Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

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

G Check all that apply: [X] 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
LAWLER, ANNA CHARITABLE TRUST
PNC BANK

Number and street (or P.O box number if mail is not delivered to street address) | Room/suite
P O BOX 94651

City or town, state, and ZIP code
CLEVELAND, OH 44101

A Employer identification number
36-7515019

B Telephone number (see page 10 of the instructions)
(216) 257-4699

C If exemption application is pending, check here ▶ [X]
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: [X] Section 501(c)(3) exempt private foundation
[ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ $ 1,859,672.

J Accounting method: [X] Cash [ ] Accrual
[ ] Other (specify)
(Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))

	Line	Description	(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)	1,461,345.			
	2	Check ▶ [ ] if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	39,369.	39,369.		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	87,042.			
	b	Gross sales price for all assets on line 6a 1,078,509.				
	7	Capital gain net income (from Part IV, line 2)		87,042.		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	1,587,756.	126,411.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	10,454.	5,227.		5,227.
	14	Other employee salaries and wages		NONE	NONE	
	15	Pension plans, employee benefits		NONE	NONE	
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions) STMT 1	411.	411.		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings		NONE	NONE	
	22	Printing and publications		NONE	NONE	
	23	Other expenses (attach schedule) STMT 2	753.	3.		750.
	24	**Total operating and administrative expenses.** Add lines 13 through 23	11,618.	5,641.	NONE	5,977.
	25	Contributions, gifts, grants paid				
	26	Total expenses and disbursements Add lines 24 and 25	11,618.	5,641.	NONE	5,977.
	27	Subtract line 26 from line 12				
	a	Excess of revenue over expenses and disbursements	1,576,138.			
	b	**Net investment income** (if negative, enter -0-)		120,770.		
	c	**Adjusted net income** (if negative, enter -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			
	2	Savings and temporary cash investments		184,823.	184,823.
	3	Accounts receivable ▶			
		Less. allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less. allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less: allowance for doubtful accounts ▶ NONE			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10 a	Investments - U S and state government obligations (attach schedule)			
	b	Investments - corporate stock (attach schedule)		848,046.	1,033,341.
	c	Investments - corporate bonds (attach schedule)		620,143.	641,508.
	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)		1,653,012.	1,859,672.
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)			
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ X			
	27	Capital stock, trust principal, or current funds		1,653,012.	
	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)		1,653,012.	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)		1,653,012.	

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	
2	Enter amount from Part I, line 27a	2	1,576,138.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 3	3	78,199.
4	Add lines 1, 2, and 3	4	1,654,337.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 4	5	1,325.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,653,012.

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	SEE PART IV DETAIL			
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				
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss) . . . . . { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	87,042.
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 N/A

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? . . . . ☐ Yes ☐ No

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

1 Enter the appropriate amount in each column for each year; see page 18 of the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008			
2007			
2006			
2005			
2004			

2 **Total** of line 1, column (d)	2	
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	
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	
8 Enter qualifying distributions from Part XII, line 4	8	

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 . . . Date of ruling or determination letter ______________ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	2,415.
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	2,415.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	NONE
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	2,415.
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a		
b	Exempt foreign organizations-tax withheld at source — 6b: NONE		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 2,415.		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	2,415.
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be. **Credited to 2010 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶$ ________ (2) On foundation managers ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ STMT 5			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses* STMT 6	10	X	

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

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ PNC BANK NA Telephone no ▶ (216)257-4699

Located at ▶ P.O. BOX 94651, CLEVELAND, OH ZIP + 4 ▶ 44101-4651

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.

			Line	Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?		1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see page 20 of the instructions)		2b	X	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ____, ____, ____, ____				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)*		3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b		X

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

		Yes	No
5a	During the year did the foundation pay or incur any amount to:		
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes	☒ No
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes	☒ No
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes	☒ No
	(4) Provide a grant to an organization other than a charitable, etc, organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)	☐ Yes	☒ No
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes	☒ No
b	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	5b	
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes	☐ No
	If "Yes," attach the statement required by Regulations section 53 4945-5(d)		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes	☒ No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b	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?	7b	

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 7		10,454.	-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		NONE	NONE	NONE

Total number of other employees paid over $50,000 ▶ NONE

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		NONE

Total number of others receiving over $50,000 for professional services . . . . ▶ NONE

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 NONE	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions 3 NONE	
Total. Add lines 1 through 3 . . . . ▶	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,828,711.
b	Average of monthly cash balances	1b	NONE
c	Fair market value of all other assets (see page 24 of the instructions)	1c	NONE
d	**Total** (add lines 1a, b, and c)	1d	1,828,711.
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	NONE
3	Subtract line 2 from line 1d	3	1,828,711.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	27,431.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,801,280.
6	**Minimum investment return.** Enter 5% of line 5	6	90,064.

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	90,064.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2,415.		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	2,415.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	87,649.
4	Recoveries of amounts treated as qualifying distributions			4	NONE
5	Add lines 3 and 4			5	87,649.
6	Deduction from distributable amount (see page 25 of the instructions)			6	NONE
7	**Distributable amount** as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	87,649.

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	5,977.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	5,977.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	5,977.

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				87,649.
2	Undistributed income, if any, as of the end of 2009				
a	Enter amount for 2008 only			NONE	
b	Total for prior years 20____,20____,20____		NONE		
3	Excess distributions carryover, if any, to 2009:				
a	From 2004 . . . NONE				
b	From 2005 . . . NONE				
c	From 2006 . . . NONE				
d	From 2007 . . . NONE				
e	From 2008 . . . NONE				
f	**Total** of lines 3a through e	NONE			
4	Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 5,977.				
a	Applied to 2008, but not more than line 2a			NONE	
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)		NONE		
c	Treated as distributions out of corpus (Election required - see page 26 of the instructions)	NONE			
d	Applied to 2009 distributable amount				5,977.
e	Remaining amount distributed out of corpus	NONE			
5	Excess distributions carryover applied to 2009 (*If an amount appears in column (d), the same amount must be shown in column (a).*)	NONE			NONE
6	**Enter the net total of each column as indicated below:**				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	NONE			
b	Prior years' undistributed income. Subtract line 4b from line 2b		NONE		
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		NONE		
d	Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions		NONE		
e	Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions			NONE	
f	Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				81,672.
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)	NONE			
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	NONE			
9	**Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	NONE			
10	Analysis of line 9				
a	Excess from 2005 . . . NONE				
b	Excess from 2006 . . . NONE				
c	Excess from 2007 . . . NONE				
d	Excess from 2008 . . . NONE				
e	Excess from 2009 . . . NONE				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling . . . . ▶

b Check box to indicate whether the foundation is a private operating foundation described in section [ ] 4942(j)(3) or [ ] 4942(j)(5)

	Tax year	Prior 3 years			(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					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon a "Assets" alternative test - enter (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test-enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942 (j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

N/A

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/A

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

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

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

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

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

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

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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			14	39,369.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	87,042.	
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)				126,411.	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 126,411.

