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

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

**2009**

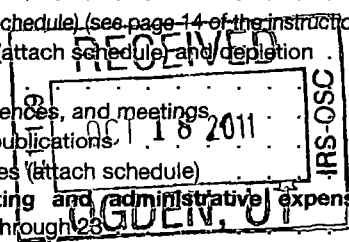
For calendar year **2009**, or tax year beginning , **2009**, and ending , **20**

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

<b>Use the IRS label. Otherwise, print or type. See Specific Instructions.</b>	Name of foundation <b>BLUE MOUNTAIN CENTER</b>		A Employer identification number <b>22-2370485</b>	
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite <b>P.O. Box 109</b>		B Telephone number (see page 10 of the instructions) <b>(518) 352-7300</b>	
	City or town, state, and ZIP code <b>BLUE MOUNTAIN LAKE, NY 12812-0109</b>		C If exemption application is pending, check here <input type="checkbox"/>	
H Check type of organization: <input type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis)</i>		D 1. Foreign organizations, check here . . . . . <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ <b>\$ 6,262,539</b>		E If private foundation status was terminated under section 507(b)(1)(A), check here . . . . . <input type="checkbox"/>		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here . . . . . <input type="checkbox"/>

<b>Part I Analysis of Revenue and Expenses</b> <i>(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).)</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	1 Contributions, gifts, grants, etc., received (attach schedule)	237,955			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	4,756	4,756	4,756	
	4 Dividends and interest from securities	91,781	91,781	91,781	
	5a Gross rents <b>Unrealized Gain</b>	878,249	-	-	
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	13,278			
	b Gross sales price for all assets on line 6a <b>1104,391</b>				
	7 Capital gain net income (from Part IV, line 2)		-		
	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)					
11 Other income (attach schedule)	7,073	-			
12 <b>Total.</b> Add lines 1 through 11	1,233,092	102,510	102,510		
<b>Operating and Administrative Expenses</b>	13 Compensation of officers, directors, trustees, etc.	89,193	8,919	8,919	80,274
	14 Other employee salaries and wages	123,850	12,385	12,385	111,465
	15 Pension plans, employee benefits	119,305	11,931	11,931	107,374
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	7,500	750	750	6,760
	c Other professional fees (attach schedule)	51,487	51,487	51,487	-
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	6,279	-	-	6,279
	19 Depreciation (attach schedule) and depletion	23,440	-	-	
	20 Occupancy	54,915	3,844	3,844	51,071
	21 Travel, conferences, and meetings	3,231	-	-	3,231
	22 Printing and publications				
	23 Other expenses (attach schedule)	129,018	645	645	128,373
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23	608,218	89,961	89,961	494,827
	25 Contributions, gifts, grants paid	50,294			50,294
26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	658,512	89,961	89,961	545,121	
27 Subtract line 26 from line 12:					
a <b>Excess of revenue over expenses and disbursements</b>	574,580				
b <b>Net investment income</b> (if negative, enter -0-)		12,549			
c <b>Adjusted net income</b> (if negative, enter -0-)			12,549		

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	704,224	819,729	819,729
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less: allowance for doubtful accounts ▶			
	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)	2300506	1633175	1633175
	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)	1999071	3142971	3142971	
14	Land, buildings, and equipment: basis ▶ <u>COST</u>				
	Less: accumulated depreciation (attach schedule) ▶ <u>SCHEDULE 2</u>	684,158	666,864	666,864	
15	Other assets (describe ▶)				
16	<b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	5687959	6262539	6262539	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	<b>Total liabilities</b> (add lines 17 through 22)	—	—	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input checked="" type="checkbox"/>				
	24	Unrestricted	5,408,814	6,001,473	
	25	Temporarily restricted	279,145	261,066	
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/>				
	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	<b>Total net assets or fund balances</b> (see page 17 of the instructions)	5,687,959	6,262,539		
31	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions)	5,687,959	6,262,539		

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 5687959
2	Enter amount from Part I, line 27a	2 574,580
3	Other increases not included in line 2 (itemize) ▶	3 —
4	Add lines 1, 2, and 3	4 6,262,539
5	Decreases not included in line 2 (itemize) ▶	5 —
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5)—Part II, column (b), line 30	6 6,262,539

**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		P	various	various
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			54,876	
b			(41,598)	
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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		
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	13,278	
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	13,278	

**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	592,706	5,003,801	
2007	639,825	8,707,736	.0734
2006	616,043	8,522,406	.0723
2005	592,261	8,337,076	.0710
2004	480,038	7,979,612	.0602
2	Total of line 1, column (d)	2	.3828
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	.0766
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	6,111,715
5	Multiply line 4 by line 3	5	468,157
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	125
7	Add lines 5 and 6	7	468,282
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 on page 18.	8	556,323

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

Table with 11 rows for excise tax calculations. Includes sub-sections 6a-6d for credits and payments. Values include 251, 8520, 8269, and 3269.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political influence, tax on political expenditures, and substantial contributors. Includes handwritten 'N/A' and 'NEW YORK'.

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 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? Website address www.bluemountaincenter.org 13 X
14 The books are in care of Harriet Barlow Telephone no. (518) 352-7391 Located at Blue Mountain Lake, NY ZIP+4 12812
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here. N/A 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.

