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OMB No 1545-0052

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

2009

For	cale	ndar year 2009, or tax year beginning 04-	01-2009 , and	dend	ding 03-31-	2010					
G	Che	ck all that apply Finitial return Finitial re	eturn of a former publ		•	al return					
_		Name of foundation		Chai		entification numbe	er				
Us	e the] label.		04-6042910								
Ot	herwi		B Telephone nu	ımber (see page 10 d	of the instructions)						
	print or type	99-50 FLORENCE STREET									
Sec	e Spec	ific	C If exemption	application is pendin	g chack bara 🕨 🗀						
Ins	tructio	Ons. City or town, state, and ZIP code CHESTNUT HILL, MA 024671935				rganizations, check h	<u> </u>				
		L			D 1. Foleigh of	gamzations, eneck in	F 1				
		pe of organization Section 501(c)(3) exempt prival 4947(a)(1) nonexempt charitable trust Other taxa		n		rganizations meeting e and attach comput					
		set value of all assets at end J <u>Ac</u> counting method	Cash Acci	ual		undation status was t n 507(b)(1)(A), chec					
		From Part II, col. (c),				ation is in a 60-montl					
		(, =,, =), =,, =, =, =, =, =, =, =, =, =, =, =, =	t be on cash basis.) I			n 507(b)(1)(B), chec	k here				
Pa	rt I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))	(a) Revenue and expenses per books	(b) N	let investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)				
	1	Contributions, gifts, grants, etc , received (attach schedule)									
	2	Check F 7 if the foundation is not required to attach Sch B									
	3	Interest on savings and temporary cash investments	3,033		3,033						
	4	Dividends and interest from securities	14,216		14,216						
	5a	Gross rents									
	Ь	Net rental income or (loss)									
<u>Ф</u>	6a	Net gain or (loss) from sale of assets not on line 10	1,039								
Revenue	b	Gross sales price for all assets on line 6a 16,533									
	7	Capital gain net income (from Part IV, line 2)			1,039						
	8	Net short-term capital gain									
	9	Income modifications									
	10a	Gross sales less returns and allowances									
	b	Less Cost of goods sold									
	·	Gross profit or (loss) (attach schedule)									
	11 12	Total. Add lines 1 through 11	18,288		18,288						
	13	Compensation of officers, directors, trustees, etc	0		0		0				
	14	Other employee salaries and wages									
φ	15	Pension plans, employee benefits									
en:	16a	Legal fees (attach schedule)									
Expenses	Ь	Accounting fees (attach schedule)	12,000		8,000		4,000				
		Other professional fees (attach schedule)									
300	17	Interest									
and Administrative	18	Taxes (attach schedule) (see page 14 of the instructions)	10,000		0		0				
	19	Depreciation (attach schedule) and depletion									
Ē	20	Occupancy									
₽ -	21	Travel, conferences, and meetings	1,201		0		1,201				
	22	Printing and publications									
Ē	23	Other expenses (attach schedule)	79,777		151		35				
Operating	24	Total operating and administrative expenses.			<u> </u>						
₹.		Add lines 13 through 23	102,978		8,151		5,236				
0	25	Contributions, gifts, grants paid	241,335				241,335				
	26	Total expenses and disbursements. Add lines 24 and 25	344,313		8,151		246,571				
	27	Subtract line 26 from line 12									
	a	Excess of revenue over expenses and disbursements	-326,025								
	ь	Net investment income (If negative, enter -0-)			10,137						
	С	Adjusted net income (If negative, enter -0-)									