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 29 of the instructions.)
	NOT APPLICABLE

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received

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

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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

Signature of officer or trustee	Date: 09/30/2010	Title: TAX MANAGER

Paid Preparer's Use Only

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

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization	Employer identification number
LAWLER, ANNA CHARITABLE TRUST	36-7515019

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	[X] 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

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

Special Rules

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

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

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

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

Name of organization: LAWLER, ANNA CHARITABLE TRUST

Employer identification number: 36-7515019

Part I **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	ANNA LAWLER CRUT PO BOX 94651 CLEVELAND, OH 44101	$ 1,461,345.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization: LAWLER, ANNA CHARITABLE TRUST

Employer identification number: 36-7515019

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	STOCKS AND BONDS	$ 1,265,381.	04/03/2009
		$	
		$	
		$	
		$	
		$	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS					69.	
		1509.872 ASTON TAMRO SMALL CAP FUND CL I PROPERTY TYPE: SECURITIES					05/07/2008	05/08/2009
21,033.00		26,000.00					-4,967.00	
		5257.624 ALLEGIANT GOVT MORTGAGE FD CL I PROPERTY TYPE: SECURITIES					08/10/1994	05/08/2009
49,947.00		49,482.00					465.00	
		10319.917 ALLEGIANT BOND FUND CLASS I #4 PROPERTY TYPE: SECURITIES					08/10/1994	05/08/2009
100,103.00		104,240.00					-4,137.00	
		200. CELGENE CORP PROPERTY TYPE: SECURITIES					11/11/2008	05/08/2009
8,039.00		11,731.00					-3,692.00	
		935. ISHARES TR MSCI EMERGING MKTS INDEX PROPERTY TYPE: SECURITIES					07/07/2006	05/08/2009
29,237.00		29,610.00					-373.00	
		373. ISHARES TR MSCI EMERGING MKTS INDEX PROPERTY TYPE: SECURITIES					11/11/2008	05/08/2009
11,663.00		8,645.00					3,018.00	
		100. ISHARES NASDAQ BIOTECH INDEX ETF PROPERTY TYPE: SECURITIES					12/26/2007	05/08/2009
6,528.00		8,354.00					-1,826.00	
		393. ISHARES RUSSELL 2000 VALUE INDEX FU PROPERTY TYPE: SECURITIES					11/11/2008	05/08/2009
18,620.00		17,024.00					1,596.00	
		350. ISHARES RUSSELL 2000 GROWTH INDEX F PROPERTY TYPE: SECURITIES					11/11/2008	05/08/2009
18,935.00		16,703.00					2,232.00	
		450. ISHARES BARCLAYS 3-7 YEAR TREASURY PROPERTY TYPE: SECURITIES					09/24/2008	05/08/2009
50,450.00		48,981.00					1,469.00	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		150. LABORATORY CORP AMER HLDGS COM NEW PROPERTY TYPE: SECURITIES					05/07/2008	05/08/2009
9,736.00		11,510.00					-1,774.00	
		8116.777 MASTERS SELECT FD INTERNATIONAL PROPERTY TYPE: SECURITIES					03/13/2003	05/08/2009
86,119.00		75,080.00					11,039.00	
		200. NOKIA CORP SPONSORED ADR PROPERTY TYPE: SECURITIES					09/24/2008	05/08/2009
2,946.00		4,046.00					-1,100.00	
		600. NOKIA CORP SPONSORED ADR PROPERTY TYPE: SECURITIES					10/16/2003	05/08/2009
8,838.00		9,720.00					-882.00	
		250. NOVARTIS AG SPONSORED ADR PROPERTY TYPE: SECURITIES					11/11/2008	05/08/2009
9,477.00		12,258.00					-2,781.00	
		300. QUANTA SVCS INC PROPERTY TYPE: SECURITIES					03/13/2009	05/08/2009
6,963.00		6,473.00					490.00	
		1829.147 T ROWE PRICE MID-CAP GROWTH FUN PROPERTY TYPE: SECURITIES					03/13/2003	05/08/2009
69,581.00		60,059.00					9,522.00	
		2068.417 ROYCE TOTAL RETURN FUND INV FUN PROPERTY TYPE: SECURITIES					05/07/2008	05/08/2009
18,678.00		26,000.00					-7,322.00	
		440. WELLS FARGO & CO COM NEW PROPERTY TYPE: SECURITIES					03/10/2003	05/08/2009
10,582.00		9,806.00					776.00	
		500. FOSTER WHEELER AG SEDOL B4Y5TZ6 PROPERTY TYPE: SECURITIES					02/02/2007	05/08/2009
11,700.00		13,800.00					-2,100.00	
		50. AT&T INC PROPERTY TYPE: SECURITIES					11/11/2008	09/30/2009
1,344.00		1,363.00					-19.00	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		100. AT&T INC PROPERTY TYPE: SECURITIES					07/07/2006	09/30/2009
2,689.00		2,769.00					-80.00	
		150. ABBOTT LABS COM PROPERTY TYPE: SECURITIES					03/10/2003	09/30/2009
7,409.00		4,909.00					2,500.00	
		200. AMGEN INC CO COM PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
12,036.00		9,472.00					2,564.00	
		600. CVS CORPORATION (DEL) COM PROPERTY TYPE: SECURITIES					03/10/2003	09/30/2009
21,384.00		6,245.00					15,139.00	
		500. CISCO SYS INC COM PROPERTY TYPE: SECURITIES					07/07/2006	09/30/2009
11,750.00		9,775.00					1,975.00	
		300. CONOCOPHILLIPS PROPERTY TYPE: SECURITIES					03/10/2003	09/30/2009
13,518.00		7,662.00					5,856.00	
		50. CONOCOPHILLIPS PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
2,253.00		2,249.00					4.00	
		400. DEERE & CO COM PROPERTY TYPE: SECURITIES					07/07/2006	09/30/2009
17,105.00		17,100.00					5.00	
		300. EQT CORPORATION PROPERTY TYPE: SECURITIES					06/23/2004	09/30/2009
12,738.00		7,583.00					5,155.00	
		150. FIRSTENERGY CORP COM PROPERTY TYPE: SECURITIES					11/11/2008	09/30/2009
6,834.00		7,841.00					-1,007.00	
		150. FIRSTENERGY CORP COM PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
6,834.00		6,348.00					486.00	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		200. GENZYME CORP COM-GEN DIV PROPERTY TYPE: SECURITIES					06/20/2007	09/30/2009
