/2009	$50
Green Mountain Glades Youth Hockey	09/29/2009	$100
Central Vermont Home Health & Hospice	10/26/2009	$50
TOTAL		**$1,350**
GRAND TOTAL FOR YEAR		**$336,950**