Pa	rt II	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	(h) Deele Ve		of year
	1	Cash—non-interest-bearing	(a) Book Value	(b) Book Va	iue	(c) Fair Market Value
	2	Savings and temporary cash investments	808,955		.54,36	154,367
	3	Accounts receivable - 4,309			.,	
		Less allowance for doubtful accounts 🟲		4,30	99 4,309	
	4	Pledges receivable		-,	1	
	•	Less allowance for doubtful accounts				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other				
	Ū	disqualified persons (attach schedule) (see page 15 of the				
		instructions)				
	7	Other notes and loans receivable (attach schedule)				+
	•					
ا ی		Less allowance for doubtful accounts 🟲				
Assets	8	Inventories for sale or use				
¥	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)	552,776	_	'34,66	574,289
	c	Investments—corporate bonds (attach schedule)	55,000	<u> </u>	43,00	43,000
	11	Investments—land, buildings, and equipment basis 🟲				
		Less accumulated depreciation (attach schedule)				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)	507,657	*	66,14	535,310
	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				
		ınstructions Also, see page 1, item I)	1,928,511	1,6	02,48	1,311,275
	17	Accounts payable and accrued expenses				
	18	Grants payable				
å l	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
apilit	21	Mortgages and other notes payable (attach schedule)				
┛┃	22	Other liabilities (describe 🟲)				
	23	Total liabilities (add lines 17 through 22)	0			<u> </u>
		Foundations that follow SFAS 117, check here				
œ.		and complete lines 24 through 26 and lines 30 and 31.				
or Fund Balances	24	Unrestricted				4
<u> </u>	25	Temporarily restricted				4
酋	26	Permanently restricted				4
ĭ		Foundations that do not follow SFAS 117, check here				
피		and complete lines 27 through 31.	0			
	27	Capital stock, trust principal, or current funds	0			
Assets	28	Paid-in or capital surplus, or land, bldg, and equipment fund	1,928,511	1.4	:02.49	0
ŝ	29	Retained earnings, accumulated income, endowment, or other funds	1,920,311	1,0	602,48	-
Š	30	Total net assets or fund balances (see page 17 of the	1,928,511	1.4	:02.49	16
Ž	24	Instructions)	1,920,311	1,0	602,48	4
	31	Total liabilities and net assets/fund balances (see page 17 of	1 029 511	1.4	:02.49	16
		the instructions)	1,928,511	1,0	602,48	0
Pa	rt II	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 ag	ree		
		with end-of-year figure reported on prior year's return)		<u>.</u>	L L	1,928,511
2		Enter amount from Part I, line 27a			2	-326,025
3		Other increases not included in line 2 (itemize) 🟲		[3	3	0
4		Add lines 1, 2, and 3				1,602,486
5		Decreases not included in line 2 (itemize) 🟲		:	5	0
6		Total net assets or fund balances at end of year (line 4 minus line 5)—F	Part II, column (b), lii	ne 30	,	1,602,486

Part .	(a) List and describe the kin 2-story brick warehouse, o		al estate,	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	2000 SHS, RTS PRECISION	N DRILLING TR		P	2009-05-13	2009-05-27
b	23 SHS, CALL SUNO CO			Р	2009-06-24	2009-08-21
	23 SHS, CALL SUNO CO			Р	2009-08-21	2009-09-18
d	Via K-1 LEM REAL ESTATE	<u> </u>		Р	2010-01-01	2010-03-31
	23 SHS, CALL SUNO CO			Р	2009-09-18	2010-01-15
	e) Gross sales price	(f) Depreciation allowed	(g) Cost	t or other basis	(h) Gain	or (loss)
	· · · · · · · · · · · · · · · · · · ·	(or allowable)	plus ex	pense of sale	(e) plus (f) minus (g)
a	714			2.20		714
b	2,384			2,30	-	78
с	3,800			7,60		-3,807
d				70		-700
e	9,635			4,88	+	4,754
(i) F M V as of 12/31/69		(j) A djusted basis as of 12/31/69	(k) Exc	n on 12/31/69 cess of col (1) ol (j), if any	col (k), but not	(h) gain minus less than -0-) or om col (h))
а						714
ь						78
С						-3,807
d						-700
e						4,754
3	Capital gain net income or (r Net short-term capital gain of If gain, also enter in Part I, I If (loss), enter -0- in Part I,	ret capital loss) or (loss) as defined in section one 8, column (c) (see pages		in Part I, line 7	} 3	1,039
Was the If "Yes,	on 4940(d)(2) applies, leave the foundation liable for the section the foundation does not qualify	on 4942 tax on the distributa y under section 4940(e) Do	not complete this	part		├ Yes ├ No
1 En	ter the appropriate amount in e	ach column for each year, se	ee page 18 of the ir	nstructions before		
Base year ((a) e period years Calendar or tax year beginning in)	(b) usted qualifying distributions	(c) Net value of noncha	ritable-use assets	(d) Distribution (col (b) divided	
	2008	408,375		1,956,687		0 208707
	2007	369,721		2,647,770		0 139635
	2006	395,910		3,024,122		0 130917 0 251716
	2003	555,507 494,091		2,206,876 1,701,344		0 290412
2	Total of line 1, column (d).			2,7 0 2,0 1 1	2	1 021387
3	A verage distribution ratio for			e 2 by 5. or by	-	1 021307
•	the number of years the foun				3	0 204277
4	Enter the net value of nonch		4	1,461,288		
5	Multiply line 4 by line 3		5	298,508		
6	Enter 1% of net investment	income (1% of Part I, line 27	⁷ b)		6	101
7	Add lines 5 and 6				7	298,609
8	Enter qualifying distributions If line 8 is equal to or greate				8 part using a 1% tax	246,571 crate See

