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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 JUL 1, 2009, and ending JUN 30, 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: **PATTONY FOUNDATION**

Number and street (or P O box number if mail is not delivered to street address): **CHOATE LLP P O BOX 961019**

Room/suite: **BOSTON, MA 02196**

City or town, state, and ZIP code: **BOSTON, MA 02196**

A Employer identification number: **04-3577440**

B Telephone number: **(617) 248-5255**

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

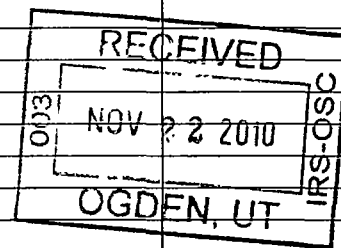
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16): **\$ 3,052,417.**

J Accounting method: ☒ 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))		(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	300,000.		N/A	
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	83.	83.		STATEMENT 1
	4 Dividends and interest from securities	63,413.	62,280.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-140,901.			
	b Gross sales price for all assets on line 6a	1,750,339.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 Total. Add lines 1 through 11	222,595.	62,363.		
	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 3	8,376.	0.		8,376.
	b Accounting fees STMT 4	5,200.	2,600.		2,600.
	c Other professional fees STMT 5	34,585.	25,939.		8,646.
	17 Interest				
	18 Taxes STMT 6	2,405.	1,605.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 7	125.	0.		125.
	24 Total operating and administrative expenses. Add lines 13 through 23	50,691.	30,144.		19,747.
	25 Contributions, gifts, grants paid				
	26 Total expenses and disbursements. Add lines 24 and 25	50,691.	30,144.		19,747.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	171,904.			
	b Net investment income (if negative, enter -0-)		32,219.		
	c Adjusted net income (if negative, enter -0-)			N/A	



19NE

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			
	2 Savings and temporary cash investments	184,823.	197,831.	197,831.
	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 ▶ 544,253.	STATEMENT 10		
	Less: allowance for doubtful accounts ▶	520,306.	544,253.	544,253.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 11	1,662,048.	1,656,029.	1,698,998.
	c Investments - corporate bonds STMT 12	230,011.	122,668.	109,180.
11 Investments - land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 13	349,029.	449,954.	502,155.	
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	2,946,217.	2,970,735.	3,052,417.	
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 type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	2,897,004.	2,924,105.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	49,213.	46,630.		
30 Total net assets or fund balances	2,946,217.	2,970,735.		
31 Total liabilities and net assets/fund balances	2,946,217.	2,970,735.		

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	2,946,217.
2 Enter amount from Part I, line 27a	2	171,904.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	26.
4 Add lines 1, 2, and 3	4	3,118,147.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 9	5	147,412.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,970,735.

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 STATEMENT ATTACHED	P	VARIOUS	VARIOUS
b SEE STATEMENT ATTACHED	P	VARIOUS	VARIOUS
c CAPITAL GAINS DIVIDENDS			
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 343,296.		220,207.	123,089.
b 1,407,013.		1,671,033.	-264,020.
c 30.			30.
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			123,089.
b			-264,020.
c			30.
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	-140,901.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	85,551.	1,786,387.	.047891
2007	116,569.	2,045,933.	.056976
2006	109,490.	1,740,561.	.062905
2005	7,819.	1,376,639.	.005680
2004	121,271.	1,133,413.	.106996

2 Total of line 1, column (d)	2	.280448
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	.056090
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	2,394,361.
5 Multiply line 4 by line 3	5	134,300.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	322.
7 Add lines 5 and 6	7	134,622.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	124,747.

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	644.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
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	644.
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	644.
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	1,225.	
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	1,225.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	581.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
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. \$ 0. (2) On foundation managers. \$ 0.		
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? 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) <u>MA</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>CHOATE HALL & STEWART LLP</u> Telephone no. ► <u>(617) 248-5255</u> Located at ► <u>TWO INTERNATIONAL PLACE, BOSTON, MA</u> ZIP+4 ► <u>02110</u>			
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 ► <u>15</u> <u>N/A</u>			

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

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

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

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☒ Yes ☐ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?☒

Organizations relying on a current notice regarding disaster assistance check here

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ 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
PATRICIA A. RUBBICCO	TRUSTEE			
CHOATE HALL & STEWART LLP TWO INT'L BOSTON, MA 02110	1.00	0.	0.	0.
ANTHONY F. RUBBICCO	TRUSTEE			
CHOATE HALL & STEWART LLP TWO INT'L BOSTON, MA 02110	1.00	0.	0.	0.
WILLIAM A. LOWELL	TRUSTEE			
CHOATE HALL & STEWART LLP TWO INT'L BOSTON, MA 02110	1.00	0.	0.	0.

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

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

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

0

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

	Amount
1 SCHOLARSHIP LOANS (NON-INTEREST BEARING) TO INDIVIDUALS	
	105,000.
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	105,000.

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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 2,305,609.
b	Average of monthly cash balances	1b 125,214.
c	Fair market value of all other assets	1c
d	Total (add lines 1a, b, and c)	1d 2,430,823.
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 2,430,823.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 36,462.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 2,394,361.
6	Minimum investment return. Enter 5% of line 5	6 119,718.

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	1 119,718.
2a	Tax on investment income for 2009 from Part VI, line 5	2a 644.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b
c	Add lines 2a and 2b	2c 644.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 119,074.
4	Recoveries of amounts treated as qualifying distributions	4 0.
5	Add lines 3 and 4	5 119,074.
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	7 119,074.

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 19,747.
b	Program-related investments - total from Part IX-B	1b 105,000.
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	4 124,747.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5 0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6 124,747.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				119,074.
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	46,698.			
b From 2005				
c From 2006	16,856.			
d From 2007	19,238.			
e From 2008				
f Total of lines 3a through e	82,792.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$	124,747.			
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				119,074.
e Remaining amount distributed out of corpus	5,673.			
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	88,465.			
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	46,698.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	41,767.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006	16,856.			
c Excess from 2007	19,238.			
d Excess from 2008				
e Excess from 2009	5,673.			

N/A

- b** Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(1)(3) or ☐ 4942(1)(5)

- (4) Gross investment income

[illegible]

10

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 NONE				
Total			▶ 3a	0.
b Approved for future payment NONE				
Total			▶ 3b	0.

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

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

[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		

Paid Preparer's Use Only	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 <i>William H. Stewart</i> Date 11/3/10	Title TRUSTEE
Preparer's signature <i>[Signature]</i> Firm's name (or yours if self-employed), address, and ZIP code CHOATE HALL & STEWART LLP P O BOX 961019 BOSTON, MA 02196	Date 11/9/10	Check if self-employed <input type="checkbox"/> Preparer's identifying number EIN Phone no. (617) 248-5255

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

PATTONY FOUNDATION**04-3577440**

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)() (enter number) organization

☐4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 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).