11,308.00		13,210.00					-1,902.00	
		300. HEWLETT-PACKARD CO COM PROPERTY TYPE: SECURITIES					03/13/2009	09/30/2009
14,157.00		8,873.00					5,284.00	
		109. ISHARES RUSSELL MIDCAP INDEX FD ETF PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
8,507.00		7,093.00					1,414.00	
		100. J P MORGAN CHASE & CO COM PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
4,370.00		3,678.00					692.00	
		280. JACOBS ENGINEERING GROUP INC PROPERTY TYPE: SECURITIES					03/10/2003	09/30/2009
12,839.00		5,317.00					7,522.00	
		150. LOCKHEED MARTIN CORP COM PROPERTY TYPE: SECURITIES					11/11/2008	09/30/2009
11,698.00		11,215.00					483.00	
		100. LOCKHEED MARTIN CORP COM PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
7,798.00		8,059.00					-261.00	
		300. MARATHON OIL CORP COM PROPERTY TYPE: SECURITIES					03/13/2009	09/30/2009
9,546.00		6,932.00					2,614.00	
		200. MARATHON OIL CORP COM PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
6,364.00		6,336.00					28.00	
		150. MEDCO HEALTH SOLUTIONS INC PROPERTY TYPE: SECURITIES					12/26/2007	09/30/2009
8,278.00		7,631.00					647.00	
		400. MICROSOFT CORP COM PROPERTY TYPE: SECURITIES					03/10/2003	09/30/2009
10,288.00		9,924.00					364.00	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		150. NATIONAL OILWELL VARCO INC					03/13/2009	09/30/2009
		PROPERTY TYPE: SECURITIES						
6,462.00		4,284.00					2,178.00	
		150. NATIONAL OILWELL VARCO INC					05/08/2009	09/30/2009
		PROPERTY TYPE: SECURITIES						
6,462.00		5,228.00					1,234.00	
		200. NIKE INC COM CLASS B					11/11/2008	09/30/2009
		PROPERTY TYPE: SECURITIES						
12,898.00		9,129.00					3,769.00	
		150. NIKE INC COM CLASS B					05/08/2009	09/30/2009
		PROPERTY TYPE: SECURITIES						
9,673.00		8,076.00					1,597.00	
		300. PFIZER INC COM					05/08/2009	09/30/2009
		PROPERTY TYPE: SECURITIES						
4,950.00		4,332.00					618.00	
		350. PHILIP MORRIS INTERNAT-W/I					05/07/2008	09/30/2009
		PROPERTY TYPE: SECURITIES						
17,004.00		17,813.00					-809.00	
		100. PHILIP MORRIS INTERNAT-W/I					05/08/2009	09/30/2009
		PROPERTY TYPE: SECURITIES						
4,858.00		4,141.00					717.00	
		50. PROCTER & GAMBLE CO COM					05/08/2009	09/30/2009
		PROPERTY TYPE: SECURITIES						
2,888.00		2,601.00					287.00	
		100. QUALCOMM INC COM					10/16/2003	09/30/2009
		PROPERTY TYPE: SECURITIES						
4,488.00		2,184.00					2,304.00	
		100. QUALCOMM INC COM					05/08/2009	09/30/2009
		PROPERTY TYPE: SECURITIES						
4,488.00		4,276.00					212.00	
		100. SCHLUMBERGER LTD COM					05/08/2009	09/30/2009
		PROPERTY TYPE: SECURITIES						
5,946.00		5,523.00					423.00	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		310. MATERIALS SELECT SECTOR SPDR ETF LA PROPERTY TYPE: SECURITIES					05/07/2008	09/30/2009
9,570.00		11,899.00					-2,329.00	
		381. MATERIALS SELECT SECTOR SPDR ETF LA PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
11,762.00		10,150.00					1,612.00	
		1190. INDUSTRIAL SELECT SECTOR SPDR ETF PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
31,334.00		27,465.00					3,869.00	
		450. STAPLES INC COM PROPERTY TYPE: SECURITIES					09/24/2008	09/30/2009
10,405.00		10,164.00					241.00	
		70. STATE STR CORP COM PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
3,663.00		2,828.00					835.00	
		200. TEVA PHARMACEUTICAL INDS LTD ADR PROPERTY TYPE: SECURITIES					03/13/2009	09/30/2009
10,085.00		8,988.00					1,097.00	
		150. TEVA PHARMACEUTICAL INDS LTD ADR PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
7,564.00		6,676.00					888.00	
		200. THE TRAVELERS COS INC PROPERTY TYPE: SECURITIES					03/13/2009	09/30/2009
9,828.00		7,434.00					2,394.00	
		300. THE TRAVELERS COS INC PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
14,742.00		11,499.00					3,243.00	
		300. VERIZON COMMUNICATIONS COM PROPERTY TYPE: SECURITIES					03/13/2009	09/30/2009
9,045.00		8,426.00					619.00	
		100. VERIZON COMMUNICATIONS COM PROPERTY TYPE: SECURITIES					05/08/2009	09/30/2009
3,015.00		3,020.00					-5.00	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		340. ACE LIMITED ISIN CH0044328745 SEDOL PROPERTY TYPE: SECURITIES					03/10/2003	09/30/2009
18,118.00		9,712.00					8,406.00	
		60000. GENL ELEC CAP CORP 5.25% 10/27 PROPERTY TYPE: SECURITIES					06/20/2007	10/27/2009
60,000.00		59,891.00					109.00	
		50. AT&T INC PROPERTY TYPE: SECURITIES					11/11/2008	11/18/2009
1,311.00		1,363.00					-52.00	
		30. AMERICAN TOWER CORP CL A PROPERTY TYPE: SECURITIES					09/30/2009	11/18/2009
1,229.00		1,089.00					140.00	
		50. BAXTER INTERNATIONAL INC COM PROPERTY TYPE: SECURITIES					03/13/2009	11/18/2009
2,752.00		2,522.00					230.00	
		50. DOMINION RES INC VA NEW COM PROPERTY TYPE: SECURITIES					06/23/2004	11/18/2009
1,853.00		1,592.00					261.00	
		50. MCDONALD'S CORP COM PROPERTY TYPE: SECURITIES					05/08/2009	11/18/2009
3,181.00		2,755.00					426.00	
		50. MEDCO HEALTH SOLUTIONS INC PROPERTY TYPE: SECURITIES					12/26/2007	11/18/2009
3,093.00		2,544.00					549.00	
		150. ORACLE CORPORATION PROPERTY TYPE: SECURITIES					05/08/2009	11/18/2009
3,395.00		2,802.00					593.00	
		50. PEPSICO INC COM PROPERTY TYPE: SECURITIES					06/21/2005	11/18/2009
3,118.00		2,800.00					318.00	
		50. SCHLUMBERGER LTD COM PROPERTY TYPE: SECURITIES					05/08/2009	11/18/2009
3,354.00		2,762.00					592.00	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		50. TARGET CORP PROPERTY TYPE: SECURITIES					03/13/2009	11/18/2009
2,398.00		1,474.00					924.00	
		50. UNION PACIFIC CORP COM PROPERTY TYPE: SECURITIES					09/30/2009	11/18/2009
3,286.00		2,919.00					367.00	
TOTAL GAIN(LOSS)							87,042.	