	990-PF (2009)			age 4
	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the ins	tructio	ns)	
1a	Exempt operating foundations described in section 4940(d)(2), check here T and enter "N/A" on line 1			
	Date of ruling or determination letter (attach copy of letter if necessary-see instructions)			
Ь	Domestic foundations that meet the section 4940(e) requirements in Part V, check			203
	here Fand enter 1% of Part I, line 27b			
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-)			0
3	Add lines 1 and 2			203
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0			203
6	C redits/P ay ments			
а	2009 estimated tax payments and 2008 overpayment credited to 2009 6a 3,440			
b	Exempt foreign organizations—tax withheld at source 6b			
С	Tax paid with application for extension of time to file (Form 8868)			
d	Backup withholding erroneously withheld 6d			
7	Total credits and payments Add lines 6a through 6d			3,440
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached.			
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			3,237
11	Enter the amount of line 10 to be Credited to 2010 estimated tax 3,237 Refunded 11			0
Par	t VII-A Statements Regarding Activities			
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did		Yes	No
	ıt participate or intervene in any political campaign?	. 1a		No
Ь	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		No
	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		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
	(1) On the foundation \$\bigs\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed			
_	on foundation managers \$0	_		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	. 2		No
_	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles	,		_{N-}
4a	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	. 3 4a		No No
4a b	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a 4b		140
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
3	If "Yes," attach the statement required by General Instruction T.	}		140
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
Ū	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	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the			\vdash
	instructions) ►MA			
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	Yes	
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		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Pai	t VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
	meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
	Website address ►N/A			
14	The books are in care of ▶The Foundation Telephone no ▶(781	237-	6655	
	Located at 99-50 FLORENCE STREET CHESTNUT HILL MA ZIP+4 0246719			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here		1	▶ ┌
	and enter the amount of tax-exempt interest received or accrued during the year			·
Pai	t VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes V No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes V No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes \(\bar{No} \)			
	(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)?			
	(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)			
ь	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		No
	Organizations relying on a current notice regarding disaster assistance check here			
с	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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private	<u> </u>		
-	operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
а	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 Vo			
	If "Yes," list the years > 20, 20, 20			
ь	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)			
b	(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		
_	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
С	► 20, 20, 20, 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business			
Ja	enterprise at any time during the year?			
ь	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.).	3ь		
40	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			No
4a		4a		140
Ь	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its			N1 -
	charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		No