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions
for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

PATTONY FOUNDATION

04-3577440

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	ANTHONY F. & PATRICIA A. RUBBICCO CHOATE HALL & STEWART LLP TWO INTL PLACE BOSTON, MA 02110	\$ 300,000.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Employer identification number

04-3577440

[illegible]

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
BLACKROCK FEDERAL TRUST FUND	83.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	83.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS AND INTEREST FROM SECURITIES	63,443.	30.	63,413.
TOTAL TO FM 990-PF, PART I, LN 4	63,443.	30.	63,413.

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CHOATE HALL & STEWART LLP - LEGAL FEES RE SCHOLARSHIP LOAN PROGRAM	8,376.	0.		8,376.
TO FM 990-PF, PG 1, LN 16A	8,376.	0.		8,376.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CHOATE HALL & STEWART LLP - TAX PREPARATION FEE	5,200.	2,600.		2,600.
TO FORM 990-PF, PG 1, LN 16B	5,200.	2,600.		2,600.

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
CHOATE HALL & STEWART LLP - INVESTMENT MANAGEMENT, CUSTODY, RECORDKEEPING AND GRANT ADMINISTRATION	34,585.	25,939.		8,646.
TO FORM 990-PF, PG 1, LN 16C	34,585.	25,939.		8,646.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX ON NET INVESTMENT INCOME	800.	0.		0.
FOREIGN TAXES WITHHELD ON DIVIDENDS	1,605.	1,605.		0.
TO FORM 990-PF, PG 1, LN 18	2,405.	1,605.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FILING FEE FOR FORM PC	125.	0.		125.
TO FORM 990-PF, PG 1, LN 23	125.	0.		125.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
6/30/09 INTEREST AND DIVIDEND RECEIVED 7/2/09	26.
TOTAL TO FORM 990-PF, PART III, LINE 3	26.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	9
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DESCRIPTION	AMOUNT
EXCESS OF MARKET VALUE OVER COST OF DONATED SECURITIES - SEE STATEMENT	146,286.
6/30/10 INTEREST RECEIVED 7/2/10	11.
ADJUSTMENT FOR NON-TAXABLE RETURN OF CAPITAL DIVIDENDS	1,115.
TOTAL TO FORM 990-PF, PART III, LINE 5	147,412.

FORM 990-PF	OTHER NOTES AND LOANS RECEIVABLE	STATEMENT	10
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DESCRIPTION	BALANCE DUE	DOUBTFUL ACCT ALLOWANCE	FMV OF LOAN
VARIOUS - SEE STATEMENT ATTACHED	544,253.	0.	544,253.
TOTAL TO FM 990-PF, PART II, LN 7	544,253.	0.	544,253.

FORM 990-PF	CORPORATE STOCK	STATEMENT	11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	1,656,029.	1,698,998.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,656,029.	1,698,998.

FORM 990-PF	CORPORATE BONDS	STATEMENT 12
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	122,668.	109,180.
TOTAL TO FORM 990-PF, PART II, LINE 10C	122,668.	109,180.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 13
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ALTERNATIVE INVESTMENTS	COST	449,954.	502,155.
TOTAL TO FORM 990-PF, PART II, LINE 13		449,954.	502,155.

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT 14
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NAME OF MANAGER

PATRICIA A. RUBBICCO
ANTHONY F. RUBBICCO

PATTONY FOUNDATION
FORM 990-PF
EIN 04-3577440
June 30, 2010

DONATED SECURITIES RECEIVED JANUARY 13, 2010

<u>SECURITY</u>	<u>SHARES</u>	<u>COST</u>	<u>MARKET</u>	<u>EXCESS OF MKT OVER COST</u>
Cognizant Technology Solutions Cl A	600	10,915.74	28,887.00	17,971.26
Google Inc	40	10,937.00	23,245.60	12,308.60
J P Morgan Chase & Co	500	10,537.00	21,850.00	11,313.00
Lazard Emerging Markets I	4069.176	40,000.00	75,239.05	35,239.05
Lazard Emerging Markets I	5045.409	50,000.00	93,289.61	43,289.61
Lazard Emerging Markets I	2048.695	21,224.48	37,880.37	16,655.89
T Rowe Price Real Estate	1408.647	10,100.00	19,608.37	9,508.37
TOTAL		153,714.22	300,000.00	146,285.78

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CHOATE, HALL & STEWART LLP
STATEMENT OF CAPITAL GAINS AND LOSSES
THE PATTONY FOUNDATION

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TRUST YEAR ENDING 06/30/2010