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? No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 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)? 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.) 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)? N/A
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? 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? 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.) 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. 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? 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

BLUE MOUNTAIN CENTER

**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)? Organizations relying on a current notice regarding disaster assistance check here  N/A  No
- 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  N/A  
If "Yes," attach the statement required by Regulations section 53.4945-5(d).
- 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  Yes  No
- b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  Yes  No  
If "Yes" to 6b, file Form 8870.
- 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes  No
- b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  N/A

5b		X
6b		Y
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
HARRIET BARLOW BLUE MOUNTAIN LAKE, NY	40	89193	43521	-
ADAM HOCHSCHILD SAN FRANCISCO, CA	-	-	-	-
KIRK MARCKWALD SAN FRANCISCO, CA	-	-	-	-
ARLIE HOCHSCHILD SAN FRANCISCO, CA	-	-	-	-

**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 The Center provides space for promising young writers to develop their literary talents in a favorable environment & facilities for social change conferences	455053
2 Project to explore ways to raise visibility & importance of preservation of the commons	31995
3 Project to educate citizens about the importance of climate change legislation & project to teach young people journalism skills, photography skills & the importance of voting	11798
4	

**Part IX-B Summary of Program-Related Investments (see page 24 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 N/A	
2	
All other program-related investments. See page 24 of the instructions.	
3 NONE	
Total. Add lines 1 through 3	

**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	4775946
b	Average of monthly cash balances . . . . .	1b	761977
c	Fair market value of all other assets (see page 24 of the instructions) . . . . .	1c	666,864
d	<b>Total</b> (add lines 1a, b, and c) . . . . .	1d	6204787
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	6204787
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions) . . . . .	4	93072
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4 . . . . .	5	611715
6	<b>Minimum investment return.</b> Enter 5% of line 5 . . . . .	6	305586

**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	305586
2a	Tax on investment income for 2009 from Part VI, line 5 . . . . .	2a	251
b	Income tax for 2009. (This does not include the tax from Part VI.) . . . . .	2b	
c	Add lines 2a and 2b . . . . .	2c	251
3	Distributable amount before adjustments. Subtract line 2c from line 1 . . . . .	3	305335
4	Recoveries of amounts treated as qualifying distributions . . . . .	4	-
5	Add lines 3 and 4 . . . . .	5	305335
6	Deduction from distributable amount (see page 25 of the instructions) . . . . .	6	-
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 . . . . .	7	305,335

**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	545121
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	11202
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 . . . . .	4	556323
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	-
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4 . . . . .	6	556323

**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				305,335
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				
d From 2007				
e From 2008				
f Total of lines 3a through e				
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$ _____				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d Applied to 2009 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions				
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions				
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				
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				
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

**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				(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	12549	18956	98824	73462	203791
b 85% of line 2a . . . . .	10667	16113	84000	62443	173223
c Qualifying distributions from Part XII, line 4 for each year listed . . . . .	556323	596192	639825	592261	2384601
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 . . . . .	556323	596192	639825	592261	2384601
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets . . . . .	6262539	5687959	8857162	8784078	29591738
(2) Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . . . .	203724	238401	290403	277903	1010431
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .					
(3) Largest amount of support from an exempt organization . . . . .					
(4) Gross investment income . . . . .					

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

1 Information Regarding Foundation Managers:

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

NIA

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.

NIA

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

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

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

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
<p>a Paid during the year</p> <p>MARGOLIS AWARD Joe Wilkins</p>	NONE	N/A		5000
<b>Total</b> . . . . .				<b>3a</b>
<p>b Approved for future payment</p> <p>NONE</p>				
<b>Total</b> . . . . .				<b>3b</b>





**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

BLUE MOUNTAIN CENTER

Employer identification number

22: 2370485

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)( ) (enter number) organization

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

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

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

501(c)(3) taxable private foundation

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

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

**General Rule**

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

**Special Rules**

For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year . . . . . ▶ \$ .....

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

Name of organization **BLUE MOUNTAIN CENTER** Employer identification number **22-2370485**

**Part I** Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
	AKH FOUNDATION % ANCHIN, BLOCK, ANCHIN 1375 BROADWAY, NY, NY 10018	\$ 200,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$ .....	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$ .....	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$ .....	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$ .....	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$ .....	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

BLUE MOUNTAIN CENTER  
SCHEDULE 1  
12/31/09

22-2370485

Part 1 line 18

Taxes

Property & excise tax  
Income tax

\$ 2,580  
3,699  
\$ 6,279

Part 1 line 23

Other Expense

Food & beverages  
Repairs & maintenance  
Utilities  
Household supplies  
Materials & office supplies  
Insurance  
Telephone  
Other expense

\$-33,429  
23,624  
18,961  
23,526  
12,048  
13,039  
2,446  
1,945  
\$ 129,018