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAXES	82.	82.
FOREIGN TAXES ON QUALIFIED FOR	312.	312.
FOREIGN TAXES ON NONQUALIFIED	17.	17.
TOTALS	411.	411.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
MISC FOUNDATION EXPENSES	750.		750.
ADR SERVICE FEES	3.	3.	
TOTALS	753.	3.	750.

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION		AMOUNT
ROUNDING ADJUSTMENT		1.
ADJUSTMENT OF CONTRIBUTIONS FMV TO COST		78,198.
	TOTAL	78,199.

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION	AMOUNT
ITEMS POSTED IN SUBSEQUENT YEAR FOR CURR	1,325.
TOTAL	1,325.

STATE(S) WHERE THE FOUNDATION IS REGISTERED

PA

FORM 990PF, PART VII-A - NEW SUBSTANTIAL CONTRIBUTORS

NAME AND ADDRESS

ANNA LAWLER CRUT
PO BOX 94651
CLEVELAND, OH 44101

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

OFFICER NAME:
PNC BANK NA
ADDRESS:
P.O. BOX 94651
CLEVELAND, OH 44101-4651
TITLE:
TRUSTEE
AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 2
COMPENSATION .... 10,454.

TOTAL COMPENSATION: 10,454.

LAWLER, ANNA CHARITABLE TRUST 36-7515019

Schedule D Detail of Short-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT	PURPOSES				
200. CELGENE CORP	11/11/2008	05/08/2009	8,039.00	11,731.00	-3,692.00
373. ISHARES TR MSCI					
EMERGING MKTS INDEX FD	11/11/2008	05/08/2009	11,663.00	8,645.00	3,018.00
393. ISHARES RUSSELL 2000					
VALUE INDEX FUND	11/11/2008	05/08/2009	18,620.00	17,024.00	1,596.00
350. ISHARES RUSSELL 2000					
GROWTH INDEX FUND	11/11/2008	05/08/2009	18,935.00	16,703.00	2,232.00
450. ISHARES BARCLAYS 3-7					
YEAR TREASURY BOND FUND	09/24/2008	05/08/2009	50,450.00	48,981.00	1,469.00
200. NOKIA CORP SPONSORED	09/24/2008	05/08/2009	2,946.00	4,046.00	-1,100.00
250. NOVARTIS AG SPONSORED	11/11/2008	05/08/2009	9,477.00	12,258.00	-2,781.00
300. QUANTA SVCS INC	03/13/2009	05/08/2009	6,963.00	6,473.00	490.00
50. AT&T INC	11/11/2008	09/30/2009	1,344.00	1,363.00	-19.00
200. AMGEN INC CO COM	05/08/2009	09/30/2009	12,036.00	9,472.00	2,564.00
50. CONOCOPHILLIPS	05/08/2009	09/30/2009	2,253.00	2,249.00	4.00
150. FIRSTENERGY CORP COM	11/11/2008	09/30/2009	6,834.00	7,841.00	-1,007.00
150. FIRSTENERGY CORP COM	05/08/2009	09/30/2009	6,834.00	6,348.00	486.00
300. HEWLETT-PACKARD CO	03/13/2009	09/30/2009	14,157.00	8,873.00	5,284.00
109. ISHARES RUSSELL	05/08/2009	09/30/2009	8,507.00	7,093.00	1,414.00
100. J P MORGAN CHASE & CO	05/08/2009	09/30/2009	4,370.00	3,678.00	692.00
150. LOCKHEED MARTIN CORP	11/11/2008	09/30/2009	11,698.00	11,215.00	483.00
100. LOCKHEED MARTIN CORP	05/08/2009	09/30/2009	7,798.00	8,059.00	-261.00
300. MARATHON OIL CORP COM	03/13/2009	09/30/2009	9,546.00	6,932.00	2,614.00
200. MARATHON OIL CORP COM	05/08/2009	09/30/2009	6,364.00	6,336.00	28.00
150. NATIONAL OILWELL	03/13/2009	09/30/2009	6,462.00	4,284.00	2,178.00
150. NATIONAL OILWELL	05/08/2009	09/30/2009	6,462.00	5,228.00	1,234.00
200. NIKE INC COM CLASS B	11/11/2008	09/30/2009	12,898.00	9,129.00	3,769.00
150. NIKE INC COM CLASS B	05/08/2009	09/30/2009	9,673.00	8,076.00	1,597.00
300. PFIZER INC COM	05/08/2009	09/30/2009	4,950.00	4,332.00	618.00
100. PHILIP MORRIS	05/08/2009	09/30/2009	4,858.00	4,141.00	717.00
50. PROCTER & GAMBLE CO	05/08/2009	09/30/2009	2,888.00	2,601.00	287.00
100. QUALCOMM INC COM	05/08/2009	09/30/2009	4,488.00	4,276.00	212.00
Totals					

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LAWLER, ANNA CHARITABLE TRUST 36-7515019

Schedule D Detail of Short-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
100. SCHLUMBERGER LTD COM	05/08/2009	09/30/2009	5,946.00	5,523.00	423.00
381. MATERIALS SELECT					
SECTOR SPDR ETF LARGE CAP	05/08/2009	09/30/2009	11,762.00	10,150.00	1,612.00
1190. INDUSTRIAL SELECT					
SECTOR SPDR ETF LARGE CAP	05/08/2009	09/30/2009	31,334.00	27,465.00	3,869.00
70. STATE STR CORP COM	05/08/2009	09/30/2009	3,663.00	2,828.00	835.00
200. TEVA PHARMACEUTICAL	03/13/2009	09/30/2009	10,085.00	8,988.00	1,097.00
150. TEVA PHARMACEUTICAL	05/08/2009	09/30/2009	7,564.00	6,676.00	888.00
200. THE TRAVELERS COS INC	03/13/2009	09/30/2009	9,828.00	7,434.00	2,394.00
300. THE TRAVELERS COS INC	05/08/2009	09/30/2009	14,742.00	11,499.00	3,243.00
300. VERIZON COMMUNICATION	03/13/2009	09/30/2009	9,045.00	8,426.00	619.00
100. VERIZON COMMUNICATION	05/08/2009	09/30/2009	3,015.00	3,020.00	-5.00
30. AMERICAN TOWER CORP CL	09/30/2009	11/18/2009	1,229.00	1,089.00	140.00
50. BAXTER INTERNATIONAL	03/13/2009	11/18/2009	2,752.00	2,522.00	230.00
50. MCDONALD'S CORP COM	05/08/2009	11/18/2009	3,181.00	2,755.00	426.00
150. ORACLE CORPORATION	05/08/2009	11/18/2009	3,395.00	2,802.00	593.00
50. SCHLUMBERGER LTD COM	05/08/2009	11/18/2009	3,354.00	2,762.00	592.00
50. TARGET CORP	03/13/2009	11/18/2009	2,398.00	1,474.00	924.00
50. UNION PACIFIC CORP COM	09/30/2009	11/18/2009	3,286.00	2,919.00	367.00
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES			398,092.00	355,719.00	42,373.00
Totals			398,092.00	355,719.00	42,373.00

