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# Return of Private Foundation

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

### Treated as a Private Foundation

2009

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2009, or tax year beginning,

and ending

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS  
label.  
Otherwise,  
print  
or type  
See Specific  
Instructions

Name of foundation

THE WOOD FOUNDATION OF CHAMBERSBURG, PA

Number and street (or P.O. box number if mail is not delivered to street address)

Room/suite

ONE BRATTLE SQUARE, 4TH FLOOR

City or town, state, and ZIP code

CAMBRIDGE, MA 02138

A Employer identification number

25-1607838

B Telephone number

617-864-1420

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test,  
check here and attach computation ☐E If private foundation status was terminated  
under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationI Fair market value of all assets at end of year  
(from Part II, col (c), line 16)

\$ 6,935,571. (Part I, column (d) must be on cash basis)

J Accounting method ☒ Cash ☐ Accrual  
☐ Other (specify)

## Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

(a) Revenue and  
expenses per books(b) Net investment  
income(c) Adjusted net  
income(d) Disbursements  
for charitable purposes  
(cash basis only)

Revenue

Operating and Administrative Expenses

1 Contributions, gifts, grants, etc., received

2 Check ☒ if the foundation is not required to attach Sch. B3 Interest on savings and temporary  
cash investments

4 Dividends and interest from securities

257,754.

257,754.

STATEMENT 1

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

24,826.

b Gross sales price for all  
assets on line 6a

4,301,185.

7 Capital gain net income (from Part IV, line 2)

24,826.

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns  
and allowances

b Less Cost of goods sold

c Gross profit or (loss)

11 Other income

45.

45.

STATEMENT 2

12 Total. Add lines 1 through 11

282,625.

282,625.

13 Compensation of officers, directors, trustees, etc

38,000.

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees STMT 3

7,322.

0.

b Accounting fees STMT 4

37,199.

37,199.

c Other professional fees STMT 5

12,000.

0.

17 Interest

18 Taxes STMT 6

19,197.

6,697.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses STMT 7

1,846.

1,846.

24 Total operating and administrative  
expenses. Add lines 13 through 23

115,564.

45,742.

25 Contributions, gifts, grants paid

531,800.

26 Total expenses and disbursements.  
Add lines 24 and 25

647,364.

45,742.

27 Subtract line 26 from line 12:

&lt;364,739.&gt;

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

236,883.

c Adjusted net income (if negative, enter -0-)

N/A

<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	5,989.	7,368.	7,368.
	2 Savings and temporary cash investments	43,200.	42,646.	42,646.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment, basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ <b>STATEMENT 9</b> )	6,202,499.	5,826,941.	6,885,557.	
16 <b>Total assets (to be completed by all filers)</b>	6,251,688.	5,876,955.	6,935,571.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ )			
23 <b>Total liabilities (add lines 17 through 22)</b>	0.	0.		
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	6,251,688.	6,251,688.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	0.	<374,733.>		
30 <b>Total net assets or fund balances</b>	6,251,688.	5,876,955.		
31 <b>Total liabilities and net assets/fund balances</b>	6,251,688.	5,876,955.		

**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	6,251,688.
2 Enter amount from Part I, line 27a	2	<364,739.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	5,886,949.
5 Decreases not included in line 2 (itemize) ▶ <b>SEE STATEMENT 8</b>	5	9,994.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	5,876,955.

**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 BOSTON PRIVATE - SEE ATTACHED	P	VARIOUS	VARIOUS
b BOSTON PRIVATE - SEE ATTACHED	P	VARIOUS	VARIOUS
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 2,564,946.		2,519,496.	45,450.
b 1,736,239.		1,756,863.	<20,624.>
c			
d			
e			

  

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			45,450.
b			<20,624.>
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	24,826.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	588,194.	7,934,623.	.074130
2007	845,101.	8,925,303.	.094686
2006	578,005.	8,691,283.	.066504
2005	793,383.	9,010,379.	.088052
2004	730,179.	9,144,782.	.079847

  

2 Total of line 1, column (d)	2	.403219
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	.080644
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	6,658,168.
5 Multiply line 4 by line 3	5	536,941.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,369.
7 Add lines 5 and 6	7	539,310.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	531,800.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <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 type="checkbox"/> and enter 1% of Part I, line 27b		1	4,738.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	4,738.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	4,738.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	8,173.	
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	8,173.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	3,435.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> 3,435. Refunded <input type="checkbox"/>	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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> PA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► C. O. WOOD, III Telephone no. ► 717-267-3174 Located at ► ONE BRATTLE SQUARE, 4TH FLOOR, CAMBRIDGE, MA ZIP+4 ► 02138			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year		15	N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<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 checked="" type="checkbox"/> Yes <input 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)? Organizations relying on a current notice regarding disaster assistance check here		1b X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
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.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b X

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**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required** (continued)

5a. During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

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

N/A

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CHARLES O. WOOD, III ONE BRATTLE SQUARE CAMBRIDGE, MA 02138	TRUSTEE 0.00	36,000.	0.	0.
MIRIAM M. WOOD ONE BRATTLE SQUARE CAMBRIDGE, MA 02138	TRUSTEE 0.00	0.	0.	0.
EMILIE W. ROBINSON 5427 ROYAL MILE BOULEVARD SALISBURY, MD 21801	TRUSTEE 0.00	1,000.	0.	0.
DAVID S. WOOD 2815 PIEDMONT STREET BERKELEY, CA 94705	TRUSTEE 0.00	1,000.	0.	0.