TAX PREPARER. TPK
TRUST ADMINISTRATOR. EHV
INVESTMENT OFFICER: DBP

LEGEND F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
2025.1610 BRANDYWINE BLUE - 10532B101						
SOLD		07/06/2009	37647.74			
ACQ	2025.1610	07/02/2008	37647.74	66000.00	-28352.26	LT15
328 8390 BRANDYWINE BLUE - 10532B101						
SOLD		07/06/2009	6113 12			
ACQ	328 8390	08/28/2008	6113 12	10000 00	-3886 88	ST
400.0000 CHEVRONTXACO CORP COM - 166764100						
SOLD		07/06/2009	25555 34			
ACQ	400.0000	08/21/2003	25555 34	14618 00	10937.34	LT15
400.0000 CHEVRONTXACO CORP COM - 166764100						
SOLD		07/06/2009	25555 34			
ACQ	400.0000	02/24/2004	25555 34	17764 00	7791.34	LT15
166.4170 DODGE & COX STOCK - 256219106						
SOLD		07/06/2009	12439 67			
ACQ	166 4170	03/16/2009	12439 67	10000 00	2439 67	ST
602.1900 DODGE & COX STOCK - 256219106						
SOLD		07/06/2009	45013 70			
ACQ	602 1900	07/02/2008	45013 70	66000 00	-20986 30	LT15
400 0000 EXXON MOBIL CORP COM - 30231G102						
SOLD		07/06/2009	27120 78			
ACQ	400 0000	02/27/2003	27120 78	13736.00	13384 78	LT15
300.0000 EXXON MOBIL CORP COM - 30231G102						
SOLD		07/06/2009	20340 59			
ACQ	300 0000	07/06/2006	20340 59	19029.00	1311 59	LT15
745 8850 FIDELITY INTERNATIONAL DISCOVERY - 315910208						
SOLD		07/06/2009	18274 18			
ACQ	745 8850	03/16/2009	18274 18	14500 00	3774 18	ST
145 3910 FIDELITY INTERNATIONAL DISCOVERY - 315910208						
SOLD		07/06/2009	3562 08			
ACQ	145 3910	08/28/2008	3562.08	5000 00	-1437 92	ST
512.6820 FIDELITY INTERNATIONAL DISCOVERY - 315910208						
SOLD		07/06/2009	12560.71			
ACQ	512 6820	07/02/2008	12560.71	19000 00	-6439 29	LT15
2356.8230 FIDELITY INTERNATIONAL DISCOVERY - 315910208						
SOLD		07/06/2009	57742.16			
ACQ	2356 8230	06/29/2007	57742 16	100000.00	-42257.84	LT15
679 6550 FIDELITY INTERNATIONAL DISCOVERY - 315910208						
SOLD		07/06/2009	16651 55			
ACQ	679 6550	07/19/2007	16651 55	30000 00	-13348.45	LT15
500.0000 ISHARES MSCI EAFE - 464287465						
SOLD		07/06/2009	22485 37			
ACQ	500.0000	07/11/2005	22485 37	26570 00	-4084 63	LT15
200 0000 ISHARES MSCI EAFE - 464287465						
SOLD		07/06/2009	8994 15			
ACQ	200.0000	02/01/2006	8994.15	12614 00	-3619 85	LT15
500 0000 ISHARES MSCI EAFE - 464287465						
SOLD		07/06/2009	22485 37			
ACQ	500 0000	07/06/2006	22485.37	32618 00	-10132 63	LT15
200 0000 ISHARES MSCI EAFE - 464287465						
SOLD		07/06/2009	8994.15			
ACQ	200 0000	02/12/2007	8994 15	14870.00	-5875 85	LT15
1000 0000 ISHARES MSCI EAFE - 464287465						
SOLD		07/06/2009	44970 74			
ACQ	1000 0000	06/06/2008	44970 74	74823 60	-29852.86	LT15
656 2700 MFS INTERNATIONAL VALUE I - 55273E822						
SOLD		07/06/2009	13000 71			
ACQ	656 2700	03/16/2009	13000.71	10100 00	2900 71	ST
1724.7450 MFS INTERNATIONAL VALUE I - 55273E822						
SOLD		07/06/2009	34167.20			
ACQ	1724 7450	07/02/2008	34167 20	49000 00	-14832 80	LT15
523.0130 MFS INTERNATIONAL VALUE I - 55273E822						
SOLD		07/06/2009	10360 89			
ACQ	523 0130	02/20/2008	10360 89	15000 00	-4639 11	LT15
2454 1880 MFS INTERNATIONAL VALUE I - 55273E822						
SOLD		07/06/2009	48617 46			
ACQ	2454.1880	06/06/2008	48617.46	75000 00	-26382 54	LT15
2374 0000 MORGAN STANLEY FRONTIER MKTS - 61757P101						
SOLD		07/06/2009	24860 81			
ACQ	2374 0000	03/13/2009	24860.81	17448.42	7412 39	ST
856.0000 MORGAN STANLEY FRONTIER MKTS - 61757P101						
SOLD		07/06/2009	8964 14			
ACQ	856.0000	03/12/2009	8964.14	6287.32	2676.82	ST
300 0000 PROCTER & GAMBLE CO COM - 742718109						
SOLD		07/06/2009	15557 69			
ACQ	300.0000	08/21/2003	15557 69	13009 50	2548 19	LT15
50 0000 PROCTER & GAMBLE CO COM - 742718109						
SOLD		07/06/2009	2592 95			
ACQ	50.0000	03/22/2002	2592 95	2247 26	345 69	LT15
350 0000 PROCTER & GAMBLE CO COM - 742718109						
SOLD		07/06/2009	18150 64			
ACQ	350.0000	09/08/2000	18150.64	11008 13	7142 51	LT15
660 9640 SSGA EMERGING MARKETS - 784924425						
SOLD		07/06/2009	9841 75			
ACQ	660 9640	07/02/2008	9841 75	17000.00	-7158 25	LT15

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TRUST YEAR ENDING 06/30/2010

