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# Return of Private Foundation

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

### Treated as a Private Foundation

2009

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2009, or tax year beginning APR 1, 2009, and ending MAR 31, 2010

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

Use the IRS label. Otherwise, print or type. See Specific Instructions	Name of foundation <b>ASSOCIATION FOR THE RELIEF OF AGED WOMEN OF NEW BEDFORD</b>		A Employer identification number <b>04-6056367</b>
	Number and street (or P O box number if mail is not delivered to street address) Room/suite <b>432 COUNTY STREET</b>		B Telephone number <b>(508) 717-0400</b>
	City or town, state, and ZIP code <b>NEW BEDFORD, MA 02740</b>		C If exemption application is pending, check here <input type="checkbox"/>
	H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 16,215,639.</b> (Part I, column (d) must be on cash basis.)		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	14.		N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	448,884.	448,884.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,428,348.			
	b Gross sales price for all assets on line 6a	4,220,163.			
	7 Capital gain net income (from Part IV, line 2)		1,428,348.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income	20,092.	0.		STATEMENT 2	
12 Total. Add lines 1 through 11	1,897,338.	1,877,232.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	58,058.	0.		58,058.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits	14,389.	0.		14,389.
	16a Legal fees STMT 3	1,230.	0.		1,230.
	b Accounting fees STMT 4	29,040.	10,164.		18,876.
	c Other professional fees STMT 5	77,418.	15,076.		62,342.
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion	439.	0.		
	20 Occupancy	13,014.	0.		13,014.
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 6	13,880.	7.		13,873.
	24 Total operating and administrative expenses. Add lines 13 through 23	207,468.	25,247.		181,782.
	25 Contributions, gifts, grants paid	584,340.			584,340.
26 Total expenses and disbursements. Add lines 24 and 25	791,808.	25,247.		766,122.	
27 Subtract line 26 from line 12	1,105,530.				
a Excess of revenue over expenses and disbursements		1,851,985.			
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)			N/A		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing			1,017,988.	844,405.	844,405.
	2 Savings and temporary cash investments					
	3 Accounts receivable ▶					
	Less allowance for doubtful accounts ▶					
	4 Pledges receivable ▶					
	Less allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons					
	7 Other notes and loans receivable ▶					
	Less allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments - U.S. and state government obligations					
	b Investments - corporate stock					
	c Investments - corporate bonds					
11 Investments - land, buildings, and equipment basis ▶						
Less accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other	STMT 7	11,910,596.	15,369,775.	15,369,775.		
14 Land, buildings, and equipment basis ▶	4,450.					
Less accumulated depreciation	STMT 8 ▶	2,991.	808.	1,459.	1,459.	
15 Other assets (describe ▶)						
16 Total assets (to be completed by all filers)		12,929,392.	16,215,639.	16,215,639.		
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					
	22 Other liabilities (describe ▶)					
23 Total liabilities (add lines 17 through 22)		0.	0.			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	24 Unrestricted		12,929,392.	16,215,639.		
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>					
	27 Capital stock, trust principal, or current funds					
	28 Paid-in or capital surplus, or land, bldg, and equipment fund					
	29 Retained earnings, accumulated income, endowment, or other funds					
30 Total net assets or fund balances		12,929,392.	16,215,639.			
31 Total liabilities and net assets/fund balances		12,929,392.	16,215,639.			

## 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	12,929,392.
2 Enter amount from Part I, line 27a	2	1,105,530.
3 Other increases not included in line 2 (itemize) ▶ UNREALIZED GAINS/LOSSES	3	2,180,717.
4 Add lines 1, 2, and 3	4	16,215,639.
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) - Part II, column (b), line 30	6	16,215,639.

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**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.)
<b>1a SALE OF INVESTMENTS</b>	P	VARIOUS	VARIOUS
<b>b PIMCO COMM REAL RET STRAT FUND</b>	P	VARIOUS	VARIOUS
c			
d			
e			

  

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 4,215,282.		2,791,815.	1,423,467.
b 4,881.			4,881.
c			
d			
e			

  

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			1,423,467.
b			4,881.
c			
d			
e			

  

