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Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation**2009**

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

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

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation DAVID J. FELDMAN AND SYDNEY E. FELDMAN CHARITABLE TRUST		A Employer identification number 22-2378773
	Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions) 781-329-0319
	City or town, state, and ZIP code DEDHAM MA 02026		C If exemption application is pending, check here <input type="checkbox"/>
			D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 435,115			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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)	119,150			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	31	31		
	4 Dividends and interest from securities	9,704	9,704		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	0			
	b Gross sales price for all assets on line 6a 44,432				
	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)	0				
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	128,885	9,735	0		
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)	1,825	1,825		
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	370	370		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	94	94		
	24 Total operating and administrative expenses. Add lines 13 through 23	2,289	2,289	0	0
	25 Contributions, gifts, grants paid	53,416			53,416
26 Total expenses and disbursements. Add lines 24 and 25	55,705	2,289	0	53,416	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	73,180				
b Net investment income (if negative, enter -0-)		7,446			
c Adjusted net income (if negative, enter -0-)			0		

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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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	10,919	18,089	18,089
	2 Savings and temporary cash investments	6,959	3,540	3,540
	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)	353,425	355,015	413,486
	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 ▶)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	371,303	376,644	435,115	
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 Total liabilities (add lines 17 through 22)	0	0		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	371,303	376,644	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see page 17 of the instructions)	371,303	376,644	
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	371,303	376,644		

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	371,303
2 Enter amount from Part I, line 27a	2	73,180
3 Other increases not included in line 2 (itemize) ▶ See attached Schedule	3	356
4 Add lines 1, 2, and 3	4	444,839
5 Decreases not included in line 2 (itemize) ▶ See attached Schedule	5	68,195
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	376,644

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 Sales - see attached Schedule					
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 44,432		88,748	(44,316)		
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					
(i) FMV 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	0	
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.

(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	44,478	415,184	0.1071
2007	32,090	482,700	0.0665
2006	41,422	446,548	0.0928
2005	34,966	396,227	0.0882
2004	30,339	379,746	0.0799
2 Total of line 1, column (d)			2 0.4345
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 0.0869
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 312,993
5 Multiply line 4 by line 3			5 27,199
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 75
7 Add lines 5 and 6			7 27,274
8 Enter qualifying distributions from Part XII, line 4			8 53,416

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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	74
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3 Add lines 1 and 2	3	74
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	74
6 Credits/Payments		
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	688
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	688
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	614
11 Enter the amount of line 10 to be Credited to 2010 estimated tax 614 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?		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)? <i>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</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (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? <i>If "Yes," attach a detailed description of the activities.</i>		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? <i>If "Yes," attach a conformed copy of the changes</i>		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ Massachusetts.....		
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? <i>If "No," attach explanation</i>	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)? <i>If "Yes," complete Part XIV</i>		x
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		x

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?	13	X	

Website address ▶ _____

14 The books are in care of ▶ David J. Feldman Telephone no ▶ 781-329-0319
 Located at ▶ 47 Village Avenue, Unit 207, Dedham, MA ZIP+4 ▶ 02026

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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	1b	N/A
Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>		
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	2b	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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))?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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).		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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				5b N/A
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?		<input type="checkbox"/> Yes	<input type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870				6b X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?				7b N/A

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
David J. Feldman 47 Village Avenue, Unit 207, Dedham, MA 02026	Trustee	0	0	0
Sydney E. Feldman 47 Village Avenue, Unit 207, Dedham, MA 02026	Trustee	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

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

 Total number of other employees paid over \$50,000 0

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
N O N E		

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 N O N E	
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 N O N E	
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	294,431
b	Average of monthly cash balances	1b	23,328
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	317,759
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	317,759
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see page 25 of the instructions)	4	4,766
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	312,993
6	Minimum investment return. Enter 5% of line 5	6	15,650

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	15,650
2a	Tax on investment income for 2009 from Part VI, line 5	2a	75
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	75
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	15,575
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	15,575
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	15,575