Pa	rt VII-B	Statements Rega	rdina Act	ivities for	Wh	ich Form 4720	Mav	Be Required (conti	nued)			age e
5a		e year did the foundation	_									
		on propaganda, or other				ıslatıon (section 49	45(e))?	No			
	(2) Influe	ence the outcome of any	specific pub	lıc election (see	section 4955), or to	carı	y				
		rectly or indirectly, any v							No			
		de a grant to an individua						┌ Yes रि				
	• •	de a grant to an organiza	·	• •		, ,	scrib	ed				
									No			
			than religious, charitable, scientific, literary, or									
			he prevention of cruelty to children or animals?									
b			(5), did any of the transactions fail to qualify under the exceptions described in									
				a current notice regarding disaster assistance (see page 22 of the instructions)?								
				otice regarding disaster assistance check here								
c		wer is "Yes" to question						,				
Ī		use it maintained expend				•		Г Y es Г	- No			
		attach the statement requi					•	, .es ,	110			
6a												
ou	a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?											
ь		oundation, during the yea								6b		No
		o 6b, file Form 8870.	i, pay piem	iums, unecci,	, 01 1	nunectly, on a perso	Jiiai i	Jeneni contract.	•	0.5		110
7a		ne during the tax year, w	as the found	dation a narti	, to =	prohibited tay chal	torti	ansaction? Tyes F	- No			
	·	the foundation receive				•		,		7b		
	ir yes, uit							n Managers, Highly			lovo	
Pa	rt VIII	and Contractors	Officers	, Directors	, 11	ustees, Found	11101	i managers, inging	raiu	шр	loye	cs,
1	List all off	icers, directors, trustees	, foundatio	n managers a	nd t	heir compensation (see p	page 22 of the instruction	ns).			
			(b) Title, a	nd average	(4	C) Compensation		(d) Contributions to	(a) E	vnonc	0.3664	aunt
	(a) Na	me and address		er week	(1	f not paid, enter	1	mployee benefit plans	(e) Expense account other allowances			,
<u></u>	A	Data Tabla	aevotea i	o position		-0-)	and	deferred compensation				
See	Additional	Data Table										
							-					
2		tion of five highest-paid nter "NONE."	employees	(other than t	t hose	e included on line 1-	-see	page 23 of the instructio	ons).			
	. N	Laddona a C	(b) Ti	tle, and aver	age			(d) Contributions to	, , , -			
(a)		l address of each employ nore than \$50,000	ee i ho	urs per week	•	(c) Compensation	n	employee benefit plans and deferred			e acco	
	para	11010 111411 \$30,000	devo	ted to positi	on			compensation		iici uii	o manie	
NON	IE											
-												
			$\overline{}$									
									-			
	.1	fother employees hald o	<u> </u>	^				<u> </u>	-			-
I Ota	u numnar a	TOTAL AMBIOVAGE POID A	var « Sin nn									^

Part VIII Information About Officers, Directors, Trand Contractors (continued)	ustees, Foundation Managers, Highly	Paid Employees,
3 Five highest-paid independent contractors for professional serv	ices (see page 23 of the instructions). If none, e	nter "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 servi	ces	0
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year Inclu- organizations and other beneficiaries served, conferences convened, research papers		Expenses
1 NONE		0
2		
3		
4		
Part IX-B Summary of Program-Related Investmen	its (see page 23 of the instructions)	
Describe the two largest program-related investments made by the foundation d	uring the tax year on lines 1 and 2	A mount
1 NONE		0
2		
All other program-related investments See page 24 of the instruc	tions	
3		