# SCHEDULE 2

22-2370485

## BLUE MOUNTAIN CENTER GENERAL DEPRECIATION December 31, 2009

Asset Description	Date Placed in Service	Cost	Method	Convention	Life	MACRS Class	Accumulated Depreciation 12/31/2008	Depreciation 2007	Accumulated Depreciation	Depreciation 2008	Accumulated Depreciation	Depreciation 2009	Accumulated Depreciation
Studio	12/31/1991	2,500	SL		31.5		1,027	79	1,108	79	1,185	79	1,264
Leasehold Improvements	7/1/1991	25,922	SL		31.5		12,777	823	13,600	823	14,423	823	15,246
Leasehold Improvements	11/1/1990	8,176	SL		31.5		4,182	260	4,452	260	4,712	260	4,972
Leasehold Improvements	7/1/1992	8,907	SL		31.5		4,116	283	4,399	283	4,682	283	4,965
Studio	7/1/1994	11,281	SL		20		11,281	-	11,281	-	11,281	-	11,281
Leasehold Improvements	7/1/1994	1,554	SL		20		1,554	-	1,554	-	1,554	-	1,554
Studio	11/1/1993	2,461	SL		31.5		1,137	78	1,215	78	1,293	78	1,371
Leasehold Improvements	9/1/1993	1,300	SL		31.5		545	41	586	41	627	41	668
Leasehold Improvements	5/1/1994	3,961	SL		31.5		1,542	126	1,668	126	1,794	126	1,920
Studio	4/1/1994	8,500	SL		31.5		3,327	270	3,597	270	3,867	270	4,137
Studio	5/1/1994	8,350	SL		31.5		2,874	265	3,139	265	3,404	265	3,669
Studio	9/1/1994	4,737	SL		31.5		1,628	150	1,778	150	1,928	150	2,078
Studio	8/1/1994	1,588	SL		31.5		548	50	598	50	648	50	698
Studio	9/1/1994	808	SL		31.5		282	28	308	28	334	28	360
Leasehold Improvements	6/15/1998	18,302	SL		31.5		6,149	581	6,730	581	7,311	581	7,892
Leasehold Improvements	6/1/1997	67,571	SL		31.5		20,556	2,145	22,701	2,145	24,846	2,145	26,991
Leasehold Improvements	7/1/1997	9,750	SL		31.5		2,945	310	3,255	310	3,565	310	3,875
Shower	4/1/2000	806	SL		31.5		125	19	144	19	163	19	182
Flooring	5/1/2000	1,369	SL		31.5		280	43	323	43	366	43	409
Flooring	12/1/2000	1,899	SL		31.5		362	60	422	60	482	60	542
Cabin	12/31/2000	1,622	SL		31.5		308	51	359	51	410	51	461
Leasehold Improvements	2/28/2001	12,565	SL		31.5		2,327	399	2,726	399	3,125	399	3,524
Leasehold Improvements	3/18/2001	13,773	SL		31.5		2,513	437	2,950	437	3,387	437	3,824
Leasehold Improvements	3/29/2001	27,332	SL		31.5		4,990	867	5,857	867	6,724	867	7,591
Leasehold Improvements	4/20/2001	25,166	SL		31.5		4,528	799	5,327	799	6,126	799	6,925
Leasehold Improvements	8/22/2001	1,009	SL		31.5		178	32	208	32	240	32	272
Leasehold Improvements	6/5/2001	223	SL		31.5		39	7	46	7	53	7	60
Leasehold Improvements	12/18/2001	1,414	SL		31.5		225	45	270	45	315	45	360
Town House	6/12/2001	77,800	SL		31.5		13,753	2,464	16,217	2,464	18,681	2,464	21,145
Leasehold Improvements	6/26/2001	1,647	SL		31.5		288	52	338	52	390	52	442
Leasehold Improvements	8/18/2001	6,068	SL		31.5		1,029	193	1,222	193	1,415	193	1,608
Flooring	10/1/1999	15,866	SL		31.5		4,032	504	4,536	504	5,040	504	5,544
Leasehold Improvements	7/1/2003	109,362	SL		31.5		11,483	3,472	14,955	3,472	18,407	3,472	21,879
Alarm System	6/30/2005	2,334	MSL	HY	5		701	467	1,168	467	1,635	467	2,102
Boller	11/17/2005	5,025	MSL	HY	10		503	503	1,006	503	1,509	503	2,012
Beds	7/1/2008	2,372	MACRS			5	237	474	711	474	1,185	474	1,659
Roof	10/1/2008	11,244	MACRS			31.5	178	357	535	357	892	357	1,249
Stable Roof	7/20/2007	4,750			31.5		151	151	151	151	302	151	453
Apt Renovation	8/17/2007	38,993			31.5		-	1,238	1,238	1,238	2,476	1,238	3,714
							109,123	-	109,123	-	-	-	-
Listed Property							-	-	-	-	-	-	-
Auto	5/25/2001	20,594	150DB	HY		5	16,235	1,775	18,010	2,584	20,594	-	20,594
							-	-	-	-	-	-	-
							-	-	-	-	-	-	-
							-	-	-	-	-	-	-
<b>Total Depreciable Assets</b>							<b>140,746</b>	<b>19,896</b>	<b>160,642</b>		<b>183,982</b>		
Land		283,000					-	-	-	-	-	-	-
							-	-	-	-	-	-	-
<b>Total Fixed Assets</b>													
Video Projector	8/28/2008	3,466	SL	HY	5		-	-	-	349	349	698	1,047
							-	-	-	-	-	-	-
							-	-	-	-	-	-	-
<b>Total</b>										<b>23,889</b>	<b>184,331</b>		
Volvo		12,436	SL	HY	5		-	-	-	-	-	1,244	1,244
Well-Dun		3,174	SL	HY	5		-	-	-	-	-	317	317
		870,575					-	-	-	-	-	20,380	204,711
Leasehold Improvements		1000					-	-	-	-	-	-	-
		871,575					-	-	-	-	-	-	-