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	53,416
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	53,416
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	74
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	53,342

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				15,575
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	11,914			
b From 2005	15,641			
c From 2006	20,511			
d From 2007	8,868			
e From 2008	23,946			
f Total of lines 3a through e	80,880			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 53,416				
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				15,575
e Remaining amount distributed out of corpus	37,841			
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	118,721			
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				
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)	11,914			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	106,807			
10 Analysis of line 9:				
a Excess from 2005	15,641			
b Excess from 2006	20,511			
c Excess from 2007	8,868			
d Excess from 2008	23,946			
e Excess from 2009	37,841			

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 N / A

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					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 $\frac{1}{2}$ 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))

David J. Feldman and Sydney E. Feldman

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

N O N E

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

David J. and Sydney E. Feldman, 47 Village Avenue, Unit 207, Dedham, MA 02026 781-329-0319

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

No specific forms or enclosures required

- c** Any submission deadlines

N O N E

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

N O N E

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)				
a <i>Paid during the year</i> See attached Schedule				53,416
Total			▶ 3a	53,416
b <i>Approved for future payment</i> N O N E				
Total			▶ 3b	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

N / A

		Business 2005	Partnership	Individual 2005	Partnership	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					
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					
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		0	0
13	Total. Add line 12, columns (b), (d), and (e)					

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

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

[illegible]

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 | | X |
| | (2) Other assets | | X |
| b | Other transactions. | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | 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 | | |

[illegible]

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

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



(a) Name of organization	(b) Type of organization	(c) Description of relationship
N / A		

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 David J. Feldman, Trustee Date 5-5-10

► Trustee
Title

Sign Here

Paid Preparer's Use Only	Preparer's signature 	Date 5.3.10	Check if self-employed <input checked="" type="checkbox"/>	Preparer's identifying number (see Signature on page 30 of the instructions) 485-56-8040
	Firm's name (or yours if self-employed), address, and ZIP code Gregory J. England, Esq 101 Federal Street, 3rd Floor, Boston, MA 02110	EIN  04-3280048 Phone no 617-439-6779		

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

DAVID J. FELDMAN AND SYDNEY E. FELDMAN CHARITABLE TRUST

22-2378773

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 33½% 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

DAVID J FELDMAN AND SYDNEY E FELDMAN CHARITABLE TRUST

Employer identification number

22-2378773

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	David J. Feldman 47 Village Avenue, Unit 207 Dedham, MA 02026	\$ 119,150	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization

DAVID J FELDMAN AND SYDNEY E FELDMAN CHARITABLE TRUST

Employer identification number

22-2378773

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	523,286 Shs Euro Pacific Growth Fund, Class A	\$ 19,869	09/18/2009
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	638 Shs Euro Pacific Growth Fund, Class A	\$ 24,225	10/16/2009
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	932 835 Shs Capital Income Builder Fund, Class A	\$ 45,056	12/11/2009
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

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Last statement November 30 2009

This statement December 31 2009

703-MO-4 L-5012-10181

DAVID J. FELDMAN AND

SYDNEY E. FELDMAN CHARITABLE TRUST

47 VILLAGE AVE # 207

DEDHAM MA 02026-4232

Page 1

0525035747

(4)

Direct inquiries to

Dedham Savings

P.O. Box 9107

Dedham MA 02027-9107

THE 18165 LAW STATES, "NO BANK SHALL IMPOSE ANY FEE, CHARGE OR ASSESSMENT AGAINST CERTAIN SAVINGS CHECKING ACCOUNTS OF PERSONS 65 YRS OF AGE OR OLDER OR 18 YRS OR YOUNGER". STOP BY ANY OFFICE TO COMPLETE AN 18165 COUPON. HAPPY HOLIDAYS FROM DEDHAM SAVINGS!