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

	see page 24 of the instructions.)		1
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc ,		
	purposes		
а	A verage monthly fair market value of securities	1a	1,051,420
b	A verage of monthly cash balances	1b	432,121
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	1,483,541
e	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	1,483,541
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25		
	of the instructions)	4	22,253
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,461,288
6	Minimum investment return. Enter 5% of line 5	6	73,064
Pai	Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(
	foundations and certain foreign organizations check here 🕨 📗 and do not complete t	his pa	
1	Minimum investment return from Part X, line 6	1	73,064
2a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009 (This does not include the tax from Part VI) 2b		
c	Add lines 2a and 2b	2c	203
3	Distributable amount before adjustments Subtract line 2c from line 1	3	72,861
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	72,861
6	Deduction from distributable amount (see page 25 of the instructions)	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII,		
	line 1	7	72,861
Par	XII Qualifying Distributions (see page 25 of the instructions)		
1	A mounts paid (including administrative expenses) to accomplish charitable, etc , purposes		T
		4-	246 571
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	246,571
ь	Program-related investments—total from Part IX-B	1b	0
2	A mounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc ,	_	
	purposes	2	
3	A mounts set aside for specific charitable projects that satisfy the	_	
а	Suitability test (prior IRS approval required)	3a	
Ь	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	246,571
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	246,571
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating wheth the section 4940(e) reduction of tax in those years	ner the	foundation qualifies for

For	n 990-PF (2009)					Page 9
P	art XIII Undistributed	Income (see page	26 of the instructi	ons)		
			(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1	Distributable amount for 2009	from Part XI, line 7				72,861
2	Undistributed income, if any, as	of the end of 2008				
а	Enter amount for 2008 only.				0	
ь	Total for prior years 20	, 20, 20		0		
3						
а	From 2004	419,386				
b	From 2005	494,035				
c	From 2006					
d	From 2007	243,967				
e	From 2008	317,603				
f	Total of lines 3a through e		1,725,799			
4	Qualifying distributions for 200	9 from Part				
	XII, line 4 🕨 \$	246,571				
а	Applied to 2008, but not more	than line 2a			0	
b	Applied to undistributed income	' '		0		
	(Election required—see page 26	of the instructions)		0		
С	Treated as distributions out of	' '	0			
	required—see page 26 of the in	·				72,861
	Applied to 2009 distributable a		173,710			72,861
	Remaining amount distributed o	·	<u> </u>			
5	Excess distributions carryover	· ·	0			0
	(If an amount appears in column same amount must be shown in					
6	Enter the net total of each coluindicated below:	umn as				
а	Corpus Add lines 3f, 4c, and 4e	Subtract line 5	1,899,509			
b	Prior years' undistributed incom	e Subtract				
	line 4b from line 2b			0		
С	Enter the amount of prior years					
	income for which a notice of def been issued, or on which the se	'				
	tax has been previously assess			0		
d	Subtract line 6c from line 6b T					
	amount—see page 27 of the ins			0		
e	Undistributed income for 2008	Subtract line				
	4a from line 2a Taxable amoun	, -			0	
_	of the instructions				0	
f	Undistributed income for 2009 lines 4d and 5 from line 1 This					
	be distributed in 2010					0
7	Amounts treated as distribution					
	corpus to satisfy requirements					
	section 170(b)(1)(F) or 4942(g		0			
	of the instructions)					
8	Excess distributions carryover applied on line 5 or line 7 (see prinstructions)	page 27 of the	419,386			
9	Excess distributions carryover t					
_	Subtract lines 7 and 8 from line		1,480,123			
10	Analysis of line 9					
	Excess from 2005	494,035				
ь	Excess from 2006	250,808				
c	Excess from 2007	243,967				
d	Excess from 2008	317,603				
e	Excess from 2009	173,710				

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

c Any submission deadlines

factors

Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to status of A mount any foundation manager contribution recipient Name and address (home or business) or substantial contributor a Paid during the year See Additional Data Table 241,335 **b** Approved for future payment

	-PF (2009) I-A Analysis of Income-Produc	ina Activitie	<u> </u>			Page 1 2
	s amounts unless otherwise indicated		ısıness income	Excluded by section	512, 513, or 514	(e) Related or exemp
1 Progra	m service revenue	(a) Busıness code	(b) A mount	(c) Exclusion code	(d) A mount	function income (See page 28 of the instructions)
b c d e f	and contracts from government agencies					
2 Memb	ership dues and assessments ton savings and temporary cash investments			14	3,033	
5 Netre	nds and interest from securities ntal income or (loss) from real estate			14	14,216	
b Not o	:-financed property					
8 Gain or9 Net in10 Gross11 Other	(loss) from sales of assets other than inventory come or (loss) from special events profit or (loss) from sales of inventory			18	1,039	
c d e	tel Add celumns (b) (d) and (e)		0		18,288	
13 Total.	tal Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions on page 2			1	•	18,288
Line No.	Explain below how each activity for wh the accomplishment of the organizatio page 28 of the instructions)					