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

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

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

▶ 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. 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

0

**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/A	
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments

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

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	6,336,680.
b	Average of monthly cash balances	1b	422,881.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	6,759,561.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	6,759,561.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	101,393.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,658,168.
6	Minimum investment return. Enter 5% of line 5	6	332,908.

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

1	Minimum investment return from Part X, line 6	1	332,908.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	4,738.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	4,738.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	328,170.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	328,170.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	328,170.

**Part XII** Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	531,800.
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	531,800.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	531,800.

**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 instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7				328,170.
<b>2</b> Undistributed income, if any, as of the end of 2009				
<b>a</b> Enter amount for 2008 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2009				
<b>a</b> From 2004	281,026.			
<b>b</b> From 2005	348,478.			
<b>c</b> From 2006	151,593.			
<b>d</b> From 2007	406,688.			
<b>e</b> From 2008	199,750.			
<b>f</b> Total of lines 3a through e	1,387,535.			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4: ▶ \$ 531,800.				
<b>a</b> Applied to 2008, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2009 distributable amount				328,170.
<b>e</b> Remaining amount distributed out of corpus	203,630.			
<b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,591,165.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7	281,026.			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,310,139.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2005	348,478.			
<b>b</b> Excess from 2006	151,593.			
<b>c</b> Excess from 2007	406,688.			
<b>d</b> Excess from 2008	199,750.			
<b>e</b> Excess from 2009	203,630.			



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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i>				
SEE STATEMENT 11				
<b>Total</b>			<b>3a</b>	531,800.
<b>b</b> <i>Approved for future payment</i>				
NONE				
<b>Total</b>			<b>3b</b>	0.





FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BOSTON PRIVATE - ACCRUED MARKET DISCOUNT	5,327.	0.	5,327.
BOSTON PRIVATE - AMORTIZATION OF PREMIUM	<14,548.>	0.	<14,548.>
BOSTON PRIVATE - AMORTIZATION OF PREMIUM-US TREASURY	<388.>	0.	<388.>
BOSTON PRIVATE - INTEREST	176,169.	0.	176,169.
BOSTON PRIVATE - NON-QUALIFIED DIVIDENDS	710.	0.	710.
BOSTON PRIVATE - ORIGINAL ISSUE DISCOUNT	3,485.	0.	3,485.
BOSTON PRIVATE - QUALIFIED DIVIDENDS	76,734.	0.	76,734.
BOSTON PRIVATE - US INTEREST	10,265.	0.	10,265.
TOTAL TO FM 990-PF, PART I, LN 4	257,754.	0.	257,754.

FORM 990-PF	OTHER INCOME	STATEMENT	2
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
SECURITY LITIGATION	45.	45.	
TOTAL TO FORM 990-PF, PART I, LINE 11	45.	45.	

FORM 990-PF	LEGAL FEES			STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LOVETT BOOKMAN HARMON MARKS LLP	7,322.	0.			0.
TO FM 990-PF, PG 1, LN 16A	7,322.	0.			0.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BOSTON PRIVATE - MANAGEMENT FEES	37,199.	37,199.		0.	
TO FORM 990-PF, PG 1, LN 16B	37,199.	37,199.		0.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
CLERICAL FEE - WHI	12,000.	0.		0.	
TO FORM 990-PF, PG 1, LN 16C	12,000.	0.		0.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BOSTON PRIVATE - FOREIGN TAXES PAID	6,697.	6,697.		0.	
EXCISE TAXES	12,500.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	19,197.	6,697.		0.	



FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BOSTON PRIVATE - INTEREST INVESTMENT EXPENSE	1,846.	1,846.			0.
TO FORM 990-PF, PG 1, LN 23	1,846.	1,846.			0.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
DESCRIPTION		AMOUNT	
PRIOR PERIOD ADJUSTMENT-ZERO OUT ACCRD INTEREST PD ACCOUNT		9,994.	
TOTAL TO FORM 990-PF, PART III, LINE 5		9,994.	

FORM 990-PF	OTHER ASSETS		STATEMENT	9
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE	
US GOVERNMENT AGENCY BONDS	1,128,074.	722,590.	754,033.	
CORPORATE AND FOREIGN BONDS	2,273,607.	2,347,459.	2,418,114.	
EQUITIES	2,790,824.	2,756,891.	3,713,409.	
DIVIDENDS RECEIVABLE	0.	1.	1.	
ACCRUED INTEREST PAID	9,994.	0.	0.	
TO FORM 990-PF, PART II, LINE 15	6,202,499.	5,826,941.	6,885,557.	