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LAWLER, ANNA CHARITABLE TRUST 36-7515019

Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT	PURPOSES				
1509.872 ASTON TAMRO SMALL	05/07/2008	05/08/2009	21,033.00	26,000.00	-4,967.00
5257.624 ALLEGIANT GOVT	08/10/1994	05/08/2009	49,947.00	49,482.00	465.00
10319.917 ALLEGIANT BOND					
FUND CLASS I #403	08/10/1994	05/08/2009	100,103.00	104,240.00	-4,137.00
935. ISHARES TR MSCI					
EMERGING MKTS INDEX FD	07/07/2006	05/08/2009	29,237.00	29,610.00	-373.00
100. ISHARES NASDAQ	12/26/2007	05/08/2009	6,528.00	8,354.00	-1,826.00
150. LABORATORY CORP AMER	05/07/2008	05/08/2009	9,736.00	11,510.00	-1,774.00
8116.777 MASTERS SELECT FD					
INTERNATIONAL FD	03/13/2003	05/08/2009	86,119.00	75,080.00	11,039.00
600. NOKIA CORP SPONSORED	10/16/2003	05/08/2009	8,838.00	9,720.00	-882.00
1829.147 T ROWE PRICE	03/13/2003	05/08/2009	69,581.00	60,059.00	9,522.00
2068.417 ROYCE TOTAL					
RETURN FUND INV FUND 267	05/07/2008	05/08/2009	18,678.00	26,000.00	-7,322.00
440. WELLS FARGO & CO COM	03/10/2003	05/08/2009	10,582.00	9,806.00	776.00
500. FOSTER WHEELER AG	02/02/2007	05/08/2009	11,700.00	13,800.00	-2,100.00
100. AT&T INC	07/07/2006	09/30/2009	2,689.00	2,769.00	-80.00
150. ABBOTT LABS COM	03/10/2003	09/30/2009	7,409.00	4,909.00	2,500.00
600. CVS CORPORATION (DEL)	03/10/2003	09/30/2009	21,384.00	6,245.00	15,139.00
500. CISCO SYS INC COM	07/07/2006	09/30/2009	11,750.00	9,775.00	1,975.00
300. CONOCOPHILLIPS	03/10/2003	09/30/2009	13,518.00	7,662.00	5,856.00
400. DEERE & CO COM	07/07/2006	09/30/2009	17,105.00	17,100.00	5.00
300. EQT CORPORATION	06/23/2004	09/30/2009	12,738.00	7,583.00	5,155.00
200. GENZYME CORP COM-GEN	06/20/2007	09/30/2009	11,308.00	13,210.00	-1,902.00
280. JACOBS ENGINEERING	03/10/2003	09/30/2009	12,839.00	5,317.00	7,522.00
150. MEDCO HEALTH	12/26/2007	09/30/2009	8,278.00	7,631.00	647.00
400. MICROSOFT CORP COM	03/10/2003	09/30/2009	10,288.00	9,924.00	364.00
350. PHILIP MORRIS	05/07/2008	09/30/2009	17,004.00	17,813.00	-809.00
100. QUALCOMM INC COM	10/16/2003	09/30/2009	4,488.00	2,184.00	2,304.00
310. MATERIALS SELECT					
SECTOR SPDR ETF LARGE CAP	05/07/2008	09/30/2009	9,570.00	11,899.00	-2,329.00
450. STAPLES INC COM	09/24/2008	09/30/2009	10,405.00	10,164.00	241.00
Totals					

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LAWLER, ANNA CHARITABLE TRUST 36-7515019

Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
340. ACE LIMITED ISIN					
CH0044328745 SEDOL B3BQMF6	03/10/2003	09/30/2009	18,118.00	9,712.00	8,406.00
60000. GENL ELEC CAP CORP					
5.25% 10/27/09	06/20/2007	10/27/2009	60,000.00	59,891.00	109.00
50. AT&T INC	11/11/2008	11/18/2009	1,311.00	1,363.00	-52.00
50. DOMINION RES INC VA	06/23/2004	11/18/2009	1,853.00	1,592.00	261.00
50. MEDCO HEALTH SOLUTIONS	12/26/2007	11/18/2009	3,093.00	2,544.00	549.00
50. PEPSICO INC COM	06/21/2005	11/18/2009	3,118.00	2,800.00	318.00
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES			680,348.00	635,748.00	44,600.00
Totals			680,348.00	635,748.00	44,600.00

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FEDERAL CAPITAL GAIN DIVIDENDS
==============================

LONG-TERM CAPITAL GAIN DIVIDENDS

15% RATE CAPITAL GAIN DIVIDENDS

TOTAL 15% RATE CAPITAL GAIN DIVIDENDS	69.00
TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS	69.00

ACCOUNT STATEMENT

LAWLER, ANNA CHARITABLE TRUST

Statement Period 10/01/2009 through 12/31/2009
Account Number 46 00-0184-94-0

STATEMENT OF INVESTMENT POSITION

Acq Date Range	Quantity	Tax Cost	Market Value	Ticker Price	Unrealized Gain/Loss	% of Asset Category	% of Account	Projected Annual Income	Yield
EQUITIES									
DOMESTIC COMMON EQUITY									
ABBOTT LABS COM 03/03 - 03/03				ABT					
	150 000	$4,909 35	$8,098 50	$53 99	$3,189 15	0 78%	0 44%	$240	2.96%
AMERICAN TOWER CORP CL A 09/09 - 09/09				AMT					
	170 000	$6,171 00	$7,345 70	$43.21	$1,174.70	0 71%	0 39%		
AMGEN INC COM 05/09 - 05/09				AMGN					
	100 000	$4,736 00	$5,657 00	$56.57	$921 00	0 55%	0 30%		
APACHE CORP COM 09/08 - 09/09				APA					
	150 000	$14,021 00	$15,475 50	$103 17	$1,454 50	1 50%	0 83%	$90	0 58%
APPLE INC 09/09 - 09/09				AAPL					
	50 000	$9,255 50	$10,536 60	$210 73	$1,281.10	1 02%	0 57%		
AT & T INC COM 06/05 - 05/09				T					
	400 000	$9,907 00	$11,212 00	$28 03	$1,305 00	1 09%	0 60%	$672	5 99%
BAXTER INTL INC COM 03/09 - 05/09				BAX					
	250 000	$12,549 00	$14,670 00	$58 68	$2,121 00	1 42%	0 79%	$290	1 98%
BRISTOL MYERS SQUIBB CO COM 09/09 - 09/09				BMY					
	250 000	$5,634 53	$6,312 50	$25 25	$677 97	0 61%	0 34%	$320	5 07%
BROADCOM CORP CL A 09/09 - 09/09				BRCM					
	250 000	$7,667 50	$7,867 50	$31 47	$200 00	0 76%	0 42%		
CELANESE CORP DEL COM SER A 09/09 - 09/09				CE					
	250 000	$6,274 45	$8,025 00	$32 10	$1,750 55	0 78%	0 43%	$40	0 50%