Check Plus Account

Account number 0525035747

Enclosures 4

Interest paid year to date \$31.45

DAILY ACTIVITY

Date	Description	Additions	Subtractions	Balance
11-30	Beginning balance			\$3,018.23
12-07	Check 754		100.00	2,918.23
12-10	Deposit	3,720.00		6,638.23
	TLR-101-BR-01			
12-15	Check 753		100.00	6,538.23
12-29	Check 756		1,000.00	5,538.23
12-29	Check 755		2,000.00	3,538.23
12-31	Interest	1.93		3,540.16
12-31	Ending totals	3,721.93	3,200.00	\$3,540.16

INTEREST INFORMATION

Annual percentage yield earned	0.44%
Interest-bearing days	31
Average balance for APY	\$5,232.42
Interest earned	\$1.93

DIVIDENDS AND DISTRIBUTIONS

(Details of Form 1099-DIV)

Description	Date Paid	Total Ordinary Dividends (Box 1a)	Qualified Dividends (Box 1b)	Total Capital Gain Distributions (Box 2a)	Nondividend Distributions (Box 3)	Federal Income Tax Withheld (Box 4)	Investment Expenses (Box 5)	Foreign Tax Paid (Box 6)
ALLIANZ NF	03/23/2009	128.94	128.94					
DIVIDEND VALUE FUND CLASS C	06/22/2009	96.52	96.52					
	09/21/2009	63.53	63.53					
		288.99	288.99					
CAPITAL INCOME BUILDER FUND CLASS A	03/24/2009	971.51	669.08					
	06/23/2009	1,005.36	892.39					
	09/29/2009	1,016.21	699.86					
	12/22/2009	165.03						
	12/22/2009	815.20	365.11					
	12/22/2009	995.76	995.76					
		4,969.07	3,422.20					
CAPITAL WORLD GROWTH & INCOME FUND CLASS A	03/24/2009	257.18	257.18					34.06
	06/23/2009	632.95	632.95					34.13
	09/29/2009	262.42	262.42					34.62
	12/18/2009	137.50	137.50					15.45
	12/18/2009	171.89	171.89					19.32
		1,461.94	1,461.94					137.58

TEEDA DIVI

DBAB CASH RESERVE PRIME SERIES FOR TAX YEAR 2009	18.09							
EUROPACIFIC GROWTH FUND CLASS A	12/29/2009	824.51	824.51					102.19
FOREIGN 00 84 34800								
THE INCOME FUND OF AMERICA CLASS A	03/24/2009	292.45	179.83					
	06/23/2009	251.78	154.82					
	09/22/2009	254.97	156.78					
	12/28/2009	257.80	158.52					
		1,057.00	649.95					
NEW PERSPECTIVE FUND CLASS A	12/24/2009	1,084.38	1,084.38					130.42
FOREIGN 00 71 14300								
Dividends - US Corporations		7,238.29	5,265.28					
Dividends - Foreign Corporations		2,465.69	2,465.69					
Total		9,703.98	7,731.97	0.00	0.00	0.00	0.00	370.19

Recipient's Name and Address:

DAVID FELDMAN & SYDNEY FELDMAN
TTEE FBO DAVID J FELDMAN &

Account Number: 5XM-882422

Recipient's Identification
Number 22-2738773

**2009 TAX and
YEAR-END STATEMENT**

SCHEDULE of REALIZED GAINS and LOSSES

Disposition Date	Acquisition Date	Closing Transaction	Description	Security Identifier	Quantity	Cost Basis	Proceeds	Realized Gain/Loss
Short Term								
01/13/09	03/25/08	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	4 991	99 48	48 41	(51 07)
01/13/09	03/25/08	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	4 102	81 75	39 79	(41 96)
01/13/09	06/24/08	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	5 399	100 42	52 37	(48 05)
01/13/09	09/24/08	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	5 542	102 19	53 76	(48 43)
01/13/09	12/19/08	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	17 920	185 65	173 84	(11 81)
01/13/09	12/11/08	SELL	IVY GLOBAL NATURAL RESOURCES CLASS C	IGNCX	213 865	1,031 20	2,074 49	143 29
01/13/09	12/11/08	SELL	IVY GLOBAL NATURAL RESOURCES CLASS C	IGNCX	483 636	4,367 23	4,691 27	324 04
10/15/09	12/11/08	SELL	ALLIANZ NFJ DIVIDEND VALUE FUND	PNECX	39 920	367 66	400 00	32 34
10/15/09	12/11/08	SELL	ALLIANZ NFJ DIVIDEND VALUE FUND	PNECX	50 015	460 64	501 15	40 51
10/15/09	12/18/08	SELL	ALLIANZ NFJ DIVIDEND VALUE FUND	PNECX	9 055	84 48	90 73	6 25
10/15/09	03/19/09	SELL	ALLIANZ NFJ DIVIDEND VALUE FUND	PNECX	17 238	128 94	172 72	43 78
10/15/09	06/18/09	SELL	ALLIANZ NFJ DIVIDEND VALUE FUND	PNECX	11 107	96 52	111 29	14 77
10/15/09	09/17/09	SELL	ALLIANZ NFJ DIVIDEND VALUE FUND	PNECX	6 489	63 53	65 02	1 49
Total Short Term						8,069.69	8,474.84	405.15
Long Term								
01/13/09	01/08/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	531 073	9,453 10	5,151 41	(4,301 69)
01/13/09	01/26/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 961	33 71	19 02	(14 69)
01/13/09	02/23/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 911	33 80	18 54	(15 26)

Recipient's Name and Address:
DAVID FELDMAN & SYDNEY FELDMAN
TTEE FBO DAVID J FELDMAN &

Account Number: 5XM-882422
Recipient's Identification
Number 22-2738773

2009 TAX and
YEAR-END STATEMENT

TRANSACTIONS WE DO NOT REPORT TO THE IRS

SCHEDULE of REALIZED GAINS and LOSSES

(Continued)

(Continued)

Disposition Date	Acquisition Date	Closing Transaction	Description	Security Identifier	Quantity	Cost Basis	Proceeds	Realized Gain/Loss
Long Term (continued)								
01/13/09	03/25/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 850	33 89	17 94	(15 95)
01/13/09	04/26/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2 056	33 98	19 94	(14 04)
01/13/09	05/24/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2 087	34 08	20 24	(13 84)
01/13/09	06/24/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 928	34 18	18 70	(15 48)
01/13/09	07/26/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 946	34 27	18 88	(15 39)
01/13/09	08/25/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 827	34 37	17 72	(16 65)
01/13/09	09/24/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 850	34 46	17 94	(16 52)
01/13/09	10/27/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 743	34 54	16 91	(17 63)
01/13/09	11/23/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 705	34 63	16 54	(18 09)
01/13/09	12/22/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 712	34 71	16 61	(18 10)
01/13/09	12/22/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	16 053	325 40	155 71	(169 69)
01/13/09	12/22/04	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	33 177	672 49	321 82	(350 67)
01/13/09	01/25/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 936	37 15	18 78	(18 37)
01/13/09	02/23/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 953	37 25	18 94	(18 31)
01/13/09	03/28/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 986	37 34	19 26	(18 08)
01/13/09	04/25/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2 289	44 14	22 20	(21 94)
01/13/09	05/24/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2 135	44 27	20 71	(23 56)

Recipient's Name and Address:

DAVID FELDMAN & SYDNEY FELDMAN
TTEE FBO DAVID J FELDMAN &

Account Number: 5XM-882422

Recipient's Identification
Number 22-2738773

**2009 TAX and
YEAR-END STATEMENT**

TRANSACTIONS WE DO NOT REPORT TO THE IRS

SCHEDULE of REALIZED GAINS and LOSSES

(Continued)

(Continued)