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 10

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CHARLES O. WOOD III  
ONE BRATTLE SQUARE, 4TH FLOOR  
CAMBRIDGE, MA 02138

TELEPHONE NUMBER

(617)864-1420

FORM AND CONTENT OF APPLICATIONS

WHILE THERE IS NO SPECIFIC FORM OF GRANT REQUEST, APPLICANTS SHOULD PROVIDE SUFFICIENT DETAIL TO ENABLE THE FOUNDATION TO COMPLETELY EVALUATE THEIR REQUEST.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

FIRST CONSIDERATION WILL BE GIVEN TO ORGANIZATIONS SERVING THE CHAMBERSBURG-FRANKLIN COUNTIES OF PENNSYLVANIA

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 11

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AMERICAN CONSERVATORY THEATRE 30 GRANT AVE. SIXTH FLOOR SAN FRANCISCO, CA 94108	NONE GENERAL	501 (C)(3)	500.
AURORA THEATRE 2081 ADDISON STREET BERKELEY, CA 94704	NONE GENERAL	501 (C)(3)	23,000.
CELEBRITY SERIES OF BOSTON 20 PARK PLAZA BOSTON, MA 02116	NONE GENERAL	501 (C)(3)	50,000.
CREATIVE GROWTH 355 24TH STREET OAKLAND, CA 94612	NONE GENERAL	501 (C)(3)	10,000.
DELAWARE GUIDANCE SERVICES FOR YOUTH 1213 DELAWARE AVENUE WILMINGTON, DE 19806	NONE GENERAL	501 (C)(3)	5,000.
FRIENDS OF AMERICAN ART AT YALE P.O. BOX 208271 NEW HAVEN, CT 06520	NONE GENERAL	501 (C)(3)	5,000.
HARVARD GRADUATE SCHOOL OF EDUCATION 44R BRATTLE STREET CAMBRIDGE, MA 02238	NONE GENERAL	501 (C)(3)	5,000.
IDEX 827 VALENCIA STREET, SUITE 101 SAN FRANCISCO, CA 94110	NONE GENERAL	501 (C)(3)	1,000.

ISABELLA STEWART GARDNER MUSEUM 2 PALACE ROAD BOSTON, MA	NONE GENERAL	501 (C)(3)	362,800.
NORTHGATE HIGH SCHOOL SR. PROJECT 425 CASTLE ROCK ROAD WALNUT CREEK, CA 94598	NONE GENERAL	501 (C)(3)	1,500.
OAKLAND MUSEUM EDUCATIONAL FUND 1000 OAK STREET OAKLAND, CA 94607	NONE GENERAL	501 (C)(3)	1,000.
PHILLIPS EXETER ACADEMY 20 MAIN STREET ANDOVER, MA 01810	NONE GENERAL	501 (C)(3)	5,000.
RICHMOND ART CENTER 2540 BARRETT AVENUE RICHMOND, CA 94804	NONE GENERAL	501 (C)(3)	500.
RIVER OF WORDS 2547 EIGHTH STREET 13B BERKELEY, CA 94710	NONE GENERAL	501 (C)(3)	16,500.
SALISBURY UNIVERSITY FOUNDATION P.O. BOX 2655 SALISBURY, MD 21802	NONE GENERAL	501 (C)(3)	12,500.
SAN FRANCISCO HEALTH CONSORTIUM 1550 BRYANT STREET, SUITE 450 SAN FRANCISCO, CA 94103	NONE GENERAL	501 (C)(3)	1,500.
WOMEN'S DAY TIME DROP-IN CENTER 2218 ACTON STREET BERKELEY, CA 94702	NONE GENERAL	501 (C)(3)	1,000.
WINTERTHUR MUSEUM & COUNTRY ESTATE WINTERTHUR, DE 19735	NONE GENERAL	501 (C)(3)	20,000.

THE WOOD FOUNDATION OF CHAMBERSBURG, PA

25-1607838

YOUTH RADIO NONE  
1701 BROADWAY AVENUE OAKLAND, GENERAL  
CA 94612

501 (C)(3) 10,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

531,800.