TAX PREPARER TPK
TRUST ADMINISTRATOR. EHV
INVESTMENT OFFICER. DBP

LEGEND: F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
358.6790 SSGA EMERGING MARKETS - 784924425						
SOLD		07/06/2009	5340 73			
ACQ	358 6790	02/20/2008	5340 73	10000.00	-4659 27	LT15
1578 1870 SSGA EMERGING MARKETS - 784924425						
SOLD		07/06/2009	23499 20			
ACQ	1578 1870	06/29/2007	23499 20	44000.00	-20500 80	LT15
703 2230 SSGA EMERGING MARKETS - 784924425						
SOLD		07/06/2009	10470 99			
ACQ	703 2230	06/06/2008	10470.99	20000 00	-9529 01	LT15
1390 1760 SSGA EMERGING MARKETS - 784924425						
SOLD		07/06/2009	20699.73			
ACQ	1390 1760	03/16/2009	20699.73	15000 00	5699 73	ST
600 0000 TEVA PHARMACEUTICAL INDS LTD ADR - 881624209						
SOLD		07/06/2009	29757 25			
ACQ	600 0000	03/22/2005	29757.25	17952 00	11805.25	LT15
350 0000 TEVA PHARMACEUTICAL INDS LTD ADR - 881624209						
SOLD		07/06/2009	17358 40			
ACQ	350.0000	04/30/2004	17358 40	11040.75	6317 65	LT15
25000 0000 CIT GROUP INC NOTE 7 750 4/02/12 - 125581AB4						
SOLD		07/13/2009	12700 00			
ACQ	25000 0000	07/15/2002	12700 00	26650 75	-13950 75	LT15
25000 0000 GENERAL MTRS ACCEP CORP DTD 11/13/2002 8 11/15/2017 - 37042GL95						
SOLD		07/24/2009	13200.00			
ACQ	25000 0000	11/04/2002	13200.00	25000 00	-11800 00	LT15
0000 TYCO INTL LTD - 902124106						
SOLD		07/28/2009	328 12			
ACQ			328 12		328.12	LT15
CHANGED 11/10/09 TTT						
0000 AMERICAN INTL GROUP INC COM NEW - 026874784						
SOLD		10/27/2009	131 90			
ACQ			131.90		131 90	LT15
CHANGED 11/10/09 TTT						
0000 AMERICAN INTL GROUP INC COM NEW - 026874784						
SOLD		10/27/2009	197 85			
ACQ			197 85		197 85	LT15
CHANGED 11/10/09 TTT						
25000 0000 FORD MTR CR CO GLOBAL LANDMARK SECS GLOBALS 7 375 - 345397SM6						
SOLD		10/28/2009	25000 00			
ACQ	25000 0000	07/15/2002	25000 00	25709.75	-709 75	LT15
2437 8350 FIDELITY MSCI EAFE I - 315911875						
SOLD		11/09/2009	83959 04			
ACQ	2437.8350	07/02/2008	83959.04	100000 00	-16040 96	LT15
233 5810 FIDELITY MSCI EAFE I - 315911875						
SOLD		11/09/2009	8044 53			
ACQ	233.5810	08/28/2008	8044 53	9109 67	-1065 14	LT15
4934 6160 VANGUARD S&P 500 - 922908496						
SOLD		11/09/2009	411596 32			
ACQ	4934 6160	07/02/2008	411596 32	473476 44	-61880 12	LT15
600 0000 COGNIZANT TECHNOLOGY SOLUTIONS CL A - 192446102						
SOLD		01/19/2010	28864 61			
ACQ	600 0000	12/01/2008	28864 61	10915.74	17948 87	LT15
151 0340 FIDELITY MSCI EAFE I - 315911875						
SOLD		01/19/2010	5228 80			
ACQ	151 0340	08/28/2008	5228 80	5890 33	-661.53	LT15
854 7130 FIDELITY MSCI EAFE I - 315911875						
SOLD		01/19/2010	29590 16			
ACQ	854 7130	07/08/2009	29590 16	22991 78	6598 38	ST
40 0000 GOOGLE INC - 38259P508						
SOLD		01/19/2010	23561 25			
ACQ	40.0000	12/01/2008	23561 25	10937 00	12624 25	LT15
50 0000 ISHARES CANADA - 464286509						
SOLD		01/19/2010	1331 98			
ACQ	50 0000	11/09/2009	1331 98	1297 11	34 87	ST
30 0000 ISHARES S&P SMALL CAP 600 - 464287804						
SOLD		01/19/2010	1698 28			
ACQ	30 0000	08/28/2008	1698 28	1942 18	-243.90	LT15
500 0000 J P MORGAN CHASE & CO COM - 46625H100						
SOLD		01/19/2010	21695 22			
ACQ	500 0000	01/21/2009	21695 22	10537 00	11158 22	ST
4785.8960 LAZARD EMERGING MARKETS I - 52106N889						
SOLD		01/19/2010	88969.81			
ACQ	4785.8960	03/16/2009	88969 81	47045 37	41924 44	ST
5045 4090 LAZARD EMERGING MARKETS I - 52106N889						
SOLD		01/19/2010	93794 15			
ACQ	5045 4090	01/21/2009	93794 15	50000 00	43794 15	ST
2048 6950 LAZARD EMERGING MARKETS I - 52106N889						
SOLD		01/19/2010	38085 24			
ACQ	2048 6950	12/01/2008	38085 24	21224 48	16860 76	LT15
20.0000 SPDR S&P 400 MID CAP - 595635103						
SOLD		01/19/2010	2722.17			
ACQ	20 0000	08/28/2008	2722.17	2994 48	-272 31	LT15
3000.0000 T ROWE PRICE REAL ESTATE - 779919109						
SOLD		01/19/2010	42270.00			
ACQ	3000 0000	07/02/2008	42270 00	52014 60	-9744.60	LT15
CHANGED 11/03/10 CLD						

ACCT 2YX6 856938014
FROM 07/01/2009
TO 06/30/2010

CHOATE, HALL & STEWART LLP
STATEMENT OF CAPITAL GAINS AND LOSSES
THE PATTONY FOUNDATION

PAGE 42

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TRUST YEAR ENDING 06/30/2010

TAX PREPARER: TPK
TRUST ADMINISTRATOR: EHV
INVESTMENT OFFICER: DBP

LEGEND: F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
160.0000 SPDR DJ WILSHIRE INTL REAL ESTATE - 78463X863						
SOLD		01/19/2010	5724.52			
ACQ 160 0000		06/30/2008	5724.52	7589 74	-1865 22	LT15
20 0000 SPDR BARCLAYS INTL TREASURY BOND - 78464A516						
SOLD		01/19/2010	1145.79			
ACQ 20 0000		06/30/2008	1145 79	1106.59	39 20	LT15
0000 BISYS GROUP INC - 055472104						
SOLD		03/01/2010	421.87			
ACQ			421 87		421.87	LT15
CHANGED 04/27/10 TTT						
.0000 MBIA INC COM - 55262C100						
SOLD		05/05/2010	154 02			
ACQ			154.02		154.02	LT15
CHANGED 06/07/10 CPH						
1330 0000 SPDR BARCLAYS INTL TREASURY BOND - 78464A516						
SOLD		06/03/2010	70145.54			
ACQ 1330 0000		06/30/2008	70145.54	73588.51	-3442.97	LT15
30000.0000 GOLDMAN SACHS & CO DTD 6/28/2005 4.5% 6/15/2010 - 38143UBEO						
SOLD		06/15/2010	30000.00			
ACQ 30000 0000		07/13/2005	30000 00	29982 00	18 00	LT15
TOTALS			1750308.45	1891239 50		

S/T 343,295.74 220,207.00 123,088.76
L/T 1,407,012.69 1,671,032.50 (264,019.81)

Statement of Assets

Account: 856938014

The Pattony Foundation

Dated September 28, 2001

As of 6/30/2010

CHOATE

CHOATE HALL & STEWART LLP
Two International Place | Boston, MA 02110

Symbol	Asset Description	Maturity Date	Units/Shares or Face Value	Total Cost	Market Price	Market Value
012 Exchange Traded Fund						
EWC	iShares Canada		1,625 0000	\$34,778 39	\$24 87	\$40,413 75
IVV	iShares S&P 500		3,059 0000	\$343,214 04	\$103 46	\$316,484 14
IJR	iShares S&P Small Cap 600		990 0000	\$53,511 36	\$54 14	\$53,598 60
MDY	Spdr S&P Midcap 400 ETF Tr Unit Ser 1 Standard & Poors Dep Rcpt		735 0000	\$92,288 26	\$129 16	\$94,932.60
VEA	Vanguard Europe Pacific Equities		7,300 0000	\$258,990 86	\$29 24	\$213,452 00
VSS	Vanguard FTSE All-World ExUSA Small Cap		460 0000	\$32,050 28	\$75 39	\$34,679 40
VWO	Vanguard Emerging Mkts		1,920 0000	\$62,356 87	\$37 99	\$72,940 80
DGS	Wisdomtree Emerging Mkts Small Cap		640 0000	\$28,774 40	\$40 33	\$25,811 20
			Total	\$905,964 46		\$852,312 49
040 Equity Mutual Funds						
CHTVX	Invesco Charter Fund		5,338 2180	\$81,570 00	\$14 24	\$76,016 23
VIFSX	Vanguard S&P 500		4,629 5130	\$318,223 56	\$78 40	\$362,953 82
			Total	\$399,793 56		\$438,970 05
100 International Equity Mutual Funds						
FSIVX	Fidelity MSCI EAFE I		9,253 0940	\$248,908 22	\$28 72	\$265,748 86
LZEMX	Lazard Emerging Markets I		4,369 7490	\$42,954 63	\$17 39	\$75,989 93
			Total	\$291,862 85		\$341,738 79
200 Corporate Bonds						
D 13	Dominion Res Inc Va New Dtd 3/6/2003 5% 3/15/2013	3/15/2013	25,000 0000	\$23,940 50	\$108 26	\$27,066 05
38143UAB7	Goldman Sachs Group Inc Dtd 1/13/2004 5 15% 1/15/2014	1/15/2014	25,000 0000	\$24,987 50	\$104 70	\$26,175 90
LEHZ10	Lehman Bros Hldgs Inc Mtn Dtd 11/21/2003 4 375% 11/30/2010	11/30/2010	25,000 0000	\$24,250 00	\$19.75	\$4,937 50
WMT 11	Wal Mart Stores Inc Dtd 2/18/2004 4 125% 2/15/2011	2/15/2011	50,000.0000	\$49,490 00	\$102 00	\$51,000 70
			Total	\$122,668 00		\$109,180 15
305 Fixed Income Mutual Fund						
PTTRX	Pimco Total Return		1,251 1850	\$13,200 00	\$11 26	\$14,088 34
			Total	\$13,200 00		\$14,088 34
500 Money Market Funds						
09248U874	Blackrock Federal Trust Fund		196,281 0200	\$196,281 02	\$1 00	\$196,281 02
			Total	\$196,281 02		\$196,281 02