	90-PF (2 XVII						sac	tions	and Relat	ionships With		Pa	ge 13
1 Did t	he organiz	ation directly or indirectly e					ganıza	ation desc	cribed in section	1		Yes	No
501(c) of the (Code (other than section 50	01(c)(3) org	ganızatıc	ons) or in sec	ction 527, relating	j to p	olitical org	ganizations?				
a Trai	nsfers fro	om the reporting found	dation to a	noncl	harıtable e	xempt organiz	atio	n of					
(1)	Cash.										. 1a(1)		No
(2)	Othera	ssets									1a(2)		No
b Oth	er transa	actions											
(1)	Sales o	fassets to a noncharit	table exe	mpt or	ganızatıon						. 1b(1)		No
(2)	Purchas	ses of assets from a no	onc harıta	ble ex	empt orga	nization					1b(2)		No
		of facilities, equipment									<u> </u>		No
		rsement arrangements											No
		r loan guarantees											No
		ance of services or me											No
		icilities, equipment, m	•		-						<u> </u>		No
d If th of th in a	ne answe ne goods ny trans	r to any of the above 1: , other assets, or serv action or sharing arrar	is "Yes," c vices give ngement,	omple n by tl show i	te the follo he reportir n column	owing scheduling foundation (d) the value of	e Co Ifth ofthe	olumn (l e founda e goods,	b) should alv ation receive , other asset	vays show the fair ed less than fair m s, or services rec	market va arket value eived		
(a) Line	No ((b) Amount involved	(c) Name o	of nonch	arıtable exei	mpt organization		(d) Desc	cription of trans	sfers, transactions, and	d sharing arra	ingemer	nts
							_						
							-						
							+						
							-						
							+						
							1						
							+						
							+						
des	crıbed ın 'es," cor	ation directly or indire section 501(c) of the nplete the following sc	Code (ot		an section		rıns					es F	<i>7</i> No
	the be based	penalties of perjury, I st of my knowledge and on all information of wi ****	ıd belief, i	t ıs tru	ie, correct	, and complete		claratio					
	Sig	nature of officer or tru	ıstee					Date		Title			
Sign Here	er's nly	Preparer's STEVE Signature	EN B SCH	SCHWARTZ CPA			Dat 20	te 011-02-09	Check if self- employed ▶	Preparer' Identifyin number (s Signature 30 of the i	g see son pa	_	
	Paid Preparer's Use Only	Firm's name (or your: if self-employed),	rs F	FRIEDMAN SUVALLE & SALOMON PC CPA EIN F									
	_	address, and ZIP cod	de 7	0 WEI	LLS AVEN	UE				-			
				. = =		2.450				Phone no (617) 641-0040			
			N	NEWTO	ON, MA O	2459							

Additional Data

Software ID: 09000028

Software Version: 2009.05050

EIN: 04-6042910

Name: WILLIAM AND CYNTHIA MARCUS FAMILY CHARITABLE

TRUST

Form 990PF Part VIII Line 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
WILLIAM M MARCUS	TRUSTEE	0	0	0
99-50 FLORENCE STREET CHESTNUT HILL, MA 024671935	10 00			
CYNTHIA S MARCUS	TRUSTEE	0	0	0
99-50 FLORENCE STREET CHESTNUT HILL, MA 024671935	1 00			
DANIEL H MARCUS	TRUSTEE	0	0	0
99-50 FLORENCE STREET CHESTNUT HILL, MA 024671935	1 00			
MELANIE L MARCUS	TRUSTEE	0	0	0
99-50 FLORENCE STREET CHESTNUT HILL, MA 024671935	1 00			
RICHARD S MARCUS	TRUSTEE	0	0	0
99-50 FLORENCE STREET CHESTNUT HILL, MA 024671935	1 00			

Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
a Paid during the year				
AMERICAN HEART ASSOCIATION 185 Franklın Street Boston, MA 02110	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	75
AMERICAN TECHNION SOCIETY1 Gateway Ctr 515 Newton,MA 02458	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	10,000
avon walk for breast cancer33 broad street suite 700 boston, MA 02109	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	100
BABSON COLLEGE231 Forest Street Babson Park, MA 02457	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	5,000
BARNSTORMERS theaterPO BOX 434 104 Main Street Tamworth,NH 03886	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	100
BROOKLINE EDUCATION FOUNDATION40 Webster Place Brookline, MA 02445	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	1,100
CAMP HALE333 Nahanton Steet Newton Center, MA 02459	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	1,000
CHABAD lubavitch7 Camelot Place Manchester, NH 03104	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	500
DANA FARBER44 Binney Street Boston, MA 02115	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	50
FRIENDS OF ISRAEL DEFENSE FORCES154 Wells Ave Newton,MA 02459	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	1,500
GANN ACADEMY333 Forest Street Waltham, MA 02452	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	40,125
GATEWAYS FOR EDUCATION 333 Nahanton Steet Newton, MA 02459	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	2,500
GRO W CLINICBoston Medical Center Boston, MA 02118	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	2,500
JEWISH COMMUNITY CENTER333 nahanton Steet newton, MA 02459	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	8,000
JEWISH FEDERATION126 High Street Boston, MA 02110	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	10,450
Total			▶ 3a	241,335

If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount
any foundation manager or substantial contributor	recipient		
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	500
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	1,050
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	1,250
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	100
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	1,000
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	5,000
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	2,500
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	9,000
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	100
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	100
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	1,000
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	100
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	100
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	2,500
N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	500
	any foundation manager or substantial contributor N/A N/A N/A N/A N/A N/A N/A N/	any foundation manager or substantial contributor N/A N/A PUBLIC CHARITY N/A PUBLIC CHARITY N/A PUBLIC CHARITY N/A PUBLIC CHARITY PUBLIC CHARITY N/A PUBLIC CHARITY	any foundation manager or substantial contributor N/A PUBLIC CHARITY PUBLIC TO FURTHER ENTITY'S EXEMPT PURPOSE N/A PUBLIC CHARITY PUBLIC TO FURTHER ENTITY'S EXEMPT PURPOSE N/A PUBLIC CHARITY PUBLIC TO FURTHER ENTITY'S EXEMPT PURPOSE N/A PUBLIC TO FURTHER ENTITY'S EXEMPT PURPOSE

Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
a Paid during the year				
SOLOMON SCHECTER DAY SCHOOL60 Stein Circle Newton,MA 02459	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	22,200
SQUAM LAKES SCIENCE CENTER23 Science Center Road Holderness,NH 03245	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	500
TEMPLE BETH ELOHIM10 Bethel Road Wellesley, MA 02481	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	6,000
TEMPLE ISRAEL477 Longwood Ave Boston, MA 02215	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	4,000
ZAMIR CHORALE1320 Centre Street Newton Center, MA 02459	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	500
Brookline High School115 Greenough Street Brookline, MA 02445	n/A	PubLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	8,125
A merican Jewish Committee126 High Street Boston, MA 02110	n/A	PUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	2,500
B S Jewish Film Festival1001 Watertown Street newton, MA 02465	n/A	PUBLIC CHARITY	to FURTHER ENTITY'S EXEMPT PURPOSE	2,500
Center Harbor Food Pantry80 Bean Road Center Harbor, NH 03226	n/A	pUBLIC CHARITY	to FURTHER ENTITY'S EXEMPT PURPOSE	50
Combined Jewish Philanthropies 126 High Street boston, MA 02110	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	37,885
Facing History16 Hurd Road brookline,MA 02445	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	2,500
Hebrew Senior LIfe1200 Centre Street Roslindale, MA 02131	n/a	pUBLIC CHARITY	to FURTHER ENTITY'S EXEMPT PURPOSE	5,450
museum of fine arts465 Huntington Ave Boston, MA 02115	n/A	pUBLIC CHARITY	to FURTHER ENTITY'S EXEMPT PURPOSE	750
Museum of Science1 science park Boston, MA 02114	n/a	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	165
SMITH LEADERSHIP Academy School23 Leonard Street Dorchester, MA 02122	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	1,500
Total				241,335