# 2009 Tax Information Statement

Page 7 of 30

Account Number: 755D6000

Recipient's Tax ID number: 25-1607838

Payer's Federal ID number: 33-1023320

Questions? (617)912-4254

☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address  
BOSTON PRIVATE BANK & TRUST CO  
INVESTMENT MANAGEMENT  
TEN POST OFFICE SQUARE  
BOSTON, MA 02109

Recipient's Name and Address  
THE WOOD FOUNDATION OF  
CHAMBERSBURG  
ONE BRATTLE SQUARE, 4TH FLOOR  
CAMBRIDGE, MA 02138

## 2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date (Box 1a)		Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
			Acquired	Date of Sale				
Short Term Sales Reported on 1099-B								
200000.0000	01958XBH9	ALLIED WASTE NA 7.375%	4/15/14	09/18/2009	12/07/2009	207,376.00	207,376.00	0.00
150000.0000	01958XAZ0	ALLIED WASTE NA 7.875%	4/15/13	08/11/2009	11/30/2009	153,937.50	153,862.15	75.35
150000.0000	7778849	AMER EXP TRAVEL MTN 3.625%	2/20/09	09/25/2008	02/20/2009	150,000.00	150,000.00	0.00
100000.0000	149123BP5	CATERPILLAR INC 7.000%	12/15/13	12/02/2008	08/20/2009	114,346.00	99,976.00	14,370.00
50000.0000	25459HAG0	DIRECTV HLDGS/FN 7.625%	5/15/16	08/12/2009	12/22/2009	54,687.50	52,398.42	2,289.08
150000.0000	260543BR3	DOW CHEMICAL 6.000%	10/01/12	04/14/2008	01/07/2009	144,744.00	156,811.38	-12,067.38
8500.0000	81369Y605	FINANCIAL SELECT SECTOR SPDR		03/10/2009	03/16/2009	68,679.61	58,599.00	10,080.61
8500.0000	81369Y605	FINANCIAL SELECT SECTOR SPDR		03/10/2009	03/19/2009	80,004.07	58,599.00	21,405.07
100000.0000	31398AKL5	FNMA 5.500% 12/14/22		03/13/2009	12/14/2009	100,000.00	100,000.00	0.00
7910.2500	31371LEA3	FNMA PL #254929 3.500%	9/01/13	05/20/2008	01/25/2009	7,910.25	7,850.46	59.79
10702.8500	31371LEA3	FNMA PL #254929 3.500%	9/01/13	05/20/2008	02/25/2009	10,702.85	10,626.17	76.68
8815.2800	31371LEA3	FNMA PL #254929 3.500%	9/01/13	05/20/2008	03/25/2009	8,815.28	8,755.37	59.91
9870.3200	31371LEA3	FNMA PL #254929 3.500%	9/01/13	05/20/2008	04/25/2009	9,870.32	9,807.32	63.00
50000.0000	349631AM3	FORTUNE BRANDS INC 5.125%	1/15/11	07/31/2009	11/18/2009	51,764.00	50,653.53	1,110.47
1600.0000	372460105	GENUINE PARTS CO		11/07/2008	04/20/2009	54,329.96	59,717.12	-5,387.16
50000.0000	38146FAF8	GOLDMAN SACHS GP 1.625%	7/15/11	02/06/2009	11/24/2009	50,657.00	49,857.50	799.50

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

# 2009 Tax Information Statement

Account Number: 755D6000

Recipient's Tax ID number: 25-1607838

Payer's Federal ID number: 33-1023320

Questions? (617)912-4254

☐ Corrected ☐ 2nd TIN notice

**Payer's Name and Address**  
BOSTON PRIVATE BANK & TRUST CO  
INVESTMENT MANAGEMENT  
TEN POST OFFICE SQUARE  
BOSTON, MA 02109

**Recipient's Name and Address**  
THE WOOD FOUNDATION OF  
CHAMBERSBURG  
ONE BRATTLE SQUARE, 4TH FLOOR  
CAMBRIDGE, MA 02138

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date		Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
			Acquired	Sale					
50000.0000	428236AT0	HEWLETT-PACK CO 6.125% 3/01/14	12/02/2008	07/30/2009		55,865.50	49,983.50	5,882.00	0.00
150000.0000	437076AN2	HOME DEPOT INC 5.200% 3/01/11	11/20/2008	08/13/2009		156,196.50	143,050.99	13,145.51	0.00
100000.0000	452308AE9	ILLINOIS TOOL WORKS 5.750% 3/01/09	10/07/2008	03/01/2009		100,000.00	100,000.00	0.00	0.00
1400.0000	61166W101	MONSANTO CO NEW	10/16/2008	09/23/2009		109,049.73	110,173.70	-1,123.97	0.00
2050.0000	66987V109	NOVARTIS AG SPONS ADR	12/05/2008	04/20/2009		72,949.83	97,272.30	-24,322.47	0.00
150000.0000	887389AF1	TIMKEN CO 5.750% 2/15/10	05/19/2009	09/09/2009		152,011.50	150,320.48	1,691.02	0.00
100000.0000	912828JH4	U.S. TREASURY NOTES 4.000% 8/15/18	09/08/2008	05/18/2009		106,707.03	102,763.45	3,943.58	0.00
100000.0000	92553PAE2	VIACOM INC 4.375% 9/15/14	08/19/2009	09/28/2009		101,802.00	99,291.00	2,511.00	0.00
100000.0000	25468PBX3	WALT DISNEY CO MTN 6.375% 3/01/12	11/03/2008	10/01/2009		110,445.00	101,250.46	9,194.54	0.00
100000.0000	94973VAF4	WELLPOINT INC 4.250% 12/15/09	02/18/2009	09/11/2009		100,834.00	99,847.45	986.55	0.00
100000.0000	92931BAA4	WPS RESOURCES CORP 7.000% 11/01/09	02/18/2009	09/22/2009		100,509.00	100,244.09	264.91	0.00
3000.0000	983024100	WYETH	04/07/2008	01/28/2009		130,751.23	130,408.80	342.43	0.00
Total Short Term Sales Reported on 1099-B						2,564,945.66	2,519,495.64	45,450.02	0.00
Long Term 15% Sales Reported on 1099-B									
50000.0000	002819AA8	ABBOTT LABORATORIES 5.150% 11/30/12	11/06/2007	07/31/2009		54,932.50	49,980.50	4,952.00	0.00
100000.0000	260003AD0	DOVER CORP 6.500% 2/15/11	05/18/2007	08/06/2009		107,109.00	101,720.09	5,388.91	0.00
2000.0000	292505104	ENCANA CORP	10/26/2005	01/30/2009		88,728.50	96,818.73	-8,090.23	0.00