SCHEDULE 3

22-2310485

**BLUE MOUNTAIN CENTER**  
Investment Income

	12/31/2009				12/31/2008				
	Rate of Return	Interest Income	Dividend Income	Realized Gains	Realized Losses	Unrealized Gains	Unrealized Losses	Total	Market Value
Savings		\$ 4,457	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,457	\$ 124,253
US Trust	16.2%	296	51,728	41,223	(19,496)	299,499	-	373,250	2,300,506
Vanguard	37.8%		39,914			389,709	-	429,623	1,272,346
Fidelity	23.0%		125			2,926	-	3,051	13,238
Sentinel	32.5%					171,693	-	171,693	527,514
Oak	9.7%	3	15	13,653	(22,102)	14,422	-	5,991	61,720
<b>Total</b>		<b>\$ 4,756</b>	<b>\$ 91,781</b>	<b>\$ 54,876</b>	<b>\$ (41,598)</b>	<b>\$ 878,249</b>	<b>\$ -</b>	<b>\$ 988,064</b>	<b>\$ 4,299,577</b>

22-2370485

SCHEDULE 4  
**BLUE MOUNTAIN CENTER**  
 Investments  
 12/31/2009

	US Trust	Vanguard	Sentinel (Citizens)	Fidelity	Oak Fund	Totals
<b>Cost</b>						
Money Market Funds	\$ 660,264	\$ -	\$ -	\$ -	\$ -	\$ 660,264
Mutual Funds	-	1,540,202	963,569	30,681	-	2,534,452
Corporate Stocks	1,421,689	-	-	-	-	1,421,689
Partnership investment	-	-	-	-	95,679	95,679
<b>Total</b>	<b>\$ 2,081,953</b>	<b>\$ 1,540,202</b>	<b>\$ 963,569</b>	<b>\$ 30,681</b>	<b>\$ 95,679</b>	<b>\$ 4,712,084</b>
<b>Market</b>						
Money Market	\$ 660,264	\$ -	\$ -	\$ -	\$ -	\$ 660,264
Mutual Funds	-	1,701,939	699,206	16,290	-	2,417,435
Corporate Stocks	1,633,175	-	-	-	-	1,633,175
Partnership Investment	-	-	-	-	65,072	65,072
<b>Total</b>	<b>\$ 2,293,439</b>	<b>\$ 1,701,939</b>	<b>\$ 699,206</b>	<b>\$ 16,290</b>	<b>\$ 65,072</b>	<b>\$ 4,775,946</b>



U.S. TRUST

Bank of America Private Wealth Management

BLUE MOUNTAIN CENTER

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22-2370485  
2009 Tax Information Letter

Account Number 011005860356

SCHEDULE 5

**1099-B Proceeds From Broker Transactions (OMB No. 1545-0715)**

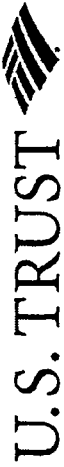
This section reports your proceeds from each of your sales during the year which are reported to the Internal Revenue Service. The proceeds from each of your sales are reported to the IRS on Forms 1099-B (Box 2), not the aggregate total of your sales. You must report the proceeds of each sale on your tax return. We must report all transactions on a trade-date basis which is the date shown in the sale date column (Box 1a). The proceeds reported in Box 2 are less commissions, transfer charges, and premiums.

We are not required to nor do we report gains or losses on these sales to the IRS. We have adjusted tax costs for amortization of premium paid for the acquisition of municipal bonds through date of sale and for non-taxable dividends. Wash sales are reported with tax cost equal to proceeds. Disallowed losses from wash sales have been added to the tax cost of the repurchased securities. An asterisk symbol (\*) next to the tax cost indicates that the tax cost has been adjusted for the current year's return of capital. However, we have not made adjustments to the cost basis of all partnerships.

**Short term transactions**

This category includes all assets held 12 months or less.

Description (Box 7)	Cusip (Box 1b)	Number of shares exchanged (Box 5)	Acquisition Date	Sale date (Box 1a)	Gross proceeds less commissions (Box 2)	Tax cost	Net gain or loss
3M CO	88579Y101	100	07/15/08	02/05/09	\$5,133.97	\$6,770.14	\$-1,636.17
SCHLUMBERGER LTD	806857108	100	09/29/08	02/05/09	\$4,362.97	\$4,362.97	\$0.00
AVON PRODUCTS INC	054303102	100	07/15/08	02/05/09	\$2,125.98	\$3,486.16	\$-1,360.18
SCHLUMBERGER LTD	806857108	100	09/29/08	05/14/09	\$5,376.86	\$7,508.21	\$-2,131.35
AVON PRODUCTS INC	054303102	100	07/15/08	05/14/09	\$2,264.94	\$3,486.16	\$-1,221.22
STATE STR CORP	857477103	200	05/18/09	05/21/09	\$8,593.01	\$7,800.00	\$793.01
SCHLUMBERGER LTD	806857108	100	09/29/08	07/09/09	\$5,082.86	\$7,508.21	\$-2,425.35
3M CO	88579Y101	100	07/15/08	07/09/09	\$5,917.84	\$6,770.14	\$-852.30
AVON PRODUCTS INC	054303102	100	07/16/08	07/09/09	\$2,543.93	\$3,583.10	\$-1,039.17
3M CO	88579Y101	200	08/07/08	07/17/09	\$12,555.67	\$14,275.48	\$-1,719.81
AVON PRODUCTS INC	054303102	200	07/17/08	07/17/09	\$5,537.85	\$7,227.18	\$-1,689.33
CONOCOPHILLIPS	20825C104	200	06/12/09	07/17/09	\$8,477.78	\$8,477.78	\$0.00
AVON PRODUCTS INC	054303102	100	07/18/08	07/17/09	\$2,768.93	\$3,604.93	\$-836.00
SCHLUMBERGER LTD	806857108	300	09/29/08	07/17/09	\$16,703.57	\$22,524.63	\$-5,821.06
STRYKER CORP	863667101	100	08/13/09	09/28/09	\$4,595.22	\$4,019.55	\$575.67
CONOCOPHILLIPS	20825C104	100	05/18/09	09/28/09	\$4,564.41	\$4,284.63	\$279.78



Bank of America Private Wealth Management

BLUE MOUNTAIN CENTER

**Short term transactions**

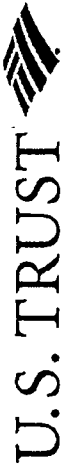
This category includes all assets held 12 months or less.