Disposition Date	Acquisition Date	Closing Transaction	Description	Security Identifier	Quantity	Cost Basis	Proceeds	Realized Gain/Loss
01/13/09	06/24/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.082	14.39	20.20	(24.19)
01/13/09	07/25/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1.989	14.51	19.29	(25.22)
01/13/09	08/25/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.070	14.62	20.08	(24.54)
01/13/09	08/25/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	0.507	13.09	5.89	(7.20)
01/13/09	08/25/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.984	64.34	28.94	(35.40)
01/13/09	09/26/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.117	14.95	20.53	(24.42)
01/13/09	10/25/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.146	45.06	20.82	(24.24)
01/13/09	11/23/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.034	45.19	19.73	(25.46)
01/13/09	12/27/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.153	45.30	20.88	(24.42)
01/13/09	12/27/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	17.118	350.17	166.04	(194.13)
01/13/09	12/27/05	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	28.531	600.29	276.75	(323.54)
01/13/09	01/25/06	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.196	18.01	21.30	(26.71)
01/13/09	02/22/06	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.139	18.13	20.75	(27.38)
01/13/09	03/27/06	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.058	18.25	19.96	(28.29)
01/13/09	04/24/06	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.107	18.37	20.44	(27.93)
01/13/09	05/24/06	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.249	18.49	21.82	(26.67)
01/13/09	06/26/06	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2.181	18.62	21.16	(27.46)

Recipient's Name and Address:
DAVID FELDMAN & SYDNEY FELDMAN
TTEE FBO DAVID J FELDMAN &

Account Number: 5XM-882422

Recipient's Identification
Number 22-2738773

2009 TAX and YEAR-END STATEMENT



TRANSACTIONS WE DO NOT REPORT TO THE IRS

SCHEDULE of REALIZED GAINS and LOSSES

(Continued)

(Continued)

Disposition Date	Acquisition Date	Closing Transaction	Description	Security Identifier	Quantity	Cost Basis	Proceeds	Realized Gain/Loss
Long Term (continued)								
01/13/09	07/25/06	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	2 051	48 74	19 89	(28 85)
01/13/09	08/25/06	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 998	48 86	19 38	(29 48)
01/13/09	09/25/06	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 929	48 97	18 71	(30 26)
01/13/09	12/20/06	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	13 647	355 51	132 38	(223 13)
01/13/09	12/20/06	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	36 448	949 46	353 55	(595 91)
01/13/09	03/26/07	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 515	42 22	14 70	(27 52)
01/13/09	06/25/07	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	1 823	45 60	17 68	(27 92)
01/13/09	09/24/07	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	3 451	86 03	33 47	(52 56)
01/13/09	12/19/07	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	4 542	85 29	44 06	(41 23)
01/13/09	12/19/07	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	22 440	421 42	217 67	(203 75)
01/13/09	12/19/07	SELL	DWS RREEF REAL ESTATE SECURITIES	RRRAX	93 583	1 757 49	1 907 75	(849 74)
01/13/09	08/14/06	SELL	IVY GLOBAL NATURAL RESOURCES CLASS C	IGNCX	580 853	16 200 00	5 634 27	(10 565 73)
01/13/09	12/14/06	SELL	IVY GLOBAL NATURAL RESOURCES CLASS C	IGNCX	26 263	746 40	254 75	(491 65)
01/13/09	12/14/06	SELL	IVY GLOBAL NATURAL RESOURCES CLASS C	IGNCX	32 382	920 30	314 11	(606 19)
01/13/09	03/20/07	SELL	IVY GLOBAL NATURAL RESOURCES CLASS C	IGNCX	705 965	20 000 00	6 847 86	(13 152 14)
01/13/09	12/13/07	SELL	IVY GLOBAL NATURAL RESOURCES CLASS C	IGNCX	63 237	2 211 40	613 40	(1 598 00)
01/13/09	12/13/07	SELL	IVY GLOBAL NATURAL RESOURCES CLASS C	IGNCX	60 425	2 113 05	586 12	(1 526 93)

Recipient's Name and Address:

DAVID FELDMAN & SYDNEY FELDMAN
 TTEE FBO DAVID J FELDMAN &

Account Number: 5XM-882422

Recipient's Identification
 Number 22-2738713

**2009 TAX and
 YEAR-END STATEMENT**

TRANSACTIONS WE DO NOT REPORT TO THE IRS

SCHEDULE of REALIZED GAINS and LOSSES

(Continued)