PRIVATE CLIENT GROUP

NATIONAL CITY BANK
248 SENECA STREET
OIL CITY, PA 16301
NationalCity com/PrivateClientGroup

ACCOUNT STATEMENT

LAWLER, ANNA CHARITABLE TRUST

Statement Period 10/01/2009 through 12/31/2009
Account Number 46 00-0184-94-0

STATEMENT OF INVESTMENT POSITION CONTINUED

Acq. Date Range	Quantity	Tax Cost	Market Value	Ticker Price	Unrealized Gain/Loss	% of Asset Category	% of Account	Projected Annual Income	Yield
CHUBB CORP COM				CB					
09/09 - 09/09									
	150 000	$7,592 55	$7,377 00	$49.18	-$215 55	0 71%	0 40%	$210	2 85%
CISCO SYS INC COM				CSCO					
07/06 - 05/09									
	500 000	$9,586 24	$11,970 00	$23 94	$2,383 76	1 16%	0 64%		
COLGATE-PALMOLIVE CO COM				CL					
09/09 - 09/09									
	100 000	$7,628 85	$8,215 00	$82 15	$586 15	0 79%	0 44%	$176	2 14%
CSX CORP COM				CSX					
09/09 - 09/09									
	200 000	$8,364 00	$9,698 00	$48 49	$1,334 00	0 94%	0 52%	$176	1 81%
DOMINION RES INC VA NEW COM				D					
03/03 - 06/04									
	250 000	$7,083 40	$9,730 00	$38 92	$2,646 60	0 94%	0 52%	$438	4 50%
E M C CORP MASS COM				EMC					
09/09 - 09/09									
	400 000	$6,831 24	$6,988 00	$17.47	$156 76	0 68%	0 38%		
EBAY INC COM				EBAY					
09/09 - 09/09									
	300 000	$7,067 55	$7,059 00	$23 53	-$8 55	0 68%	0 38%		
EXXON MOBIL CORP COM				XOM					
09/09 - 09/09									
	200 000	$13,725 70	$13,638 00	$68 19	-$87 70	1 32%	0 73%	$336	2 46%
FEDEX CORP COM				FDX					
09/09 - 09/09									
	100 000	$7,501 00	$8,345 00	$83 45	$844 00	0 81%	0 45%	$44	0 53%
FRANKLIN RES INC COM				BEN					
09/09 - 09/09									
	70 000	$7,037 80	$7,374 50	$105 35	$336 70	0 71%	0 40%	$62	0 83%
FREEPORT-MCMORAN COPPER & GOLD INC CL B				FCX					
09/09 - 09/09									
	110 000	$7,548 20	$8,831 90	$80 29	$1,283 70	0 85%	0 47%	$66	0 75%

STATEMENT OF INVESTMENT POSITION CONTINUED

Acq. Date Range	Quantity	Tax Cost	Market Value	Ticker Price	Unrealized Gain/Loss	% of Asset Category	% of Account	Projected Annual Income	Yield
GENERAL MILLS INC COM 09/09 - 09/09				GIS					
	100 000	$6,418 00	$7,081 00	$70 81	$663 00	0 69%	0 38%	$196	2 77%
GOLDMAN SACHS GROUP INC COM 09/09 - 09/09				GS					
	100 000	$18,363 40	$16,884 00	$168 84	-$1,479 40	1 63%	0 91%	$140	0 83%
GOOGLE INC CL A 09/08 - 05/09				GOOG					
	40 000	$17,152 40	$24,799 20	$619 98	$7,646 80	2 40%	1 33%		
GRAINGER W W INC COM 09/09 - 09/09				GWW					
	80 000	$7,136 80	$7,746 40	$96 83	$609 60	0 75%	0 42%	$147	1 90%
HOME DEPOT INC COM 09/08 - 09/08				HD					
	400 000	$10,019 00	$11,572 00	$28 93	$1,553 00	1 12%	0 62%	$360	3 11%
INTEL CORP COM 09/08 - 05/09				INTC					
	1,000 000	$18,034 33	$20,400 00	$20 40	$2,365 67	1 97%	1 10%	$560	2 74%
INTERNATIONAL BUSINESS MACHS CORP COM 09/09 - 09/09				IBM					
	100 000	$11,955 70	$13,090 00	$130 90	$1,134 30	1 27%	0 70%	$220	1 68%
INTERNATIONAL PAPER CO COM 09/09 - 09/09				IP					
	300 000	$6,674 55	$8,034 00	$26 78	$1,359 45	0 78%	0 43%	$30	0 37%
ITT INDUSTRIES INC COM 09/09 - 09/09				ITT					
	150 000	$7,817 55	$7,461 00	$49 74	-$356 55	0 72%	0 40%	$128	1 71%
JOHNSON & JOHNSON COM 09/09 - 09/09				JNJ					
	250 000	$15,216 75	$16,102 50	$64 41	$885 75	1 56%	0 87%	$490	3 04%
JOHNSON CTLS INC COM 09/09 - 09/09				JCI					
	420 000	$10,747 80	$11,440 80	$27 24	$693 00	1 11%	0.62%	$218	1 91%

PRIVATE CLIENT GROUP

NATIONAL CITY BANK
248 SENECA STREET
OIL CITY, PA 16301
NationalCity com/PnvateClientGroup