# 2009 Tax Information Statement

Account Number: 755D6000

Recipient's Name and Address

Recipient's Tax ID number: 25-1607838

THE WOOD FOUNDATION OF

Payer's Federal ID number: 33-1023320

CHAMBERSBURG

Questions? ☐ Corrected ☐ 2nd TIN notice

(617)912-4254

ONE BRATTLE SQUARE, 4TH FLOOR  
CAMBRIDGE, MA 02138

**Payer's Name and Address**  
BOSTON PRIVATE BANK & TRUST CO  
INVESTMENT MANAGEMENT  
TEN POST OFFICE SQUARE  
BOSTON, MA 02109

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date (Box 1a)		Date of Sale (Box 2)		Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
			Acquired	Sale	Bonds, etc.	Stocks			
100000.0000	31359MEY5	FEDERAL NATL MTG ASSN MEDIUM TERM INT	12/20/2000	09/15/2009	100,000.00	100,000.00	0.00	0.00	0.00
1179.6000	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	01/15/2009	1,179.60	1,177.16	2.44	0.00	0.00
2303.0800	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	02/15/2009	2,303.08	2,298.32	4.76	0.00	0.00
3546.9600	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	03/15/2009	3,546.96	3,539.63	7.33	0.00	0.00
3639.8500	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	04/15/2009	3,639.85	3,632.33	7.52	0.00	0.00
3724.3400	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	05/15/2009	3,724.34	3,716.65	7.69	0.00	0.00
4047.9700	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	06/15/2009	4,047.97	4,039.61	8.36	0.00	0.00
3651.7600	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	07/15/2009	3,651.76	3,644.22	7.54	0.00	0.00
2624.5900	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	08/15/2009	2,624.59	2,619.17	5.42	0.00	0.00
1896.5100	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	09/15/2009	1,896.51	1,892.59	3.92	0.00	0.00
1643.9400	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	10/15/2009	1,643.94	1,640.54	3.40	0.00	0.00
1727.2900	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	11/15/2009	1,727.29	1,723.72	3.57	0.00	0.00
2026.2600	31396C3C2	FHLMC SER R003-CMO 5 125% 10/15/15	10/20/2005	12/15/2009	2,026.26	2,022.07	4.19	0.00	0.00
249.6700	31371K5Y3	FNMA PL #254763 6 000% 5/01/23	03/10/2004	01/25/2009	249.67	255.08	-5.41	0.00	0.00
96.1200	31371K5Y3	FNMA PL #254763 6 000% 5/01/23	03/10/2004	02/25/2009	96.12	98.13	-2.01	0.00	0.00
314.2800	31371K5Y3	FNMA PL #254763 6 000% 5/01/23	03/10/2004	03/25/2009	314.28	320.56	-6.28	0.00	0.00
462.4900	31371K5Y3	FNMA PL #254763 6 000% 5/01/23	03/10/2004	04/25/2009	462.49	471.25	-8.76	0.00	0.00
298.7700	31371K5Y3	FNMA PL #254763 6 000% 5/01/23	03/10/2004	05/25/2009	298.77	304.14	-5.37	0.00	0.00
486.5900	31371K5Y3	FNMA PL #254763 6 000% 5/01/23	03/10/2004	06/25/2009	486.59	495.02	-8.43	0.00	0.00

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# 2009 Tax Information Statement

Page 10 of 30

Account Number:

755D6000

Recipient's Name and Address

Recipient's Tax ID number:

25-1607838

THE WOOD FOUNDATION OF

Payer's Federal ID number:

33-1023320

CHAMBERSBURG

Questions?

