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

OMB No 1545-0052

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 Wheelwright Scientific School		A Employer identification number 04-6004390
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite C/O Anna Makos 81 State Street, PO Box 510		B Telephone number (see the instructions) (978) 462-2344
	City or town State ZIP code Newburyport MA 01950		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, column (c), line 16) \$ 2,983,702.		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) (see the instructions).)		(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 (att sch)				
	2 Ck <input checked="" type="checkbox"/> if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	140.	140.	140.	
	4 Dividends and interest from securities	74,731.	74,731.	74,731.	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10	-6,473.			
	b Gross sales price for all assets on line 6a	120,112.			
	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				
b Less Cost of goods sold					
c Gross profit/(loss) (att sch)					
11 Other income (attach schedule) See Line 11 Stmt	1,933.	1,433.	1,933.		
12 Total. Add lines 1 through 11	70,331.	76,304.	76,804.		
ADMINISTRATIVE AND OPERATING EXPENSES	13 Compensation of officers, directors, trustees, etc	48,400.	4,840.	4,840.	43,560.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch) L-16b Stmt	8,308.	4,154.	4,154.	4,154.
	c Other prof fees (attach sch) L-16c Stmt	21,880.	19,680.	19,680.	2,200.
	17 Interest				
	18 Taxes (attach schedule)(see instr) State filing fees	35.	0.	0.	35.
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) See Line 23 Stmt	2,254.	0.	0.	2,254.
	24 Total operating and administrative expenses. Add lines 13 through 23	80,877.	28,674.	28,674.	52,203.
	25 Contributions, gifts, grants paid	108,000.			108,000.
26 Total expenses and disbursements. Add lines 24 and 25	188,877.	28,674.	28,674.	160,203.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-118,546.				
b Net investment income (if negative, enter -0-)		47,630.			
c Adjusted net income (if negative, enter -0-)			48,130.		

4

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
ASSETS	1	Cash — non-interest-bearing				
	2	Savings and temporary cash investments	475,054.	169,430.	169,430.	
	3	Accounts receivable				
		Less: allowance for doubtful accounts				
	4	Pledges receivable				
		Less: allowance for doubtful accounts				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)				
	7	Other notes and loans receivable (attach sch)				
		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 (attach schedule)				
	b	Investments — corporate stock (attach schedule) L-10b Stmt	1,714,927.	1,902,005.	1,929,735.	
	c	Investments — corporate bonds (attach schedule) L-10c Stmt	832,705.	832,705.	884,537.	
	LIABILITIES	11	Investments — land, buildings, and equipment: basis			
		Less: accumulated depreciation (attach schedule)				
12		Investments — mortgage loans				
13		Investments — other (attach schedule)				
14		Land, buildings, and equipment basis				
		Less: accumulated depreciation (attach schedule)				
15		Other assets (describe)				
16		Total assets (to be completed by all filers — see instructions. Also, see page 1, item i)	3,022,686.	2,904,140.	2,983,702.	
17		Accounts payable and accrued expenses				
18		Grants payable				
19	Deferred revenue					
20	Loans from officers, directors, trustees, & other disqualified persons					
21	Mortgages and other notes payable (attach schedule)					
22	Other liabilities (describe)					
23	Total liabilities (add lines 17 through 22)					
NET ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>					
	27	Capital stock, trust principal, or current funds	3,022,686.	2,904,140.		
	28	Paid-in or capital surplus, or land, building, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances (see the instructions)	3,022,686.	2,904,140.			
31	Total liabilities and net assets/fund balances (see the instructions)	3,022,686.	2,904,140.			