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	A mount
a Paid during the year				
United Way46 South Main Street Concord, NH 03301	n/A	pUBLIC CHARITY	to FURTHER ENTITY'S EXEMPT PURPOSE	600
Belmont Golf Scholarship Fund 181 Winter Street Belmont, MA 02478	n/A	pUBLIC CHARITY	to FURTHER ENTITY'S EXEMPT PURPOSE	250
Beth Israel Deaconess Medical Center 330 Brookline Ave Boston, MA 02115	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	15,000
Jewish Alliance for Law and Social Action18 Tremont Street Boston, MA 02108	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	250
Jewish Community Housing for the Elderly30 Wallingford Road brighton,MA 02135	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	500
Jewish Theological Seminary 3080 Broadway new York, NY 10027	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	2,500
Merrimack Valley Jewish Federation of MassachusettsPO box 937 andover, MA 01810	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	1,000
A merican Red Magen David for Israel 5352 7th Ave 400 New York, NY 10001	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	100
Friends of Yemin Orde4501 Connecticut Avenue NW Suite 813 Washington, DC 20008	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	50
CAMERApo box 35040 BOSTON,MA 02135	N/A	PUBLIC CHARITY	TO FURTHER ENTITY'S EXEMPT PURPOSE	2,500
AMERICAN PHILATELIC SOCIETY 100 Oakwood Ave PO BOX 8000 State College, MA 16803	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	135
AHRC189 Wheatley Road Brookville, NY 11545	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	25
jewish distribution committee132 east 43rd street po box 530 new York, NY 10017	n/A	pUBLIC CHARITY	tO FURTHER ENTITY'S EXEMPT PURPOSE	16,000
Total				241,335

TY 2009 Accounting Fees Schedule

Name: WILLIAM AND CYNTHIA MARCUS FAMILY CHARITABLE TRUST

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	12,000	8,000		4,000

TY 2009 Investments Corporate Bonds Schedule

Name: WILLIAM AND CYNTHIA MARCUS FAMILY CHARITABLE TRUST

Name of Bond	End of Year Book Value	End of Year Fair Market Value
MARKETABLE SECURITIES	43,000	43,000

TY 2009 Investments Corporate Stock Schedule

Name: WILLIAM AND CYNTHIA MARCUS FAMILY CHARITABLE TRUST

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MARKETABLE SECURITIES	734,663	574,289

TY 2009 Investments - Other Schedule

Name: WILLIAM AND CYNTHIA MARCUS FAMILY CHARITABLE TRUST

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
PARTNERSHIP	AT COST	189,841	148,869
PARTNERSHIP	AT COST	476,306	386,441

TY 2009 Other Expenses Schedule

Name: WILLIAM AND CYNTHIA MARCUS FAMILY CHARITABLE TRUST

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE FILING FEE	35	0		35
BANK CHARGES	151	151		0
FROM LIMITED PARTNERSHIP INTEREST LEM REAL ESTATE MEZZANINE FUND, L P	21,901	0		0
FROM LIMITED PARTNERSHIP INTEREST LEM REAL ESTATE MEZZANINE FUND II, L P	57,690	0		0

TY 2009 Taxes Schedule

Name: WILLIAM AND CYNTHIA MARCUS FAMILY CHARITABLE TRUST

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE	10,000	0		0