<b>2</b> Capital gain net income or (net capital loss)	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;">           If gain, also enter in Part I, line 7            If (loss), enter -0- in Part I, line 7         </div> <div style="margin-left: 10px;">           2           <div style="border-bottom: 1px solid black; width: 100px;"></div> </div> </div>	1,428,348.
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;">           If gain, also enter in Part I, line 8, column (c).            If (loss), enter -0- in Part I, line 8         </div> <div style="margin-left: 10px;">           3           <div style="border-bottom: 1px solid black; width: 100px;"></div> </div> </div>	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	927,457.	16,121,325.	.057530
2007	1,160,664.	19,616,676.	.059167
2006	1,105,703.	18,279,342.	.060489
2005	1,019,009.	16,083,376.	.063358
2004	384,894.	16,376,200.	.023503

  

<b>2</b> Total of line 1, column (d)	2	.264047
<b>3</b> 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	.052809
<b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	14,081,485.
<b>5</b> Multiply line 4 by line 3	5	743,629.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	6	18,520.
<b>7</b> Add lines 5 and 6	7	762,149.
<b>8</b> Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	766,122.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	18,520.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	18,520.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	18,520.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	4,960.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	4,960.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	13,560.	
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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> 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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	X	
14 The books are in care of ▶ LYNN WYLDE Telephone no ▶ 508-717-0400			
Located at ▶ 432 COUNTY STREET, NEW BEDFORD, MA ZIP+4 ▶ 02740			
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A			

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

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

		Yes	No
1a During the year did the foundation (either directly or indirectly)			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b	
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 instructions )	N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009 )	N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

6b

X

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

If "Yes" to 6b, file Form 8870.

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 9		58,058.	10,449.	0.

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

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

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

0

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**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
US TRUST	INVESTMENT SERVICES	75,378.
Total number of others receiving over \$50,000 for professional services		0

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 THE ORGANIZATION AIDES AGED WOMEN AND OTHER EXEMPT ORGANIZATIONS BY FURNISHING FINANCIAL ASSISTANCE AND RELIEF	739,104.
2	
3	
4	

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

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

	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	13,961,913.
b	Average of monthly cash balances	1b	959,472.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	14,921,385.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	14,921,385.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) STMT 10	4	839,900.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	14,081,485.
6	Minimum investment return. Enter 5% of line 5	6	704,074.

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

1	Minimum investment return from Part X, line 6	1	704,074.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	18,520.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	18,520.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	685,554.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	685,554.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	685,554.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	766,122.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	766,122.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	18,520.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	747,602.

**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.

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**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				685,554.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006	216,368.			
d From 2007	236,514.			
e From 2008	131,287.			
f Total of lines 3a through e	584,169.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 766,122.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				685,554.
e Remaining amount distributed out of corpus	80,568.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	664,737.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	664,737.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006	216,368.			
c Excess from 2007	236,514.			
d Excess from 2008	131,287.			
e Excess from 2009	80,568.			

## Page 10

## ASSOCIATION FOR THE RELIEF OF AGED WOMEN

Form 990-PF (2009)

OF NEW BEDFORD

04-6056367 Page 11

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

Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year					
SEE STATEMENT 11					
Total				3a	584,340.
b Approved for future payment					
NONE					
Total				3b	0.



## Form 990-PF (2009)

04-6056367 Page 13

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?

Yes	No
-----	----

**a Transfers from the reporting foundation to a noncharitable exempt organization of**

(1) Cash

**(2) Other assets**

### Other transactions

**(1) Sales of assets to a noncharitable exempt organization**

**(2) Purchases of assets from a noncharitable exempt organization**

**(3) Rental of facilities, equipment, or other assets**

#### (4) Reimbursement arrangements

**(5) Loans or loan guarantees**

**(6) Performance of services or membership or fundraising solicitations**

**c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees

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

[illegible]

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

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

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

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

**Sign Here**

Signature of officer or trustee

Date \_\_\_\_\_

Title

Preparer's  
signature

Firm's name (or yours if self-employed),  
address, and ZIP code

Peter C. Ham CPA

BURKE & LAMB, P.C.

300 UNION STREET

NEW BEDFORD, MA 02740

	<b>Date</b>
--	-------------

JUN 29 2018

☐ Check if self-employed

# EIN

Preparer's identifying number	
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P00365719

**04-3496650**

Phone no 508-984-4800

Form **990-PF** (2009)

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FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
US TRUST	448,884.	0.	448,884.
TOTAL TO FM 990-PF, PART I, LN 4	448,884.	0.	448,884.

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FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FEDERAL TAX REFUND	20,092.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	20,092.	0.	