Statement of Assets

Account: 856938014

The Pattony Foundation

Dated September 28, 2001

As of 6/30/2010

CHOATE

CHOATE HALL & STEWART LLP
Two International Place | Boston, MA 02110

Symbol	Asset Description	Maturity Date	Units/Shares or Face Value	Total Cost	Market Price	Market Value
900 Alternative						
FFD	Morgan Stanley Frontier Mkts		2,270 0000	\$16,684 05	\$11 32	\$25,705 25
RWX	SPDR DJ Wilshire Intl Real Estate		840 0000	\$28,524.56	\$31.17	\$26,182.80
			Total	\$45,208 61		\$51,888 05
901 Alternative						
CRSOX	Credit Suisse Commodity Return		16,952 9110	\$131,360 00	\$7 77	\$131,724 12
299908830	Evergreen Intl Bond Fund Cl I		6,584 0590	\$70,383 59	\$10 87	\$71,568 72
MEDIX	MFS Emerging Markets Debt		8,911 4290	\$112,240 00	\$14 25	\$126,987 86
TRIAX	T Rowe Price Africa & Mid East I		15,120 3010	\$74,000 00	\$5 26	\$79,532 78
TRREX	T Rowe Price Real Estate		6,412 6200	\$61,970 00	\$14 40	\$92,341 73
			Total.	\$449,953 59		\$502,155 21
Grand Total				\$2,424,932.09		\$2,506,614 10

Balances From #856939012

U.S. Govt Obligations Tax Managed Fund
Loans and Notes Receivable

1,550.00
544,252.87
2,970,734.96

1,550.00
544,252.87
3,052,416.97

Statement of Assets

Account: 856939012

The Pattony Foundation
Promissory Notes Tracking Account

As of 6/30/2010

Symbol	Asset Description	Maturity Date	Units/Shares or Face Value	Total Cost	Market Price	Market Value
500 Money Market Funds						
60934N856	US Govt Obligations Tax Managed Fund		1,550.0000	\$1,550 00	\$1 00	\$1,550 00
			Total:	\$1,550 00		\$1,550 00
640 Loans & Notes Receivable						
998001AC5	Butler, Sarah, \$15,000 Note Dated 8/16/2002		4,500 0000	\$4,500 00	\$0 00	\$4,500 00
998001AD3	Montanez, Amanda, \$4,430 Note Dated 8/12/2002		1,550 6300	\$1,550 63	\$0 00	\$1,550 63
998001AH4	Fiore, Matthew, \$7,000 Note Dated 6/24/2003		3,499 8800	\$3,499 88	\$0 00	\$3,499 88
998001AI2	Howell, Dana Marie, \$5,000 Note Dated 6/27/2003		833 5000	\$833 50	\$0 00	\$833 50
998001AL5	Flint, Carrie Leigh, \$15,000 Note Dated 7/10/2003		15,000 0000	\$15,000 00	\$0 00	\$15,000 00
998001AP6	Jarmusik, Brian Riley, \$7,000 Note Dated 6/30/2003		3,616.5500	\$3,616 55	\$0 00	\$3,616 55
998001AQ4	Kontos, Marina, \$5,000 Note Dated 7/14/2003		2,500 0900	\$2,500 09	\$0 00	\$2,500 09
998001AT8	Comstock, Desiree, \$5,000 Note Dated 7/21/2004		5,000.0000	\$5,000 00	\$0 00	\$5,000 00
998001AW1	Flint, Carrie Leigh, \$10,000 Note Dated 7/18/2004		3,499 8700	3,499.87	\$0 00	3,499.87
998001BF7	Quilling, Mark, \$7,500 Note Dated 7/9/2004		4,625 0000	\$4,625 00	\$0 00	\$4,625 00
998001BI1	Valcour, Kerrie, \$7,500 Note Dated 7/28/2004		625.0000	\$625 00	\$0 00	\$625 00
998001BJ9	Woodberry, Karen, \$5,000 Note Dated 7/13/2004		2,500 1000	\$2,500 10	\$0 00	\$2,500 10
998622AC0	Aiello, Casey L , \$8,000 Note Dated July 12, 2007		8,000.0000	\$8,000 00	\$0 00	\$8,000 00
998622AP1	Portalewska, Agnes, \$7,500 00 Note Dated July 12, 2006		5,750.0000	5,750.00	\$0 00	5,750.00
998622CA8	Aiello, Casey L , \$8,000 Note Dated July 16, 2009		8,000 0000	\$8,000.00	\$0 00	\$8,000 00
998622CA9	Clark, Meghan E , \$10,000 Note Dated August 1, 2009		10,000 0000	\$10,000.00	\$0 00	\$10,000 00
998622CB4	Lavorgna, Jacqueline, \$7,000 Note Dated July 21, 2009		7,000 0000	\$7,000 00	\$0 00	\$7,000 00
998622CB6	Lincourt, Justin H , \$10,000 Note Dated July 17, 2009		10,000 0000	\$10,000 00	\$0 00	\$10,000 00
998622CB7	Masenan, Jay D , \$10,000 Note Dated July 30, 2009		10,000 0000	\$10,000 00	\$0 00	\$10,000 00
998622CB8	Masenan, Jenna L , \$10,000 Note Dated July 30, 2009		10,000 0000	\$10,000 00	\$0.00	\$10,000 00
998622CB9	Sainte, Jr , Steven L , \$10,000 Note Dated July 24, 2009		10,000 0000	\$10,000 00	\$0 00	\$10,000 00
998622CC2	Thibault, Adam B , \$10,000 Note Dated July 22, 2009		10,000 0000	\$10,000 00	\$0 00	\$10,000 00