Description (Box 7)	Cusip (Box 1b)	Number of shares exchanged (Box 5)	Acquisition Date	Sale date (Box 1a)	Gross proceeds less commissions (Box 2)	Tax cost	Net gain or loss
SCHLUMBERGER LTD	806857108	100	10/02/08	09/28/09	\$6,027.01	\$7,183.88	\$-1,156.87
CONOCOPHILLIPS	20825C104	100	05/18/09	12/21/09	\$5,028.87	\$4,284.63	\$744.24
Total short term gain/loss from sales: Report on Form 1040, Schedule D, line 1, Column d, e and f							
					\$107,661.67	\$127,157.78	\$-19,496.11

**Long term transactions**

This category includes all assets held more than 12 months.

Description (Box 7)	Cusip (Box 1b)	Number of shares exchanged (Box 5)	Acquisition Date	Sale date (Box 1a)	Gross proceeds less commissions (Box 2)	Tax cost	Net gain or loss
WELLS FARGO & CO (NEW)	949746101	800	10/12/98	01/28/09	\$16,326.38	\$12,600.00	\$3,726.38
AUTOMATIC DATA PROCESSING INC	053015103	300	10/09/02	02/05/09	\$11,447.93	\$9,420.61	\$2,027.32
MICROSOFT CORP	594918104	300	02/02/05	02/05/09	\$5,669.96	\$7,924.32	\$-2,254.36
PEPSICO INC	713448108	200	05/11/99	02/05/09	\$10,379.94	\$6,886.88	\$3,493.06
PROCTER & GAMBLE CO	742718109	200	10/28/04	02/05/09	\$10,629.94	\$10,178.52	\$451.42
INTERNATIONAL BUSINESS MACHINES	459200101	100	10/09/02	02/05/09	\$9,221.94	\$5,558.62	\$3,663.32
WELLS FARGO & CO (NEW)	949746101	200	10/12/98	02/05/09	\$3,311.98	\$3,150.00	\$161.98
JOHNSON AND JOHNSON	478160104	200	09/19/03	02/05/09	\$11,655.93	\$10,072.94	\$1,582.99
LOWES COMPANIES INC	548661107	300	01/02/08	02/05/09	\$5,640.95	\$6,695.85	\$-1,054.90
DISNEY WALT CO	254687106	200	01/13/98	02/05/09	\$3,791.97	\$6,175.02	\$-2,383.05
COCA COLA	191216100	200	11/12/04	02/05/09	\$8,520.95	\$8,066.42	\$454.53
GENERAL ELECTRIC CO	369604103	300	09/12/02	02/05/09	\$3,314.98	\$8,419.17	\$-5,104.19
GOLDMAN SACHS GROUP INC	38141G104	100	06/20/01	02/05/09	\$9,222.94	\$8,719.00	\$503.94
BERKSHIRE HATHAWAY INC DEL CL B	084670207	2	04/20/06	02/05/09	\$5,869.88	\$5,737.33	\$132.55
GENERAL ELECTRIC CO	369604103	1000	09/12/02	03/06/09	\$7,108.25	\$28,063.90	\$-20,955.65
WELLS FARGO & CO (NEW)	949746101	600	01/14/99	03/18/09	\$9,414.78	\$10,723.23	\$-1,308.45



Bank of America Private Wealth Management

BLUE MOUNTAIN CENTER

2009 Tax Information Letter

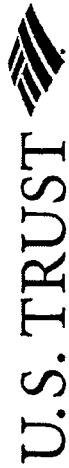
Account Number 011005860356

Page 3

Long term transactions

This category includes all assets held more than 12 months.