(617)912-4254

ONE BRATTLE SQUARE, 4TH FLOOR

☐ Corrected

☐ 2nd TIN notice

CAMBRIDGE, MA 02138

Payer's Name and Address

BOSTON PRIVATE BANK & TRUST CO

INVESTMENT MANAGEMENT

TEN POST OFFICE SQUARE

BOSTON, MA 02109

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
491.5300	31371K5Y3	FNMA PL #254763	03/10/2004	07/25/2009	491.53	499.74	-8.21	0.00
122.5700	31371K5Y3	FNMA PL #254763	03/10/2004	08/25/2009	122.57	124.54	-1.97	0.00
321.6700	31371K5Y3	FNMA PL #254763	03/10/2004	09/25/2009	321.67	326.65	-4.98	0.00
376.8600	31371K5Y3	FNMA PL #254763	03/10/2004	10/25/2009	376.86	382.49	-5.63	0.00
395.4300	31371K5Y3	FNMA PL #254763	03/10/2004	11/25/2009	395.43	401.13	-5.70	0.00
339.0800	31371K5Y3	FNMA PL #254763	03/10/2004	12/25/2009	339.08	343.79	-4.71	0.00
9237.6500	31371LEA3	FNMA PL #254929	05/20/2008	05/25/2009	9,237.65	9,182.41	55.24	0.00
7613.8500	31371LEA3	FNMA PL #254929	05/20/2008	06/25/2009	7,613.85	7,571.35	42.50	0.00
7612.3000	31371LEA3	FNMA PL #254929	05/20/2008	07/25/2009	7,612.30	7,572.76	39.54	0.00
7372.6100	31371LEA3	FNMA PL #254929	05/20/2008	08/25/2009	7,372.61	7,337.30	35.31	0.00
6347.4400	31371LEA3	FNMA PL #254929	05/20/2008	09/25/2009	6,347.44	6,319.69	27.75	0.00
7382.8600	31371LEA3	FNMA PL #254929	05/20/2008	10/25/2009	7,382.86	7,353.61	29.25	0.00
7186.2900	31371LEA3	FNMA PL #254929	05/20/2008	11/25/2009	7,186.29	7,160.91	25.38	0.00
7303.9400	31371LEA3	FNMA PL #254929	05/20/2008	12/25/2009	7,303.94	7,281.21	22.73	0.00
52.6100	31402DF47	FNMA PL #725687 V-M	11/01/2006	01/25/2009	52.61	52.84	-0.23	0.00
2173.8400	31402DF47	FNMA PL #725687 V-M	11/01/2006	02/25/2009	2,173.84	2,183.25	-9.41	0.00
3399.2800	31402DF47	FNMA PL #725687 V-M	11/01/2006	03/25/2009	3,399.28	3,413.74	-14.46	0.00
44.4800	31402DF47	FNMA PL #725687 V-M	11/01/2006	04/25/2009	44.48	44.67	-0.19	0.00
838.9900	31402DF47	FNMA PL #725687 V-M	11/01/2006	05/25/2009	838.99	842.43	-3.44	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

# 2009 Tax Information Statement

Page 1.1 of 30

Account Number: 755D6000

Recipient's Name and Address  
THE WOOD FOUNDATION OF  
CHAMBERSBURG

Recipient's Tax ID number:  
33-1023320

Payer's Federal ID number:  
(617)912-4254

Questions?  
☐ 2nd TIN notice

Payer's Name and Address  
BOSTON PRIVATE BANK & TRUST CO  
INVESTMENT MANAGEMENT  
TEN POST OFFICE SQUARE  
BOSTON, MA 02109

☐ Corrected

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
44.0400	31402DF47	FNMA PL #725687 V-M	11/01/2006	06/25/2009	44.04	44.22	-0.18	0.00
2058.1800	31402DF47	FNMA PL #725687 V-M	11/01/2006	07/25/2009	2,058.18	2,066.31	-8.13	0.00
41.2000	31402DF47	FNMA PL #725687 V-M	11/01/2006	08/25/2009	41.20	41.36	-0.16	0.00
46.8500	31402DF47	FNMA PL #725687 V-M	11/01/2006	09/25/2009	46.85	47.03	-0.18	0.00
51.8200	31402DF47	FNMA PL #725687 V-M	11/01/2006	10/25/2009	51.82	52.01	-0.19	0.00
79.1600	31402DF47	FNMA PL #725687 V-M	11/01/2006	11/25/2009	79.16	79.45	-0.29	0.00
54.9200	31402DF47	FNMA PL #725687 V-M	11/01/2006	12/25/2009	54.92	55.12	-0.20	0.00
70.9300	31410YZD9	FNMA PL #901740 V-M	11/29/2006	01/25/2009	70.93	71.09	-0.16	0.00
72.5700	31410YZD9	FNMA PL #901740 V-M	11/29/2006	02/25/2009	72.57	72.73	-0.16	0.00
76.8900	31410YZD9	FNMA PL #901740 V-M	11/29/2006	03/25/2009	76.89	77.06	-0.17	0.00
74.6300	31410YZD9	FNMA PL #901740 V-M	11/29/2006	04/25/2009	74.63	74.79	-0.16	0.00
78.9000	31410YZD9	FNMA PL #901740 V-M	11/29/2006	05/25/2009	78.90	79.06	-0.16	0.00
77.9400	31410YZD9	FNMA PL #901740 V-M	11/29/2006	06/25/2009	77.94	78.10	-0.16	0.00
78.3000	31410YZD9	FNMA PL #901740 V-M	11/29/2006	07/25/2009	78.30	78.46	-0.16	0.00
76.0100	31410YZD9	FNMA PL #901740 V-M	11/29/2006	08/25/2009	76.01	76.16	-0.15	0.00
77.6800	31410YZD9	FNMA PL #901740 V-M	11/29/2006	09/25/2009	77.68	77.83	-0.15	0.00
76.7100	31410YZD9	FNMA PL #901740 V-M	11/29/2006	10/25/2009	76.71	76.85	-0.14	0.00
8690.1200	31410YZD9	FNMA PL #901740 V-M	11/29/2006	11/25/2009	8,690.12	8,706.00	-15.88	0.00
80.3900	31410YZD9	FNMA PL #901740 V-M	11/29/2006	12/25/2009	80.39	80.53	-0.14	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