(Continued)

Disposition Date	Acquisition Date	Closing Transaction	Description	Security Identifier	Quantity	Cost Basis	Proceeds	Realized Gain/Loss
Long Term (continued)								
01/13/09	12/13/07	SELL	IVY GLOBAL NATURAL RESOURCES CLASS C	IGNCX	6.541	228.73	63.45	(165.28)
10/15/09	08/15/06	SELL	ALLIANZ NFJ	PNECX	302.729	4,774.04	3,033.35	(1,740.69)
10/15/09	09/21/06	SELL	DIVIDEND VALUE FUND	PNECX	15.323	243.17	153.54	(89.63)
10/15/09	10/24/06	SELL	ALLIANZ NFJ	PNECX	422.450	7,000.00	4,232.95	(2,767.05)
10/15/09	12/14/06	SELL	DIVIDEND VALUE FUND	PNECX	36.690	623.37	367.63	(255.74)
10/15/09	12/14/06	SELL	ALLIANZ NFJ	PNECX	68.360	1,161.43	684.97	(476.46)
10/15/09	12/21/06	SELL	DIVIDEND VALUE FUND	PNECX	3.858	65.09	38.66	(26.43)
10/15/09	03/22/07	SELL	ALLIANZ NFJ	PNECX	24.578	424.95	246.27	(178.68)
10/15/09	06/21/07	SELL	DIVIDEND VALUE FUND	PNECX	17.913	329.96	179.49	(150.47)
10/15/09	09/20/07	SELL	ALLIANZ NFJ	PNECX	24.763	447.72	248.13	(199.59)
10/15/09	12/13/07	SELL	DIVIDEND VALUE FUND	PNECX	218.451	3,674.34	2,188.88	(1,485.46)
10/15/09	12/13/07	SELL	ALLIANZ NFJ	PNECX	127.532	2,145.09	1,277.87	(867.22)
10/15/09	12/20/07	SELL	DIVIDEND VALUE FUND	PNECX	0.004	0.07	0.04	(0.03)
10/15/09	03/20/08	SELL	ALLIANZ NFJ	PNECX	35.468	536.28	355.39	(180.89)
10/15/09	06/19/08	SELL	DIVIDEND VALUE FUND	PNECX	8.726	132.28	87.43	(44.85)
10/15/09	09/18/08	SELL	ALLIANZ NFJ	PNECX	7.645	107.33	76.60	(30.73)
Total Long Term						80,678.13	35,956.79	(44,721.34)
Total Short Term and Long Term						88,747.82	44,431.63	(44,316.19)

David J Feldman and Sydney E Feldman Charitable Trust
22-2378773

2009 Return of Private Foundation
Form 990-PF

Part 1 – Analysis of Revenue and Expenses

Line 16a – Legal Fees			
5/30/09	Gregory J. Englund, Esq.		\$1,825
Line 18 – Taxes			
2009	Deutsche Bank Alex Brown, foreign tax on dividends		370
Line 23 – Other Expenses			
5/13/09	Commonwealth of Massachusetts, Form PC filing fee		\$35
6/09/09	Dedham Savings Bank, check order		<u>59</u>
	Total		\$94

Part II - Balance Sheets

Line 10b - Investments - Corporate Stock

Shares	Security	Book Value	Market Value
3,254.736	Capital Income Builder Fund, Class A	144,018.77	155,869.31
1,533.724	Capital World Growth & Income Fund, Class A	42,721.71	52,269.31
1,180.087	Euro Pacific Growth Fund, Class A	28,542.82	45,244.54
1,579.152	Income Fund of America, Class A	21,135.00	24,461.06
1,852.820	Ivy Asset Strategy Fund, Class C	38,478.29	40,354.42
873.309	Ivy Global Natural Resources, Class C	14,200.00	14,130.14
3,165.232	New Perspective Fund Class A	65,912.85	81,156.55
29.000	Nortel Networks New, Com.	<u>6.03</u>	<u>0.67</u>
	Total	\$355,015.47	\$413,486.00