Statement of Assets

Account: 856939012

The Pattony Foundation

Promissory Notes Tracking Account

As of 6/30/2010



CHOATE HALL & STEWART LLP
Two International Place | Boston MA 02110

Symbol	Asset Description	Maturity Date	Units/Shares or Face Value	Total Cost	Market Price	Market Value
998622CC3	Zuniga, Julie Anne, \$10,000 Note Dated July 23, 2009		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622CD0	Aiello, Casey L, \$8,000 Note Dated July 16, 2008		8,000 0000	\$8,000.00	\$0.00	\$8,000.00
998622CD1	Butler, Stephen F, \$10,000 Note Dated July 31, 2008		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622CD2	Clark, Meghan E, \$10,000 Note Dated July 20, 2008		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622CD3	Lee, Nicole J, \$8,000 Note Dated July 28, 2008		8,000 0000	\$8,000.00	\$0.00	\$8,000.00
998622CD4	Maserian, Jenna L, \$10,000 Note Dated July 31, 2008		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622CD5	Pino, Anna-Maria, \$5,000 Note Dated July 31, 2008		5,000 0000	\$5,000.00	\$0.00	\$5,000.00
998622CD6	Robblee, Christopher, \$5,000 Note Dated August 13, 2008		5,000 0000	\$5,000.00	\$0.00	\$5,000.00
998622CD7	Woodberry, Kristin A, \$10,000 Note Dated July 15, 2008		9,600 0000	\$9,600.00	\$0.00	\$9,600.00
998622CF0	Flint, Carrie Leigh, \$10,000 Note Dated July 16, 2005		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622CR0	Robblee, Christopher, \$10,000.00 Note Dated July 14, 2006		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622CV0	Vincent, Caitlin, \$5,000.00 Note Dated July 22, 2006		4,500 0200	\$4,500.02	\$0.00	\$4,500.02
998622JD3	DiCarlo, Janelle, \$5,000 Note Dated July 11, 2007		5,000 0000	\$5,000.00	\$0.00	\$5,000.00
998622JD8	DiCarlo, Jenalee \$20,500 Note		18,791.6500	\$18,791.65	\$0.00	\$18,791.65
998622JL0	LaVita, Jenna, \$5,000 Note Dated July 12, 2005		3,916 7100	\$3,916.71	\$0.00	\$3,916.71
998622JM4	Maserian, Jenna L, \$8,000 Note Dated August 1, 2007		8,000 0000	\$8,000.00	\$0.00	\$8,000.00
998622KM0	Maserian, Kayla R, \$10,000 Note Dated August 1, 2007		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622LM0	Paulin, Laura Marie, \$10,000 Note Dated July 30, 2007		6,999 9400	\$6,999.94	\$0.00	\$6,999.94
998622MC0	Clark, Meghan E, \$8,000 Note Dated July 9, 2007		8,000 0000	\$8,000.00	\$0.00	\$8,000.00
998622MG0	Glick, Matthew, \$14,000 Note Combines Notes Dated June 30, 2003 For \$9,000 And July 30, 2004 For \$5,000		13,066 6800	\$13,066.68	\$0.00	\$13,066.68
998622MG1	Lee, Tiffany M, \$32,500 Note Combines Notes Dated July 22, 2004 For \$7,500, July 15, 2005 For \$10,000, July 22, 2006 For \$10,000 And August 11, 2007 For \$5,000		23,291 6100	\$23,291.61	\$0.00	\$23,291.61

Statement of Assets

Account: 856939012

The Pattony Foundation

Promissory Notes Tracking Account

As of 6/30/2010



Symbol	Asset Description	Maturity Date	Units/Shares or Face Value	Total Cost	Market Price	Market Value
998622MG2	Lynch, Benjamin James, \$32,500 Note Combines Notes Dated June 30, 2004 For \$7,500, July 16, 2004 For \$5,000, July 17, 2006 For \$10,000 And July 17, 2007 For \$10,000		22,749 9400	22,749.94	\$0.00	22,749.94
998622MG3	O'Farrell, Brittany L, \$30,000 Note Combines Notes Dated June 30, 2004 For \$7,500, June 30, 2005 For \$7,500, July 14, 2006 For \$7,500 And July 8, 2007 For \$7,500		20,500 0000	20,500.00	\$0.00	20,500.00
998622MG4	Rojas, Peter, \$11,000 Note Combines Notes Dated August 28, 2004 For \$6,000 And July 12, 2005 For \$5,000		7,333 3800	7,333.38	\$0.00	7,333.38
998622MH2	Hurkett, Molly Rose, \$10,000 Note Dated August 17, 2009		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622MH3	Hurkett, Peter, \$10,000 Note Dated August 17, 2009		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622NL0	Lee, Nicole J, \$10,000 Note Dated August 11, 2007		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622NR0	Rahav, Noaa, \$5,000 Note Dated July 1, 2005		1,500 1400	\$1,500.14	\$0.00	\$1,500.14
998622RL0	Lamb, Robin P, \$5,000 Note Dated July 20, 2007		3,493 3900	\$3,493.39	\$0.00	\$3,493.39
998622RT0	Turesky, Rachel, \$10,000.00 Note Dated July 13, 2006		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622SB0	Butler, Stephen F., \$10,000 Note Dated August 13, 2007		10,000 0000	\$10,000.00	\$0.00	\$10,000.00
998622SM0	Marrotto, Sabrina, \$7,500 Note Dated June 19, 2005		2,250 0000	\$2,250.00	\$0.00	\$2,250.00
998622SP9	Pugliese, Sasha \$15,000 Note		13,500 0000	13,500.00	\$0.00	13,500.00
998622UV0	Ullrich, Valerie, \$10,000 Note Dated July 8, 2005		5,333 2400	\$5,333.24	\$0.00	\$5,333.24
998662SS1	Dyer, Susan Marie, \$25,000 Note		12,500.2000	\$12,500.20	\$0.00	\$12,500.20
998662SS2	Lee, Victor, \$34,500 Note		16,675 0000	\$16,675.00	\$0.00	\$16,675.00
998662SS3	McLaughlin, John R, \$24,500 Note		9,000 0000	9,000.00	\$0.00	9,000.00
998662SS4	Neeb, Christine V, \$22,500 Note		11,250 0000	\$11,250.00	\$0.00	\$11,250.00
998662SS5	O'Farrell, Courtney, \$27,500 Note		12,833 4400	\$12,833.44	\$0.00	\$12,833.44
998662SS6	Pugliese, Jeffrey, \$10,000 Note		4,666.8800	4,666.88	\$0.00	4,666.88
998662SS7	Sciascia, Timothy, \$20,000 Note		17,000 0300	\$17,000.03	\$0.00	\$17,000.03
Total				544,252.87		544,252.87
Grand Total.	Total Original Amount			545,802.87		545,802.87
	\$572,930.00					