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FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	1,230.	0.		1,230.
TO FM 990-PF, PG 1, LN 16A	1,230.	0.		1,230.

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FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTANTS	29,040.	10,164.		18,876.
TO FORM 990-PF, PG 1, LN 16B	29,040.	10,164.		18,876.

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FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
US TRUST	75,378.	15,076.		60,302.
CONSULTANTS	2,040.	0.		2,040.
TO FORM 990-PF, PG 1, LN 16C	77,418.	15,076.		62,342.

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FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISC ADMINISTRATIVE EXPENSE	8,952.	0.		8,952.
INSURANCE	3,716.	0.		3,716.
OFFICE EQUIPMENT & FURNITURE	1,205.	0.		1,205.
INVESTMENT EXPENSE	7.	7.		0.
TO FORM 990-PF, PG 1, LN 23	13,880.	7.		13,873.

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FORM 990-PF	OTHER INVESTMENTS	STATEMENT	7
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
	COST	15,369,775.	15,369,775.
TOTAL TO FORM 990-PF, PART II, LINE 13		15,369,775.	15,369,775.

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FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	8
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTER	1,470.	956.	514.
CARPET	1,890.	1,890.	0.
COMPUTER EQUIPMENT	1,090.	145.	945.
TOTAL TO FM 990-PF, PART II, LN 14	4,450.	2,991.	1,459.



FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 9

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
CHERYL RANDALL	EXECUTIVE DIRECTOR 40.00	58,058.	10,449.	0.
NANCY KURTZ	PRESIDENT 6.00	0.	0.	0.
ROSEMARY SABER	VICE PRESIDENT 3.00	0.	0.	0.
LYNN WYLDE	TREASURER 5.00	0.	0.	0.
ROSEANNE O'CONNELL	CLERK 6.00	0.	0.	0.
HOPE ATKINSON	TRUSTEE 2.00	0.	0.	0.
ELIZABETH BRINKERHOFF	TRUSTEE 3.00	0.	0.	0.
SANDRA FOGG	TRUSTEE 2.00	0.	0.	0.
SALLY HAND	TRUSTEE 3.00	0.	0.	0.
GILLIAN HARRIS	TRUSTEE 2.00	0.	0.	0.
MARY LITTLE	TRUSTEE 2.00	0.	0.	0.

## ASSOCIATION FOR THE RELIEF OF AGED WOMEN

04-6056367

HANNAH LLOYD	TRUSTEE			
	2.00	0.	0.	0.
LORRAINE MELLO	TRUSTEE			
	1.00	0.	0.	0.
CAROL MUNGER	TRUSTEE			
	1.00	0.	0.	0.
JEAN SILVER	TRUSTEE			
	1.00	0.	0.	0.
ANNE WEBB	TRUSTEE			
	1.00	0.	0.	0.
GRETCHEN WHIPPLE	TRUSTEE			
	2.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		<u>58,058.</u>	<u>10,449.</u>	<u>0.</u>

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FORM 990-PF	CASH DEEMED CHARITABLE EXPLANATION STATEMENT	STATEMENT	10
	PART X, LINE 4		

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\$839,900 IS DEEMED NECESSARY TO PAY BUDGETED EXPENSES AND  
DISBURSEMENTS.

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 11

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ART THERAPY INSPIRATIONAL ART FOR SENIORS, INC. 1 BROOKLAWN STREET NEW BEDFORD, MA 02745	ELDER SERVICES	PUBLIC CHARITY	4,000.
COASTLINE ELDERLY SERVICES, INC. 1646 PURCHASE STREET NEW BEDFORD, MA 027406819	ELDER SERVICES	PUBLIC CHARITY	136,000.
COMMUNITY NURSE & HOSPICE CARE, INC. 62 CENTER STREET FAIRHAVEN, MA 02719	ELDER SERVICES	PUBLIC CHARITY	15,000.
DARTMOUTH COUNCIL ON AGING 828 DARTMOUTH STREET S DARTMOUTH, MA 02748	ELDER SERVICES	TOWN AGENCY	33,020.
FAIRHAVEN COUNCIL ON AGING 229 HUTTLESTON AVENUE FAIRHAVEN, MA 027191956	ELDER SERVICES	TOWN AGENCY	36,000.
GREATER NEW BEDFORD COMMUNITY HEALTH CENTER, INC. 874 PURCHASE STREET NEW BEDFORD, MA 027406232	ELDER SERVICES	PUBLIC CHARITY	40,000.
OTHER INDIVIDUALS SEE ATTACHED LIST	ELDER SERVICES	INDIVIDUAL	295,320.
WESTPORT COUNCIL ON AGING 75 REED ROAD WESTPORT, MA 02790	ELDER SERVICES	TOWN AGENCY	19,000.