# 2009 Tax Information Statement

Account Number: 755D6000

Recipient's Tax ID number: 25-1607838

Payer's Federal ID number: 33-1023320

Questions? (617)912-4254

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address

THE WOOD FOUNDATION OF

CHAMBERSBURG

ONE BRATTLE SQUARE, 4TH FLOOR

CAMBRIDGE, MA 02138

Payer's Name and Address

BOSTON PRIVATE BANK & TRUST CO

INVESTMENT MANAGEMENT

TEN POST OFFICE SQUARE

BOSTON, MA 02109

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
1179.8400	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	01/25/2009	1,179.84	1,112.37	67.47	0.00
1408.9400	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	02/25/2009	1,408.94	1,328.37	80.57	0.00
2123.7900	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	03/25/2009	2,123.79	2,002.34	121.45	0.00
2237.7100	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	04/25/2009	2,237.71	2,109.74	127.97	0.00
2158.3400	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	05/25/2009	2,158.34	2,034.91	123.43	0.00
2077.7900	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	06/25/2009	2,077.79	1,958.97	118.82	0.00
2435.3600	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	07/25/2009	2,435.36	2,296.09	139.27	0.00
2080.5100	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	08/25/2009	2,080.51	1,961.53	118.98	0.00
1656.0800	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	09/25/2009	1,656.08	1,561.37	94.71	0.00
1676.7200	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	10/25/2009	1,676.72	1,580.83	95.89	0.00
1712.6500	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	11/25/2009	1,712.65	1,614.71	97.94	0.00
1666.8200	31394BVF8	FNMA SER 90 CMO 4.350% 3/25/34	06/15/2006	12/25/2009	1,666.82	1,571.50	95.32	0.00
100000.0000	377372AC1	GLAXOSMITHKLINE 4.850% 5/15/13	05/06/2008	12/17/2009	108,432.00	99,789.00	8,643.00	0.00
741.5000	36225C7B6	GNMA PL #080889 V-M 3.000% 4/20/34	05/25/2006	01/20/2009	741.50	454.63	286.87	0.00
460.7200	36225C7B6	GNMA PL #080889 V-M 3.000% 4/20/34	05/25/2006	02/20/2009	460.72	274.80	185.92	0.00
874.0200	36225C7B6	GNMA PL #080889 V-M 3.000% 4/20/34	05/25/2006	03/20/2009	874.02	508.14	365.88	0.00
634.7000	36225C7B6	GNMA PL #080889 V-M 3.000% 4/20/34	05/25/2006	04/20/2009	634.70	369.01	265.69	0.00
487.2800	36225C7B6	GNMA PL #080889 V-M 3.000% 4/20/34	05/25/2006	05/20/2009	487.28	283.30	203.98	0.00
505.8600	36225C7B6	GNMA PL #080889 V-M 3.000% 4/20/34	05/25/2006	06/20/2009	505.86	294.10	211.76	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