Statement of Assets

Account: 856939012

The Pattony Foundation

Promissory Notes Tracking Account

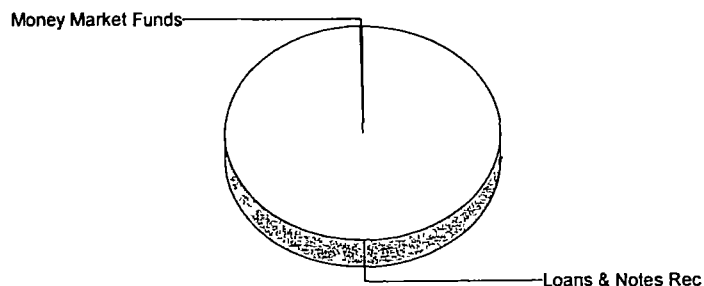
As of 6/30/2010



CHOATE HALL & STEWART LLP
Two International Place | Boston MA 02110

Symbol	Asset Description	Maturity Date	Units/Shares or Face Value	Total Cost	Market Price	Market Value
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Market Value by Asset Type



Loans & Notes Rec	99.7%
Money Market Funds	0.3%
Non-Int Brg Acct-Own Inst	0.0%
Total	100.0%

THE PATTONY FOUNDATION
CHECK LIST OF REQUIREMENTS FOR SUBMITTING
STUDENT LOAN APPLICATION

This check list is intended only as a "check list" and has been included to assist in keeping track of the application requirements which need to be completed.

- ☐ 1. **Application filled in completely**
 - _____ Background Information (Section A)
 - _____ Financial Aid Information (Section B)
 - _____ Leadership and Personal Qualities (Section C)
 - _____ Academic Information (Section D)
 - _____ Additional Information (Section E)
 - _____ Certification and Signatures (Section F)
- ☐ 2. **Acceptance Letter** (Section A) *
- ☐ 3. **Character Reference** (Section A) *
- ☐ 4. **Financial Award Letter and/or SAR** (Section B1)
- ☐ 5. **School Literature** (Section B2) *
- ☐ 6. **Form 4506-T – Request for Transcript of Tax Return** (Section B4 or B5)
- ☐ 7. **Resume of Activities** (Section C1)
- ☐ 8. **Essay** (Section C2)
- ☐ 9. **Scholastic Reference Letter** (Section C3)
- ☐ 10. **Official Transcript** (Section D1)

Loans are made to the **student applicant only** (not the parents, the school or outside agencies).

It is important that you follow these instructions carefully - your ability to follow these instructions is a factor taken into consideration by the Foundation Trustees when selecting loan recipients.

The application form **MUST BE FILLED IN COMPLETELY** by the student applying for the loan with all the requested information. If a particular question or section is not applicable to you, indicate either "*Not Applicable*", "*No*" or "*None*".

Recipients must notify the Foundation if any of the following changes have occurred: change of graduation date; change of school; change of major; change of address or change of telephone number.

(*) Students who have previously received funds from the Foundation **DO NOT** need to complete these sections

THE PATTONY FOUNDATION

Educational Loan Application for School Year 2010-2011

The Pattony Foundation provides interest-free loans to help students finance their education. Loans range in amounts from \$1,000 to \$10,000. The Foundation makes interest-free loans rather than outright grants because it believes that it is important for students to invest in their own education.

Selection Criteria

In order to qualify as an applicant, you must meet the following criteria:

- Have graduated or be about to graduate from a high school or college located in New England (i.e., the states of Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, or Vermont).
- Be enrolled or enrolling in an accredited post-secondary institution.
- Demonstrate, in order of most to least important, the following: financial need; character, motivation and leadership skills; and academic promise.
- Complete and submit this application with the required attachments, prior to the deadline listed below.

In order to receive the interest-free loan, if selected:

- Dependent students: you and your parents will be required to sign a promissory note agreeing to repay the loan (without interest).
- Independent students: you will be required to sign a promissory note agreeing to repay the loan (without interest).

The terms of the loan (e.g., length of time to repay, frequency and amount of payments, etc.) will depend on your particular circumstances. Those terms will be determined in consultation with you at the time of your selection.

* Applicants who have qualified and received interest-free loan(s) from the Foundation in prior year(s) may be eligible to apply for additional loans in succeeding year(s) *

Deadline

Your completed application and attachments must arrive in one envelope at the address listed below no later than **May 31, 2010**. Applicants selected to receive a loan will be notified on or about July 31, 2010.

Mail three (3) copies of the completed application together with three (3) copies of the required attachments in one envelope to:

The Pattony Foundation
c/o William A. Lowell
Choate, Hall & Stewart LLP
Two International Place
Boston, Massachusetts 02110

Please contact Eileen Vincent at (617) 248-4868 if you have any questions concerning the application or submission process.

THE PATTONY FOUNDATION EDUCATIONAL LOAN APPLICATION

Please type or print legibly in black or blue ink.

A. Background Information

Name: _____
Social Security No.: _____
Birth Date: _____
Permanent Address: _____

Telephone: _____
E-mail: _____

Please provide the address and phone number for the best place to contact you, if different from above:

Address: _____
Telephone: _____

High School

Graduated: Yes/No (circle one)

If yes, date of graduation: _____ If no, expected date of graduation: _____

Name, City and State of High School: _____

Post-Secondary Institution, if applicable

Graduated: Yes/No (circle one)

If yes, date of graduation: _____ If no, expected date of graduation: _____

Name, City and State of Institution: _____

Post-Secondary or Graduate Institution, for Loan Request

Name, City and State of Institution: _____

Loan Amount Requested: \$ _____, Not to exceed \$10,000.
(The Foundation reserves the right to award less than the amount you request.)

Enrollment Status:

In Fall 2010,

I am: Accepted/Enrolled/Awaiting a Decision (*circle one*)
If applicable, attach copy of Acceptance Letter

I will be a: Freshman/Sophomore/Junior/Senior/Graduate Student (*circle one*)
Full-time/Part-time (*circle one*)

My expected graduation date is: _____

My intended field of study and degree are: _____

My housing status is: On Campus/Off Campus/Home with Family (*circle one*)

Character Reference:

Attach a reference letter from someone who will know your address after graduation. (Personal friends, neighbors, employers, clergy, etc.)