ASSOCIATION FOR THE RELIEF OF AGED WOMEN

04-6056367

YWCA SOUTHEASTERN MASS  
20 SOUTH SIXTH STREET NEW ELDER SERVICES  
BEDFORD, MA 02740

PUBLIC 4,000.  
CHARITY

ACUSHNET COUNCIL ON AGING  
59 1/2 S MAIN ST ACUSHNET, MA ELDER SERVICES  
02743

TOWN 2,000.  
AGENCY

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

584,340.

ARAW SCHEDULE OF SALES TRANSACTIONS								
YEAR ENDED MARCH 31, 2010								
6/24/2010								
QUANTITY	SECURITY	DATE	PROCEEDS	FMV 3/31/2009	GAIN/ (LOSS)	TAX COST	GAIN/ (LOSS)	
3,200	AFLAC INC	4/13/2009	64,166 34	61,952 00	2,214 34	145,613 00	(81,446 66)	
200,000	US TREASURY NT 5 5%	5/15/2009	200,000 00	201,226 00	(1,226 00)	202,062 50	(2,062 50)	
3,000	AMERICAN EXPRESS CO	6/30/2009	67,882 25	40,890 00	26,992 25	118,784 72	(50,902 47)	
2,000	BPPLC	6/30/2009	92,229 62	0 00	92,229 62	30,911 37	61,318 25	
2,500	CHEVRON CORP	6/30/2009	164,183 52	168,100 00	(3,916 48)	21,008 13	143,175 39	
2,000	COCA COLA CO	6/30/2009	94,464 17	87,900 00	6,564 17	3,966 85	90,497 32	
3,000	DOMINION RES INC VA NEW	6/30/2009	96,868 10	92,970 00	3,898 10	110,940 50	(14,072 40)	
2,500	EMERSON ELEC CO	6/30/2009	80,606 42	71,450 00	9,156 42	8,240 44	72,365 98	
2,000	EXXON MOBIL CORP	6/30/2009	137,306 46	136,200 00	1,106 46	510 59	136,795 87	
1,500	HARLEY DAVIDSON INC	6/30/2009	23,729 23	20,085 00	3,644 23	77,454 75	(53,725 52)	
1,000	HERSHEY CO	6/30/2009	35,078 09	34,750 00	328 09	36,845 00	(1,766 91)	
1,400	ISHARE TR COHEN & STEERS REALTY MAJORS	6/30/2009	48,242 75	38,864 00	9,378 75	123,983 02	(75,740 27)	
1,500	JOHNSON & JOHNSON	6/30/2009	82,746 42	78,900 00	3,846 42	3,340 74	79,405 68	
1,400	KRAFT FOODS INC	6/30/2009	35,720 08	31,206 00	4,514 08	49,532 00	(13,811 92)	
3,000	MEDTRONIC INC	6/30/2009	100,399 61	88,410 00	11,989 61	115,443 75	(15,044 14)	
100,000	MERRILL LYNCH & CO 5 45% 7/15/14	6/30/2009	93,938 00	75,765 00	18,173 00	100,450 00	(6,512 00)	
3,500	MOODY'S CORP	6/30/2009	88,860 96	80,220 00	8,640 96	87,093 13	1,767 83	
2,000	NOVARTIS	6/30/2009	80,579 92	75,660 00	4,919 92	113,510 00	(32,930 08)	
2,000	PEPSICO INC	6/30/2009	105,209 69	109,960 00	(4,750 31)	99,666 00	5,543 69	
4,500	PROCTER & GAMBLE CO	6/30/2009	225,569 74	211,905 00	13,664 74	49,110 30	176,459 44	
1,200	STRYKER CORP	6/30/2009	47,840 72	40,848 00	6,992 72	55,065 96	(7,225 24)	
3,000	SYSCO CORP	6/30/2009	68,053 24	68,400 00	(346 76)	82,046 00	(13,992 76)	
3,000	TIFFANY & CO	6/30/2009	76,183 04	64,680 00	11,503 04	105,439 12	(29,256 08)	
2,000	VERIZON COMMUNICATIONS INC	6/30/2009	61,124 42	60,400 00	724 42	17,196 22	43,928 20	
1,350	WELLS FARGO & CO	6/30/2009	31,555 43	19,224 00	12,331 43	45,653 08	(14,097 65)	
9,000	WYETH	10/16/2009	452,270 52	387,360 00	64,910 52	30,599 91	421,670 61	
50,000	FEDERAL HOME LN BKS 6 5%	11/13/2009	50,000 00	51,703 00	(1,703 00)	49,088 00	912 00	
2,000	COCA COLA CO	11/17/2009	111,751 72	87,900 00	9,601 72	3,966 85	107,784 87	
1,500	EXXON MOBIL CORP	11/17/2009	107,614 73	102,150 00	70,204 73	382 94	107,231 79	
3,000	IMS HEALTH INC	11/17/2009	63,585 76	37,410 00	26,175 76	81,895 00	(18,309 24)	
4,000	MERCK & CO INC	11/17/2009	131,777 01	107,000 00	24,777 01	35,650 85	96,126 16	
1,500	PRICE T ROWE GROUP INC	11/17/2009	76,562 53	50,505 00	26,057 53	26,087 41	50,475 12	
2,000	SCHLUMBERGER LTD	11/17/2009	128,768 48	81,240 00	47,528 48	9,710 43	119,058 05	
50,000	FEDERAL NATL MTG ASSN 7 25%	1/15/2010	50,000 00	52,437 50	(2,437 50)	49,778 00	222 00	
200,000	FEDERAL FARM CR BKS 5 45%	2/5/2010	200,000 00	206,250 00	(6,250 00)	200,000 00	0 00	
2,000	COCA COLA CO	2/22/2010	110,649 39	87,900 00	22,749 39	3,966 85	106,682 54	
1,000	SCHLUMBERGER LTD	2/22/2010	65,588 16	40,620 00	24,968 16	4,855 22	60,732 94	
2,500	STATE STR CORP	2/22/2010	112,022 57	76,950 00	35,072 57	128,490 00	(16,467 43)	
100,000	FEDERAL HOME LN BKS 5%	3/12/2010	100,000 00	103,781 00	(3,781 00)	99,846 00	154 00	
1,000	BOSTON PROPERTIES, INC	3/15/2010	73,578 06	35,030 00	38,548 06	83,683 50	(10,105 44)	
50,000	FEDERAL HOME LN MTG CORP 7%	3/15/2010	50,000 00	52,859 50	(2,859 50)	50,541 00	(541 00)	
3,500	PLUM CREEK TIMBER CO INC	3/15/2010	128,574 71	101,745 00	26,829 71	129,405 56	(830 85)	
			4,215,281 86	3,622,806 00	642,965 86	2,791,814 69	1,423,467 17	
			=====	=====	=====	=====	=====	