Description (Box 7)	Cusip (Box 1b)	Number of shares exchanged (Box 5)	Acquisition Date	Sale date (Box 1a)	Gross proceeds less commissions (Box 2)	Tax cost	Net gain or loss
WELLS FARGO & CO (NEW)	949746101	400	01/27/99	04/09/09	\$7,591 80	\$7,010 00	\$581 80
INTERNATIONAL BUSINESS MACHINES	459200101	200	10/09/02	05/14/09	\$20,309.47	\$11,117 24	\$9,192 23
JOHNSON AND JOHNSON	478160104	200	09/19/03	05/14/09	\$11,003 71	\$10,072 94	\$930 77
MICROSOFT CORP	594918104	400	02/02/05	05/14/09	\$7,979 79	\$10,565 76	\$-2,585 97
PEPSICO INC	713448108	100	05/11/99	05/14/09	\$5,046 87	\$3,443 44	\$1,603 43
PEPSICO INC	713448108	100	05/27/99	05/14/09	\$5,046 87	\$3,604 33	\$1,442 54
PROCTER & GAMBLE CO	742718109	200	10/28/04	05/14/09	\$10,197 73	\$10,178 52	\$19 21
WELLS FARGO & CO (NEW)	949746101	200	01/27/99	05/14/09	\$5,061 86	\$3,505 00	\$1,556.86
GENERAL ELECTRIC CO	369604103	200	09/12/02	05/14/09	\$2,601 93	\$5,612.78	\$-3,010 85
GENERAL ELECTRIC CO	369604103	100	10/29/02	05/14/09	\$1,300.96	\$2,571 50	\$-1,270 54
AUTOMATIC DATA PROCESSING INC	053015103	300	10/09/02	05/14/09	\$10,958 71	\$9,420 60	\$1,538 11
<b>C</b> BERKSHIRE HATHAWAY INC DEL CL B	084670207	2	04/25/06	05/14/09	\$5,779 77	\$5,749 16	\$30 61
COCA COLA	191216100	100	11/12/04	05/14/09	\$4,440 89	\$4,033 21	\$407 68
COCA COLA	191216100	100	12/17/04	05/14/09	\$4,440 88	\$4,109 44	\$331 44
DISNEY WALT CO	254687106	300	01/13/98	05/14/09	\$7,097 81	\$9,262 53	\$-2,164 72
MICROSOFT CORP	594918104	500	02/02/05	07/09/09	\$11,244 71	\$13,207 20	\$-1,962 49
GENERAL ELECTRIC CO	369604103	400	10/29/02	07/09/09	\$4,347 88	\$10,286.00	\$-5,938 12
INTERNATIONAL BUSINESS MACHINES	459200101	100	10/29/02	07/09/09	\$10,201 73	\$7,495.38	\$2,706 35
JOHNSON AND JOHNSON	478160104	100	02/19/04	07/09/09	\$5,645 85	\$5,371.53	\$274 32
COCA COLA	191216100	300	12/17/04	07/09/09	\$14,594 62	\$12,328 32	\$2,266 30
PROCTER & GAMBLE CO	742718109	200	10/28/04	07/09/09	\$10,483.73	\$10,178.52	\$305 21
JOHNSON AND JOHNSON	478160104	100	09/23/03	07/09/09	\$5,645 86	\$5,004 57	\$641 29
<b>C</b> BERKSHIRE HATHAWAY INC DEL CL B	084670207	2	04/25/06	07/09/09	\$5,551 75	\$5,749 17	\$-197 42
PEPSICO INC	713448108	100	05/27/99	07/09/09	\$5,458 85	\$3,604 33	\$1,854 52
JOHNSON AND JOHNSON	478160104	100	09/19/03	07/09/09	\$5,645 85	\$5,036 47	\$609 38



Bank of America Private Wealth Management

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2009 Tax Information Letter

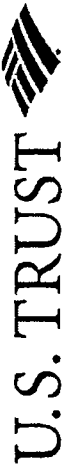
Account Number 011005860356

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Long term transactions

This category includes all assets held more than 12 months.

Description (Box 7)	Cusip (Box 1b)	Number of shares exchanged (Box 5)	Acquisition Date	Sale date (Box 1a)	Gross proceeds less commissions (Box 2)	Tax cost	Net gain or loss
DISNEY WALT CO	254687106	400	01/13/98	07/09/09	\$8,955.76	\$12,350.04	\$-3,394.28
LOWES COMPANIES INC	548661107	200	01/03/08	07/09/09	\$3,781.90	\$3,781.90	\$0.00
AUTOMATIC DATA PROCESSING INC	053015103	200	11/05/02	07/09/09	\$6,733.82	\$7,554.08	\$-820.26
AUTOMATIC DATA PROCESSING INC	053015103	200	10/29/02	07/09/09	\$6,733.83	\$7,441.85	\$-708.02
LOWES COMPANIES INC	548661107	200	01/03/08	07/09/09	\$3,781.90	\$4,400.82	\$-618.92
GOLDMAN SACHS GROUP INC	38141G104	100	09/27/04	07/09/09	\$14,447.62	\$9,269.27	\$5,178.35
LOWES COMPANIES INC	548661107	100	01/02/08	07/09/09	\$1,890.95	\$1,890.95	\$0.00
WELLS FARGO & CO (NEW)	949746101	300	05/27/99	07/09/09	\$7,028.81	\$5,906.49	\$1,122.32
GOLDMAN SACHS GROUP INC	38141G104	100	09/27/04	07/17/09	\$15,648.59	\$9,269.27	\$6,379.32
AUTOMATIC DATA PROCESSING INC	053015103	100	11/05/02	07/17/09	\$3,510.91	\$3,777.04	\$-266.13
AUTOMATIC DATA PROCESSING INC	053015103	500	09/25/03	07/17/09	\$17,554.54	\$16,620.14	\$934.40
AUTOMATIC DATA PROCESSING INC	053015103	300	09/29/03	07/17/09	\$10,532.73	\$9,796.45	\$736.28
AVON PRODUCTS INC	054303102	100	07/16/08	07/17/09	\$2,768.93	\$3,583.10	\$-814.17
C BERKSHIRE HATHAWAY INC DEL CL B	084670207	2	04/25/06	07/17/09	\$5,869.97	\$5,749.16	\$120.81
C BERKSHIRE HATHAWAY INC DEL CL B	084670207	3	04/27/06	07/17/09	\$8,804.95	\$8,765.09	\$39.86
COCA COLA	191216100	300	12/17/04	07/17/09	\$15,044.61	\$12,328.32	\$2,716.29
COCA COLA	191216100	100	02/02/05	07/17/09	\$5,014.87	\$4,162.83	\$852.04
COCA COLA	191216100	200	02/03/05	07/17/09	\$10,029.74	\$8,355.66	\$1,674.08
COCA COLA	191216100	100	02/23/05	07/17/09	\$5,014.87	\$4,254.90	\$759.97
GENERAL ELECTRIC CO	369604103	800	10/29/02	07/17/09	\$9,223.76	\$20,572.00	\$-11,348.24
WELLS FARGO & CO (NEW)	949746101	700	05/27/99	07/17/09	\$17,226.55	\$13,781.81	\$3,444.74
3M CO	88579Y101	100	07/15/08	07/17/09	\$6,277.84	\$6,770.14	\$-492.30
PROCTER & GAMBLE CO	742718109	600	11/02/04	07/17/09	\$33,305.14	\$30,588.60	\$2,716.54
PEPSICO INC	713448108	500	09/01/99	07/17/09	\$28,474.26	\$16,838.80	\$11,635.46
MICROSOFT CORP	594918104	100	02/22/05	07/17/09	\$2,410.94	\$2,528.43	\$-117.49