**** Immediate family and persons from the academic field may not be used ****

B. Financial Aid Information

(1) **Financial Aid:**

If you have **NOT** applied for financial aid, check this box ☐

If you **HAVE** applied for financial aid, please attach the following documents:

- Copy of the financial aid award letter from the college or institution of higher education you will be attending (if you are undecided, please send award letters from your top two choices)
- Copy of your final Student Aid Report (SAR);
"Information Acknowledgement 2009-2010 Student Aid Report Federal Student Aid Programs"

(2) **Budget** (*Attach Official School Brochure or Letter Showing Costs of Tuition, Room & Board, Etc*)

Budget for Academic Year

Tuition/Fees	\$ _____
Room/Board	\$ _____
Books	\$ _____
Travel	\$ _____
Other	\$ _____
Total	\$ _____

Your Resources for Academic Year

Given by Family	\$ _____
Your Own Resources	\$ _____
Wages (if any)	\$ _____
Scholarships (if any)	\$ _____
Other Loans (if any)	\$ _____
Total	\$ _____

(3) Educational Indebtedness:

Total student loans owed to date - please list sources, interest rate and repayment terms. Include any previous loans from this Foundation. Estimate your total debt upon completion of your studies/graduation.

(4) Financial Resources – Dependent Student:

Parental Information:

Complete this question using information from the most recent U.S. Income Tax Return. (A completed Form 4506-T – Request for Transcript of Tax Return must also be included)

Father - Name and Occupation: _____

Mother - Name and Occupation: _____

Adjusted Gross Income: \$ _____ (Amount from Father \$ _____)
(Amount from Mother \$ _____)

Number of Family Members _____ Number of Dependents _____

List all family members supported at least half-time by parents, not including student applicant.

Name/age	School/tuition	Relationship to Applicant
Name/age	School/tuition	Relationship to Applicant
Name/age	School/tuition	Relationship to Applicant
Name/age	School/tuition	Relationship to Applicant

(5) Financial Resources - Independent Student:

Complete this question about you and your spouse (if applicable) using information from your most recent U.S. Income Tax Return.

(A completed Form 4506-T—Request for Transcript of Tax Return must also be included)

Adjusted Gross Income: \$ _____ (Amount from Student \$ _____)
(Amount from Spouse \$ _____)

List all family members that you support at least half-time, **not** including yourself.

Name/age	School/tuition	Relationship to Applicant
Name/age	School/tuition	Relationship to Applicant
Name/age	School/tuition	Relationship to Applicant

(6) Special Circumstances

- Do you have any unusual personal, financial, or family circumstances that warrant special attention? Please be specific.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

C. Leadership And Personal Qualities

- (1) Resume/Activities: Please attach a resume or list of activities that you participate in including positions held, dates of participation, estimated time spent on each activity and any special honors received.

- (2) Essay:

If you are going to be a college freshman in the fall –

Submit an essay describing your educational goals, why you selected a particular college, efforts you have made to finance your education, and general information about yourself.

If you are a first-time applicant and you are already enrolled in college or graduate school or you will be attending graduate school in the fall –

Submit **one** of the following:

- either an essay describing your educational goals, why you selected a particular college, efforts you have made to finance your education, and general information about yourself.
- or answer the following questions (no more than 500 words): If you had no external pressures (i.e., no need to make money, no need to live in any particular place, etc.), what career would you choose? why?

If you have previously received a loan from the Pattony Foundation –

Submit an essay of no more than 300 words and describe what the funding you have received has meant to you and your family.

- (3) Optional:

Submit a letter of recommendation that addresses your leadership skills and potential. You may submit the letter directly or have the person writing the recommendation send it directly to the Pattony Foundation.

D. Academic Information

- (1) Submit an official copy of your most recent transcript; high school, college, or graduate school.

E. Additional Information

- (1) Will you be the first person in your family to pursue a post-secondary education?

☐ Yes

☐ No

- (2) How did you hear about the interest-free loans from the Pattony Foundation?

F. CERTIFICATION AND SIGNATURES

I (we) certify that the information on this form is true and complete to the best of my (our) knowledge. I (we) shall provide on request any information required to verify statements made in this application. I (we) realize that if I (we) do not comply with requests for information, eligibility for loans will be lost. I (we) further agree that, if the Pattony Foundation selects me to receive an interest-free loan, I (we) will execute a promissory note to repay the loan.

Signature of Applicant

Date

Signature of Applicant's Mother, if applicant is a dependent

Date

Signature of Applicant's Father, if applicant is a dependent

Date

Mail three (3) copies of the completed application together with three (3) copies of the required attachments in one envelope to:

The Pattony Foundation
c/o William A. Lowell
Choate, Hall & Stewart LLP
Two International Place
Boston, Massachusetts 02110

Your envelope must arrive no later than May 31, 2010

*Please **do not** staple the application or attachments, and include your name
on all materials submitted*

Request for Transcript of Tax Return

OMB No. 1545-1872

► Request may be rejected if the form is incomplete or illegible.

Tip. Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can also call 1-800-829-1040 to order a transcript. If you need a copy of your return, use **Form 4506, Request for Copy of Tax Return**. There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first.	1b First social security number on tax return or employer identification number (see instructions)
2a If a joint return, enter spouse's name shown on tax return.	2b Second social security number if joint tax return

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code

4 Previous address shown on the last return filed if different from line 3

5 If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number. The IRS has no control over what the third party does with the tax information.

The Pattony Foundation, c/o Choate, Hall & Stewart, LLP
P. O. Box 961989
Boston, MA 02196-1989

Caution. If the transcript is being mailed to a third party, ensure that you have filled in line 6 and line 9 before signing. Sign and date the form once you have filled in these lines. Completing these steps helps to protect your privacy.

- 6 Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ► 1040
- a Return Transcript**, which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120A, Form 1120H, Form 1120L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days ☐
- b Account Transcript**, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 30 calendar days. ☐
- c Record of Account**, which is a combination of line item information and later adjustments to the account. Available for current year and 3 prior tax years. Most requests will be processed within 30 calendar days ☐
- 7 Verification of Nonfiling**, which is proof from the IRS that you **did not** file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days ☐
- 8 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2007, filed in 2008, will not be available from the IRS until 2009. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 45 days ☐

Caution. If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed upon your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

- 9 Year or period requested.** Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately.

12/31/2009

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, either husband or wife must sign. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. **Note.** For transcripts being sent to a third party, this form must be received within 120 days of signature date.

Telephone number of taxpayer on line 1a or 2a

Sign Here

Signature (see instructions)

Date

Title (if line 1a above is a corporation, partnership, estate, or trust)

Spouse's signature

Date