ACCOUNT STATEMENT

LAWLER, ANNA CHARITABLE TRUST

Statement Period 10/01/2009 through 12/31/2009
Account Number 46 00-0184-94-0

STATEMENT OF INVESTMENT POSITION CONTINUED

Acq. Date Range	Quantity	Tax Cost	Market Value	Ticker Price	Unrealized Gain/Loss	% of Asset Category	% of Account	Projected Annual Income	Yield
JPMORGAN CHASE & CO COM				JPM					
06/05 - 05/09	500 000	$18,119 00	$20,835 00	$41 67	$2,716 00	2 02%	1 12%	$100	0 48%
LUBRIZOL CORP COM				LZ					
09/09 - 09/09	100 000	$7,147 06	$7,295 00	$72 95	$147 94	0 71%	0 39%	$124	1 70%
MCDONALDS CORP COM				MCD					
03/09 - 05/09	300 000	$16,090 13	$18,732 00	$62.44	$2,641 87	1 81%	1 01%	$660	3 52%
MCKESSON CORP COM (N/C FROM MCKESSON HBOC INC)				MCK					
09/09 - 09/09	130 000	$7,720 51	$8,125 00	$62 50	$404 49	0 79%	0 44%	$62	0 77%
MEDCO HEALTH SOLUTIONS INC COM				MHS					
05/09 - 05/09	200 000	$9,168 00	$12,782.00	$63 91	$3,614 00	1 24%	0 69%		
METLIFE INC COM				MET					
09/09 - 09/09	150 000	$5,728 28	$5,302 50	$35 35	-$425 78	0 51%	0 29%	$111	2 09%
MICROSOFT CORP COM				MSFT					
03/03 - 05/09	750 000	$15,010 00	$22,860 00	$30 48	$7,850 00	2 21%	1 23%	$390	1 71%
OCCIDENTAL PETE CORP COM				OXY					
07/03 - 07/03	350 000	$5,969 25	$28,472 50	$81 35	$22,503 25	2 76%	1 53%	$462	1 62%
ORACLE CORP COM				ORCL					
03/03 - 05/09	1,050 000	$11,960 86	$25,756 50	$24 53	$13,795 64	2 49%	1 39%	$210	0 81%
OWENS ILLINOIS INC COM				OI					
09/09 - 09/09	180 000	$6,612 93	$5,916 60	$32 87	-$696 33	0 57%	0 32%		

STATEMENT OF INVESTMENT POSITION CONTINUED

Acq. Date Range	Quantity	Tax Cost	Market Value	Ticker Price	Unrealized Gain/Loss	% of Asset Category	% of Account	Projected Annual Income	Yield
PEPSICO INC COM 03/03 - 05/09				PEP					
	350 000	$14,738 05	$21,280 00	$60 80	$6,541 95	2 06%	1 14%	$630	2 96%
PFIZER INC COM 05/09 - 05/09				PFE					
	700 000	$10,108 00	$12,733 00	$18 19	$2,625 00	1 23%	0 68%	$504	3 96%
PRICE T ROWE GROUP INC COM 09/09 - 09/09				TROW					
	150 000	$6,842 55	$7,987 50	$53 25	$1,144 95	0 77%	0 43%	$150	1 88%
PROCTER & GAMBLE CO COM 07/03 - 05/09				PG					
	300 000	$14,223 53	$18,189 00	$60 63	$3,965 47	1 76%	0 98%	$528	2 90%
QUALCOMM INC COM 03/03 - 10/03				QCOM					
	300 000	$5,375 00	$13,878 00	$46 26	$8,503 00	1 34%	0.75%	$204	1 47%
ROCKWELL AUTOMATION INC COM NEW (N/C FROM ROCKWELL INTL CORP COM) 09/09 - 09/09				ROK					
	170 000	$7,241 49	$7,986 60	$46 98	$745 11	0 77%	0 43%	$197	2 47%
SCHLUMBERGER LTD COM 11/08 - 03/09				SLB					
	200 000	$8,765 60	$13,018 00	$65 09	$4,252 40	1 26%	0 70%	$168	1 29%
STATE STR CORP COM 05/09 - 05/09				STT					
	280 000	$11,312 00	$12,191 20	$43 54	$879 20	1 18%	0 66%	$11	0 09%
TARGET CORP COM 03/09 - 03/09				TGT					
	200 000	$5,897 60	$9,674 00	$48 37	$3,776 40	0 94%	0 52%	$136	1 41%
UNION PAC CORP CO COM 09/09 - 09/09				UNP					
	70 000	$4,086 60	$4,473 00	$63 90	$386 40	0 43%	0 24%	$76	1 69%

ACCOUNT STATEMENT

STATEMENT OF INVESTMENT POSITION CONTINUED

Acq. Date Range	Quantity	Tax Cost	Market Value	Ticker Price	Unrealized Gain/Loss	% of Asset Category	% of Account	Projected Annual Income	Yield
UNITED TECHNOLOGIES CORP COM				UTX					
09/09 - 09/09									
	170 000	$10,374 85	$11,799 70	$69 41	$1,424 85	1 14%	0 63%	$262	2 22%
VIACOM INC NEW CL B				VIA/B					
09/09 - 09/09									
	280 000	$7,854 00	$8,324 40	$29 73	$470 40	0 81%	0 45%		
WAL MART STORES INC COM				WMT					
05/08 - 05/09									
	400 000	$22,718 50	$21,380 00	$53 45	-$1,338 50	2 07%	1 15%	$436	2 04%
WELLS FARGO & CO NEW COM				WFC					
09/09 - 09/09									
	500 000	$14,064 25	$13,495 00	$26 99	-$569 25	1 31%	0 73%	$100	0 74%
WISCONSIN ENERGY CORP COM				WEC					
09/09 - 09/09									
	130 000	$5,866 60	$6,477 90	$49 83	$611 30	0 63%	0 35%	$176	2 71%
XTO ENERGY INC				XTO					
09/09 - 09/09									
	300 000	$12,371 43	$13,959 00	$46 53	$1,587 57	1 35%	0 75%	$150	1 07%
3M COMPANY COM				MMM					
09/09 - 09/09									
	150 000	$11,049 95	$12,400 50	$82 67	$1,350 55	1 20%	0 67%	$306	2 47%
TOTAL DOMESTIC COMMON EQUITY		**$577,044.16**	**$704,361.50**		**$127,317.34**	**68.16%**	**37.87%**	**$11,802**	**1.68%**
DOMESTIC MUTUAL FUNDS									
ISHARES TR RUSSELL MIDCAP				IWR					
05/09 - 05/09									
	1,016 000	$66,111 12	$83,830 16	$82 51	$17,719 04	8 11%	4 51%	$1,656	1 98%
ISHARES TR RUSSELL 2000 GROWTH				IWO					
03/09 - 11/09									
	316 000	$15,605 55	$21,510 12	$68 07	$5,904 57	2 08%	1 16%	$180	0 84%
ISHARES TR RUSSELL 2000 VALUE INDEX				IWN					
03/09 - 11/09									
	364 000	$15,383 19	$21,126 56	$58 04	$5,743 37	2 04%	1 14%	$549	2 60%
TOTAL DOMESTIC MUTUAL FUNDS		**$97,099.86**	**$126,466.84**		**$29,366.98**	**12.24%**	**6.80%**	**$2,385**	**1.89%**