U.S. TRUST

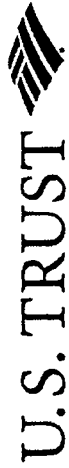
Bank of America Private Wealth Management

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Long term transactions

This category includes all assets held more than 12 months.

Description (Box 7)	Cusip (Box 1b)	Number of shares exchanged (Box 5)	Acquisition Date	Sale date (Box 1a)	Gross proceeds less commissions (Box 2)	Tax cost	Net gain or loss
MICROSOFT CORP	594918104	100	02/18/05	07/17/09	\$2,410.94	\$2,550.00	\$-139.06
MICROSOFT CORP	594918104	400	02/17/05	07/17/09	\$9,643.75	\$10,277.84	\$-634.09
MICROSOFT CORP	594918104	300	02/03/05	07/17/09	\$7,232.81	\$7,871.82	\$-639.01
MICROSOFT CORP	594918104	200	02/02/05	07/17/09	\$4,821.87	\$5,282.88	\$-461.01
LOWES COMPANIES INC	548661107	600	02/28/08	07/17/09	\$12,221.68	\$14,886.78	\$-2,665.10
LOWES COMPANIES INC	548661107	100	01/08/08	07/17/09	\$2,036.95	\$2,061.32	\$-24.37
LOWES COMPANIES INC	548661107	200	01/03/08	07/17/09	\$4,073.90	\$4,400.82	\$-326.92
LOWES COMPANIES INC	548661107	200	12/13/07	07/17/09	\$4,073.89	\$4,341.19	\$-267.30
LOWES COMPANIES INC	548661107	100	12/12/07	07/17/09	\$2,036.95	\$2,202.12	\$-165.17
JOHNSON AND JOHNSON	478160104	600	02/19/04	07/17/09	\$35,441.08	\$32,229.18	\$3,211.90
INTERNATIONAL BUSINESS MACHINES	459200101	200	09/14/04	07/17/09	\$22,828.41	\$17,338.66	\$5,489.75
DISNEY WALT CO	254687106	62	02/01/00	07/17/09	\$1,514.00	\$2,228.58	\$-714.58
INTERNATIONAL BUSINESS MACHINES	459200101	200	10/29/02	07/17/09	\$22,828.41	\$14,990.76	\$7,837.65
DISNEY WALT CO	254687106	938	01/13/98	07/17/09	\$22,905.37	\$28,960.84	\$-6,055.47
INTERNATIONAL BUSINESS MACHINES	459200101	100	09/14/04	07/20/09	\$11,635.22	\$8,669.33	\$2,965.89
WELLS FARGO & CO (NEW)	949746101	200	12/13/99	08/05/09	\$5,596.39	\$4,411.00	\$1,185.39
GENERAL ELECTRIC CO	369604103	500	10/29/02	08/05/09	\$6,981.37	\$12,857.50	\$-5,876.13
GENERAL ELECTRIC CO	369604103	100	10/29/02	08/06/09	\$1,435.96	\$2,571.50	\$-1,135.54
WELLS FARGO & CO (NEW)	949746101	200	01/04/00	08/07/09	\$5,816.01	\$3,689.75	\$2,126.26
GENERAL ELECTRIC CO	369604103	200	10/29/02	09/15/09	\$3,186.46	\$5,143.00	\$-1,956.54
GENERAL ELECTRIC CO	369604103	100	10/29/02	09/16/09	\$1,684.04	\$2,571.50	\$-887.46
LOWES COMPANIES INC	548661107	100	02/28/08	09/28/09	\$2,127.95	\$2,481.13	\$-353.18
LOWES COMPANIES INC	548661107	200	02/29/08	09/28/09	\$4,255.89	\$4,842.90	\$-587.01
MICROSOFT CORP	594918104	300	02/22/05	09/28/09	\$7,779.55	\$7,585.29	\$194.26
PEPSICO INC	713448108	100	09/01/99	09/28/09	\$5,919.01	\$3,367.76	\$2,551.25



Bank of America Private Wealth Management

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2009 Tax Information Letter

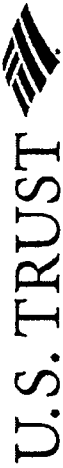
Account Number 011005860356

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Long term transactions

This category includes all assets held more than 12 months.