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

Line 3 – Other increases not included in line 2	
2008 uncashed checks	\$350
Nortel stock basis, not included on security account statements	<u>6</u>
Total	\$356
Line 5 – Decreases not included in line 2	
Net capital loss on sale of securities	\$44,316
See attached schedule of Gains and Losses	
Difference between market value and basis of gifted stock	22,327
2009 uncashed checks	1,530
Miscellaneous expenses	<u>22</u>
Total	\$68,195

David J Feldman and Sydney E Feldman Charitable Trust
22-2378773

2008 Return of Private Foundation
Form 990-PF

Part XV – Supplementary Information

Line 3a – Grants and Contributions Paid During the Year

Recipient	Purpose of Grant or Contribution	Amount
American Cancer Society	Medical	\$ 200
American Heart Association	Medical	100
American Society for Yad Vashem, Inc	Cultural	100
Anti-Deformation League	Social Justice	100
Art beCause Foundation	Arts	100
Avon Walk for Breast Cancer	Medical	100
Beth Israel Deaconess Hospital	Medical	600
B'NAI Brith International	Religious	85
Boston Academy of Talmudic Research	Education	500
Boston University	Education	100
Charles River Center	Social Welfare	425
Children's Hospital, Boston	Medical	100
Children's Hospital of Wisconsin	Medical	100
Circle of Caring, Hospice of The Good Shepherd	Social Welfare	300
Combined Jewish Philanthropies	Humanities	1,000
Davis Museum, Wellesley College	Art	50
Dress for Success	Social Welfare	500
James H. Farr Academy, Inc	Education	750
Foundation Fighting Blindness	Medical	50
Friend of Chatham Waterways, Inc	Environmental Mgmt	100
Friends of U S Holocaust Museum	Cultural	100
Grace Cottage Hospital	Medical	50
Hear Me Now	Education	250
Ivy St School, MAB Community Services	Education	15,000
The Jimmy Fund	Medical	75
Juvenile Diabetes Research Fund	Medical	250
Kansas City Hospice House	Medical	50
MAB Community Services	Social Welfare	6,000
Massachusetts Prostate Cancer Coalition	Medical	100
MDRT Foundation	Community Service	600
Memorial Sloan Kettering Cancer Center	Medical	100
Multiple Sclerosis Association of America	Medical	100
Museum of Fine Arts	Arts	2,250
Needham Golf Club Charities	Community Service	200

N E Sr Golf Association Charitable Gift Fund	Education	100
Orchard Cove Scholarship Fund	Education	50
Osher LifeLong Learning Institute of Brandeis University	Education	100
Pan Mass Challenge	Medical	1,550
Partners for Youths with Disabilities	Medical	50
The Perkins School for the Blind	Education	100
Planned Parenthood League of Mass	Medical	50
PMC – The Jimmy Fund	Medical	50
REACH	Social Welfare	1,100
The Rivers School	Education	200
Ronald McDonald House, Boston	Family Welfare	100
Rotary Club of Abington	Community Service	50
St Mary's Women and Children's Center	Social Welfare	2,700
St Sebastian Country Day School	Education	250
Shwachman Diamond Syndrome Foundation	Medical	200
Special Olympics Mass	Social Welfare	250
Summer Ink	Education	100
Summer Search, Boston	Social	250
Team Connor	Medical	250
Temple Beth Shalom	Religious	3,641
Temple Israel, Albany	Religious	500
Temple Mishkan Tefila	Religious	300
U S Holocaust Memorial Museum	Cultural	100
U S Olympic Committee	Cultural	80
United Way of Massachusetts Bay	Social Welfare	10,000
Vietnam Memorial of Mass , Inc	Cultural	100
Vietnam Veterans of Mass , Inc	Social Welfare	100
Walk 4 Hearing	Medical	100
WGBH	Education/Arts	560
TOTAL		\$53,416