ASSOCIATION FOR THE RELIEF OF AGED WOMEN, INC.  
PAGE 11, PART XV, LINE 3A  
OTHER INDIVIDUALS  
APR 09 - MAR 10

A,L	Fairhaven, MA	6,147.94
A,E	So. Dartmouth, MA	1,186.70
A,L	Fairhaven, MA	1,710.00
A,I	Acushnet, MA	1,724.30
A,L	New Bedford, MA	1,196.50
A,P	Fairhaven, MA	1,800.00
B,I	Fairhaven, MA	1,574.45
B,B	Dartmouth, MA	1,610.00
B,L	Acushnet, MA	3,724.00
B,N	New Bedford, MA	2,440.00
B,A	Fairhaven, MA	2,084.10
B,M	Fairhaven, MA	3,420.00
B,B	Dartmouth, MA	6,120.00
B,C	New Bedford, MA	3,940.00
C,L	New Bedford, MA	1,410.64
C,J	Fairhaven, MA	2,088.00
C,L	New Bedford, MA	2,098.22
C,L	Fairhaven, MA	2,108.44
C,S	Westport, MA	2,500.00
C,M	Fairhaven, MA	2,488.44
C,R	Westport, MA	1,528.31
C,M	New Bedford, MA	1,305.11
D,M	N. Dartmouth, MA	1,393.00
D,P	Fairhaven, MA	2,459.90
D,V	Fairhaven, MA	2,473.18
D,E	New Bedford, MA	2,500.00
D,V	Fairhaven, MA	2,970.00
D,M	Fairhaven, MA	1,890.00
D,H	New Bedford, MA	8,002.22
D,L	Dartmouth, MA	1,096.00
E,E	Fairhaven, MA	1,998.22
F,R	New Bedford, MA	1,848.54
G,B	Fairhaven, MA	3,463.44
G,F	Dartmouth, MA	6,120.00
G,C	New Bedford, MA	4,160.00
C,F	Fairhaven, MA	2,108.44
G,A	Fairhaven, MA	1,073.56
G,F	Fairhaven, MA	2,250.00
G,P	New Bedford, MA	2,092.74