Description (Box 7)	Cusip (Box 1b)	Number of shares exchanged (Box 5)	Acquisition Date	Sale date (Box 1a)	Gross proceeds less commissions (Box 2)	Tax cost	Net gain or loss
PROCTER & GAMBLE CO	742718109	200	11/02/04	09/28/09	\$11,688 74	\$10,196 20	\$1,492 54
3M CO	88579Y101	100	08/07/08	09/28/09	\$7,452 23	\$7,137 74	\$314 49
WELLS FARGO & CO (NEW)	949746101	200	01/04/00	09/28/09	\$5,650.11	\$3,689 75	\$1,960 36
GENERAL ELECTRIC CO	369604103	100	10/29/02	09/28/09	\$1,669 97	\$2,571 50	\$-901 53
GENERAL ELECTRIC CO	369604103	100	11/17/03	09/28/09	\$1,669 96	\$2,752 92	\$-1,082 96
AUTOMATIC DATA PROCESSING INC	053015103	200	09/29/03	09/28/09	\$7,941 33	\$6,530 97	\$1,410 36
AUTOMATIC DATA PROCESSING INC	053015103	100	11/18/03	09/28/09	\$3,970 67	\$3,404 92	\$565 75
AVON PRODUCTS INC	054303102	100	07/21/08	09/28/09	\$3,335 17	\$3,577 71	\$-242 54
C BERKSHIRE HATHAWAY INC DEL CL B	084670207	1	05/03/06	09/28/09	\$3,281.39	\$2,951 97	\$329 42
COCA COLA	191216100	100	02/23/05	09/28/09	\$5,330 20	\$4,254.90	\$1,075 30
COCA COLA	191216100	100	02/28/05	09/28/09	\$5,330 19	\$4,289.44	\$1,040 75
DISNEY WALT CO	254687106	300	02/01/00	09/28/09	\$8,436 02	\$10,783 47	\$-2,347 45
INTERNATIONAL BUSINESS MACHINES	459200101	100	09/14/04	09/28/09	\$12,175 11	\$8,669 33	\$3,505 78
JOHNSON AND JOHNSON	478160104	200	02/19/04	09/28/09	\$12,243.27	\$10,743.06	\$1,500.21
DISNEY WALT CO	254687106	100	02/01/00	11/13/09	\$3,042 80	\$3,594 49	\$-551 69
INTERNATIONAL BUSINESS MACHINES	459200101	100	09/14/04	12/21/09	\$12,868 66	\$8,669.33	\$4,199 33
DISNEY WALT CO	254687106	238	02/01/00	12/21/09	\$7,701 48	\$8,554 88	\$-853 40
LOWES COMPANIES INC	548661107	200	02/29/08	12/21/09	\$4,761.87	\$4,842 90	\$-81 03
MICROSOFT CORP	594918104	100	02/22/05	12/21/09	\$3,054.92	\$2,528 43	\$526 49
MICROSOFT CORP	594918104	200	02/28/05	12/21/09	\$6,109.84	\$5,043 66	\$1,066 18
PEPSICO INC	713448108	200	09/01/99	12/21/09	\$12,021 75	\$6,735 52	\$5,286 23
PROCTER & GAMBLE CO	742718109	100	11/02/04	12/21/09	\$6,146 39	\$5,098 10	\$1,048 29
SCHLUMBERGER LTD	806857108	100	10/06/08	12/21/09	\$6,444 83	\$6,475 30	\$-30 47
3M CO	88579Y101	100	08/07/08	12/21/09	\$8,171 58	\$7,137.74	\$1,033 84
WELLS FARGO & CO (NEW)	949746101	200	02/01/00	12/21/09	\$5,481 85	\$4,050.69	\$1,431.16



Long term transactions

This category includes all assets held more than 12 months.

Description (Box 7)	Cusip (Box 1b)	Number of shares exchanged (Box 5)	Acquisition Date	Sale date (Box 1a)	Gross proceeds less commissions (Box 2)	Tax cost	Net gain or loss
DISNEY WALT CO	254687106	62	09/29/04	12/21/09	\$2,006 27	\$1,350 61	\$655 66
GENERAL ELECTRIC CO	369604103	200	11/17/03	12/21/09	\$3,135 91	\$5,505 84	\$-2,369 93
AUTOMATIC DATA PROCESSING INC	053015103	200	11/18/03	12/21/09	\$8,541 70	\$6,809 84	\$1,731 86
AVON PRODUCTS INC	054303102	200	07/25/08	12/21/09	\$6,381 83	\$7,292 40	\$-910 57
<input type="checkbox"/> BERKSHIRE HATHAWAY INC DEL CL B	084670207	1	05/03/06	12/21/09	\$3,301 08	\$2,951 97	\$349 11
<input type="checkbox"/> BERKSHIRE HATHAWAY INC DEL CL B	084670207	1	05/04/06	12/21/09	\$3,301 07	\$2,928 79	\$372 28
COCA COLA	191216100	200	02/28/05	12/21/09	\$11,423 70	\$8,578 88	\$2,844 82
JOHNSON AND JOHNSON	478160104	200	02/19/04	12/21/09	\$12,893 66	\$10,743 06	\$2,150 60
Total long term gain/loss from sales:					\$996,729 78	\$955,506 65	\$41,223 13
Total proceeds reported to IRS on Form 1099-B					\$1,104,391.45		

Report on Form 1040, Schedule D, line 8, Column d, e, and f