STATEMENT OF INVESTMENT POSITION CONTINUED

Acq. Date Range	Quantity	Tax Cost	Market Value	Ticker Price	Unrealized Gain/Loss	% of Asset Category	% of Account	Projected Annual Income	Yield
INTERNATIONAL MARKETS									
ISHARES TR MSCI EAFE IDX				EFA					
05/09 - 09/09									
	2,898 000	$143,105 19	$160,201 44	$55 28	$17,096 25	15 50%	8 61%	$4,176	2 61%
ISHARES TR MSCI EMERG MKT				EEM					
11/08 - 11/08									
	572 000	$13,257 82	$23,738 00	$41 50	$10,480 18	2 30%	1 28%	$14	0 06%
VANGUARD INTL EQUITY INDEX FD INC EMERGING MARKETS ETF				VWO					
09/09 - 09/09									
	453 000	$17,539 03	$18,573 00	$41 00	$1,033 97	1 80%	1 00%	$247	1 33%
TOTAL INTERNATIONAL MARKETS		**$173,902.04**	**$202,512.44**		**$28,610.40**	**19.60%**	**10.89%**	**$4,437**	**2.19%**
TOTAL EQUITIES		**$848,046.06**	**$1,033,340.78**		**$185,294.72**	**100.00%**	**55.56%**	**$18,624**	**1.80%**
FIXED INCOME									
TAXABLE FIXED INCOME									
TAXABLE FIXED INCOME SECURITIES									
DEERE JOHN CAP CORP MEDIUM TERM NTS-BOOK ENTRY TRANCHE # TR 00340 DTD 10/17/06 5 400% DUE 10/17/11									
06/07 - 06/07									
	60,000 000	$59,581 20	$64,114 20	$106 86	$4,533 00	9 99%	3 45%	$3,240	5 05%
TAXABLE FUNDS									
ALLEGIANT BOND FUND CLASS I #403				AIGIX					
08/94 - 07/01									
	13,314 442	$131,535 17	$134,475 86	$10 10	$2,940 69	20 96%	7 23%	$5,858	4 36%
ALLEGIANT GOVERNMENT MORTGAGE FUND CLASS I #406				AUSIX					
08/94 - 01/00									
	11,471 416	$105,089 06	$109,437 31	$9 54	$4,348 25	17 06%	5 88%	$5,070	4 63%
DODGE & COX INCOME FD #147				DODIX					
10/09 - 11/09									
	8,686 181	$113,000 00	$112,572 91	$12 96	-$427 09	17 55%	6 05%	$5,881	5 22%
ISHARES IBOXX $ INVESTMENT GRADE CORP BOND FD				LQD					
05/09 - 05/09									
	1,042 000	$100,584 26	$108,524 30	$104 15	$7,940 04	16 92%	5 84%	$5,965	5 50%

LAWLER, ANNA CHARITABLE TRUST

Statement Period 10/01/2009 through 12/31/2009
Account Number 46 00-0184-94-0

STATEMENT OF INVESTMENT POSITION CONTINUED

Acq. Date Range	Quantity	Tax Cost	Market Value	Ticker Price	Unrealized Gain/Loss	% of Asset Category	% of Account	Projected Annual Income	Yield
VANGUARD BD INDEX FD INC TOTAL BD MARKET ETF				BND					
05/09 - 05/09	1,430.000	$110,353 10	$112,383 70	$78 59	$2,030 60	17 52%	6 04%	$4,379	3 90%
TOTAL TAXABLE FUNDS		**$560,561.59**	**$577,394.08**		**$16,832.49**	**90.01%**	**31.05%**	**$27,153**	**4.70%**
TOTAL TAXABLE FIXED INCOME		**$620,142.79**	**$641,508.28**		**$21,365.49**	**100.00%**	**34.50%**	**$30,393**	**4.74%**
TOTAL FIXED INCOME		**$620,142.79**	**$641,508.28**		**$21,365.49**	**100.00%**	**34.50%**	**$30,393**	**4.74%**
CASH AND CASH EQUIVALENTS									
CASH EQUIVALENTS - TAXABLE									
ALLEGIANT MONEY MARKET FUND I SHARES									
05/09 - 12/09	184,822 840	$184,822 84	$184,822 84	$1 00		100 00%	9 92%	$185	0 10%
CASH									
INCOME CASH		$151,574 58	$151,574 58			82 01%	8.15%		
PRINCIPAL CASH		-$151,574 58	-$151,574 58			-82 01%	-8 15%		
TOTAL CASH									
TOTAL CASH AND CASH EQUIVALENTS		**$184,822.84**	**$184,822.84**			**100.00%**	**9.94%**	**$185**	**0.10%**
TOTAL PORTFOLIO		**$1,653,011.69**	**$1,859,671.90**		**$206,660.21**	**100.00%**	**100.00%**	**$49,202**	**2.65%**

21550019441665

Form **8868** (Rev April 2009) Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.

OMB No 1545-1709

- 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* and click on *e-file for Charities & Nonprofits.*

Type or print	Name of Exempt Organization	Employer identification number
	ANNA LAWLER CHARITABLE TRUST	36 7515019
File by the due date for filing your return See instructions	Number, street, and room or suite no. If a P O. box, see instructions. PNC BANK, NA PO BOX 94651	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions CLEVELAND OH 44101-4651	

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

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

- The books are in the care of ▶ PNC BANK NA PO BOX 94651, CLEVELAND OH 44101-4651

Telephone No ▶ (216) 257-4731 FAX No. ▶ (216) 257-5064

- 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 , 20 10 , to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ ☑ calendar year 20 09 or

▶ ☐ tax year beginning ______, 20 ___ , and ending ______, 20 ___

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

3a	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.	3a	$ 2415.
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.	3b	$ 0.
c	**Balance Due.** 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.	3c	$ 2415.

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.

- 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).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Type or print		
	Name of Exempt Organization LAWLER, ANNA CHARITABLE TRUST . PNC BANK	Employer identification number 36-7515019
File by the extended due date for filing the return See instructions.	Number, street, and room or suite no If a P O. box, see instructions P O BOX 94651	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. CLEVELAND, OH 44101	

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

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

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

- The books are in the care of ▶ PNC BANK NA

Telephone No. ▶ (216)257-4699 FAX No. ▶ 216-257-5064

- 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 11/15/2010 .

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: [X] Initial return [ ] Final return [ ] Change in accounting period

7 State in detail why you need the extension ADDITIONAL TIME IS REQUIRED TO GATHER INFORMATION NECESSARY TO PREPARE AND FILE A COMPLETE AND ACCURATE 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**	$ 2,415.
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**	$ 2,415.
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**	$ 2,415.

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 ▶ TAX MANAGER Date ▶ 08/06/2010