**ASSOCIATION FOR THE RELIEF OF AGED WOMEN, INC.****PAGE 11, PART XV, LINE 3A****OTHER INDIVIDUALS****APR 09 - MAR 10**

H,M	New Bedford, MA	8,784.77
H,G	Fairhaven, MA	1,449.31
I,M	N. Dartmouth, MA	511.40
J,E	Fairhaven, MA	2,098.22
J,S	Fairhaven, MA	2,119.96
K,J	Fairhaven, MA	3,308.44
K,M	Fairhaven, MA	4,470.00
K,I	Fairhaven, MA	1,640.78
L,B	Fairhaven, MA	2,342.00
L,H	So. Dartmouth, MA	8,302.36
L,A	Fairhaven, MA	1,300.00
L,M	New Bedford, MA	1,253.76
L,M	Fairhaven, MA	2,108.44
M,Y	New Bedford, MA	5,698.22
M,H	Westport, MA	1,034.88
M,H	So. Dartmouth, MA	1,515.40
M,T	New Bedford, MA	1,300.00
M,A	New Bedford, MA	4,494.28
M,M	Fairhaven, MA	2,108.44
M,C	Fairhaven, MA	2,088.00
M,C	Acushnet, MA	1,015.00
M,J	Fairhaven, MA	1,580.00
M,M	New Bedford, MA	4,080.00
M,S	New Bedford, MA	3,700.00
N,C	New Bedford, MA	2,250.00
O,R	New Bedford, MA	2,412.00
P,A	So. Dartmouth, MA	1,369.99
P,M	Fairhaven, MA	4,235.53
P,L	New Bedford, MA	2,098.22
P,E	Fairhaven, MA	1,024.00
P,H	Fairhaven, MA	5,688.00
P,S	New Bedford, MA	2,415.00
P,D	New Bedford, MA	2,313.25
R,E	So. Dartmouth, MA	6,934.64
R,A	Fairhaven, MA	2,098.22
R,A	Dartmouth, MA	2,080.00
R,R	Fairhaven, MA	2,610.18
R,A	So. Dartmouth, MA	1,024.00
R,E	Fairhaven, MA	2,098.22
R,A	Acushnet, MA	2,880.00
S,S	So. Dartmouth, MA	1,300.00



ASSOCIATION FOR THE RELIEF OF AGED WOMEN, INC.

PAGE 11, PART XV, LINE 3A

OTHER INDIVIDUALS

APR 09 - MAR 10

S,E	Fairhaven, MA	3,308.44
S,L	Fairhaven, MA	2,108.44
S,A	New Bedford, MA	1,654.32
S,B	Fairhaven, MA	1,394.53
S,I	New Bedford, MA	4,120.00
S,B	New Bedford, MA	1,932.00
S,D	New Bedford, MA	2,098.22
T,D	Westport, MA	1,216.80
T,L	New Bedford, MA	1,807.21
T,M	New Bedford, MA	6,154.22
T,D	So. Dartmouth, MA	9,084.81
V,C	So. Dartmouth, MA	1,200.00
W,J	Fairhaven, MA	2,098.22
W,L	Fairhaven, MA	2,108.44
W,S	New Bedford, MA	2,088.00
W,C	Fairhaven, MA	4,329.47
Y,L	So. Dartmouth, MA	2,143.44
OTHERS		<u>22,701.86</u>
TOTAL PAYMENTS TO BENEFICIARIES		<u><u>\$295,319.63</u></u>

## 2009 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	COMPUTER	010607SL		5.00	16	1,470.			1,470.	662.		294.
2	CARPET	010107SL		2.00	16	1,890.			1,890.	1,890.		0.
3	COMPUTER EQUIPMENT	081409SL		5.00	16	1,090.			1,090.			145.
	* TOTAL 990-PF PG 1 DEPR					4,450.		0.	4,450.	2,552.	0.	439.