# 2009 Tax Information Statement

Page 13 of 30

Account Number: 755D6000

Recipient's Tax ID number: 25-1607838

Payer's Federal ID number: 33-1023320

Questions? (617)912-4254

☐ Corrected

☐ 2nd TIN notice

## Payer's Name and Address

BOSTON PRIVATE BANK & TRUST CO  
INVESTMENT MANAGEMENT  
TEN POST OFFICE SQUARE  
BOSTON, MA 02109

## Recipient's Name and Address

THE WOOD FOUNDATION OF  
CHAMBERSBURG  
ONE BRATTLE SQUARE, 4TH FLOOR  
CAMBRIDGE, MA 02138

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
456.3900	36225C7B6	GNMA PL #080889 V-M 3.000%	4/20/34	05/25/2006	07/20/2009	456.39	265.34	191.05
634.0900	36225C7B6	GNMA PL #080889 V-M 3.000%	4/20/34	05/25/2006	08/20/2009	634.09	368.65	265.44
635.8600	36225C7B6	GNMA PL #080889 V-M 3.000%	4/20/34	05/25/2006	09/20/2009	635.86	369.68	266.18
190.9300	36225C7B6	GNMA PL #080889 V-M 3.000%	4/20/34	05/25/2006	10/20/2009	190.93	111.00	79.93
384.3600	36225C7B6	GNMA PL #080889 V-M 3.000%	4/20/34	05/25/2006	11/20/2009	384.36	223.46	160.90
723.2300	36225C7B6	GNMA PL #080889 V-M 3.000%	4/20/34	05/25/2006	12/20/2009	723.23	420.48	302.75
4000.0000	571748102	MARSH & MCCLENNAN	10/21/2008	11/02/2009	92,997.60	109,828.40	-16,830.80	0.00
3800.0000	594918104	MICROSOFT CORP	VARIOUS	01/30/2009	65,025.22	14,572.56	50,452.66	0.00
200000.0000	748148QQ9	QUEBEC PROVINCE 5.750%	2/15/09	11/09/2004	02/15/2009	200,000.00	200,000.00	0.00
2400.0000	826552101	SIGMA ALDRICH CORP	11/15/2007	01/30/2009	86,898.44	123,408.72	-36,510.28	0.00
3600.0000	882508104	TEXAS INSTRUMENTS.COM	10/31/2007	04/20/2009	62,821.26	117,732.96	-54,911.70	0.00
125000.0000	912828F08	U.S. TREASURY NOTES 4.875%	8/15/16	09/26/2006	05/18/2009	142,451.17	127,221.39	15,229.78
1650.0000	913017109	UNITED TECHNOLOGIES CORP.COM	11/15/2007	04/20/2009	75,333.93	121,702.36	-46,368.43	0.00
150000.0000	91324PAP7	UNITEDHEALTH GROUP 5.250%	3/15/11	02/28/2006	11/18/2009	156,684.00	150,074.62	6,609.38
175000.0000	931142BE2	WAL MART STORES INC 6.875%	8/10/09	04/05/2005	08/10/2009	175,000.00	175,000.00	0.00
4100.0000	949746101	WELLS FARGO & CO NEW.COM	06/22/1995	04/09/2009	76,241.64	29,719.87	46,521.77	0.00
Total Long Term 15% Sales Reported on 1099-B					1,736,239.34	1,756,863.38	-20,624.04	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



Form **8868**

(Rev. April 2009)

Department of the Treasury  
Internal Revenue Service**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No. 1545-1709

► File a separate application for each return

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete **Part II** unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed)A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

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

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

Type or print  File by the due date for filing your return. See instructions.	Name of Exempt Organization	Employer identification number
	<b>THE WOOD FOUNDATION OF CHAMBERSBURG, PA</b>	<b>25-1607838</b>
	Number, street, and room or suite no. If a P O box, see instructions. <b>ONE BRATTLE SQUARE, 4TH FLOOR</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>CAMBRIDGE, MA 02138</b>	

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

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

**PARAGON ADVISORS, INC.**

- The books are in the care of ► **20820 CHAGRIN BLVD SUITE #300 - SHAKER HEIGHTS, OH 44122**  
Telephone No ► **(216) 491-3990** FAX No ► \_\_\_\_\_

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

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ calendar year **2009** or
- ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

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

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	<b>4,798.</b>
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	<b>8,173.</b>
<b>c</b> <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	<b>0.</b>

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

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

Form 8868 (Rev. 4-2009)

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

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1)

<b>Part II</b>		<b>Additional (Not Automatic) 3-Month Extension of Time.</b> Only file the original (no copies needed)	
Type or print  File by the extended due date for filing the return See instructions	Name of Exempt Organization		Employer identification number
	THE WOOD FOUNDATION OF CHAMBERSBURG, PA		25-1607838
	Number, street, and room or suite no. If a P O box, see instructions		For IRS use only
	ONE BRATTLE SQUARE, 4TH FLOOR		
	City, town or post office, state, and ZIP code For a foreign address, see instructions		
	CAMBRIDGE, MA 02138		

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

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

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

C. O. WOOD, III

- The books are in the care of **ONE BRATTLE SQUARE, 4TH FLOOR - CAMBRIDGE, MA 02138**

Telephone No **717-267-3174**

FAX No

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2010**

5 For calendar year **2009**, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

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

7 State in detail why you need the extension

**ADDITIONAL TIME IS REQUESTED TO OBTAIN FINANCIAL INFORMATION FROM OUTSIDE PARTIES IN ORDER TO COMPLETE THIS RETURN.**

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	8a	\$	4,738.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	\$	8,173.
c	Balance Due. Subtract line 8b from line 8a Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	8c	\$	0.

### Signature and Verification

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

Signature **▶**

Title **▶ CPA**

Date **▶**