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	3,022,686.
2	Enter amount from Part I, line 27a	2	-118,546.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	2,904,140.
5	Decreases not included in line 2 (itemize)	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	2,904,140.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a Public traded securities				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 120,112.		126,585.	-6,473.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			-6,473.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss).	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>		2	-6,473.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8 </div>		3	

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 the instructions before making any entries.			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2008			
2007			
2006			
2005			
2004			

2 Total of line 1, column (d)	2	
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	
8 Enter qualifying distributions from Part XII, line 4	8	

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

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

1 a 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 instr.)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	953.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	953.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	953.
6 Credits/Payments:			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	7,152.	
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	7,152.	
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	6,199.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax	11	6,199.	Refunded

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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 the instructions for definition)? <i>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.</i>		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"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		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? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a 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? <i>If 'Yes,' attach the statement required by General Instruction T</i>		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? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) <u>MA - Massachusetts</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 <i>General Instruction G</i> ? <i>If 'No,' attach explanation</i>	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)? <i>If 'Yes,' complete Part XIV.</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

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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 .. <u>N/A</u>	13	X	
14	The books are in care of <u>Anna Makos</u> Telephone no. <u>(978) 462-2344</u> Located at <u>81 State Street</u> <u>Newburyport</u> <u>MA</u> ZIP + 4 <u>01950</u>			
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 <u>15</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
1 a 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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1 b	
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?	1 c	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 <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
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 the instructions)	2 b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
3 a 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)	3 b	
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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?	4 b	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)? (see instructions)

☐ Yes ☒ No

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

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

5b

Organizations relying on a current notice regarding disaster assistance check here.

☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?☐ Yes ☐ No

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

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

6b

If 'Yes' to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
John W. Pramberg P.O. Box 455 Newburyport MA 01950	Trustee 2.00	6,600.	0.	0.
John C. Elwell 266 High Street Newburyport MA 01950	Trustee 2.00	8,850.	0.	0.
Peter DeMaranville 4 Adams Street Newburyport MA 01950	Trustee 2.00	6,600.	0.	0.
See Information about Officers, Directors, Trustees, Etc.		23,450.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
None				
0				
0				
0				
0				

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

None

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services – (see instructions). 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 None

Part IX A Summary of Direct Charitable Activities

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

	Expenses
1 None	
	0.
2	
3	
4	

Part IX B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 None	
	0.
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	None

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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	2,871,308.
b Average of monthly cash balances	1b	286,388.
c Fair market value of all other assets (see instructions)	1c	0.
d Total (add lines 1a, b, and c)	1d	3,157,696.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2 Acquisition indebtedness applicable to line 1 assets	2	
3 Subtract line 2 from line 1d	3	3,157,696.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	47,365.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,110,331.
6 Minimum investment return. Enter 5% of line 5.	6	155,517.

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	155,517.
2a Tax on investment income for 2009 from Part VI, line 5	2a	953.	
b Income tax for 2009 (This does not include the tax from Part VI)	2b		
c Add lines 2a and 2b		2c	953.
3 Distributable amount before adjustments. Subtract line 2c from line 1		3	154,564.
4 Recoveries of amounts treated as qualifying distributions		4	
5 Add lines 3 and 4		5	154,564.
6 Deduction from distributable amount (see instructions)		6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	154,564.

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	160,203.
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	160,203.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	0.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	160,203.

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				154,564.
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only			0.	
b Total for prior years: 20 __, 20 __, 20 __				
3 Excess distributions carryover, if any, to 2009:				
a From 2004	13,190.			
b From 2005	57,639.			
c From 2006	79,512.			
d From 2007	36,588.			
e From 2008	49,072.			
f Total of lines 3a through e	236,001.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 160,203.				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2009 distributable amount				
e Remaining amount distributed out of corpus	160,203.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	396,204.			
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				
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 instructions			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				154,564.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	13,190.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	383,014.			
10 Analysis of line 9:				
a Excess from 2005	57,639.			
b Excess from 2006	79,512.			
c Excess from 2007	36,588.			
d Excess from 2008	49,072.			
e Excess from 2009	160,203.			

Part XIV	Private Operating Foundations (see instructions and Part VII-A, question 9)
-----------------	--

N/A

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

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

4942(j)(5)

- 2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . .

b 85% of line 2a

c Qualifying distributions from Part XII,
line 4 for each year listed . .

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities
Subtract line 2d from line 2c .

- 3** Complete 3a, b, or c for the alternative test relied upon:

a 'Assets' alternative test – enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed .

c 'Support' alternative test – enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV **Supplementary Information** (Complete this part only if the organization had \$5,000 or more in assets at any time during the year – see instructions.)

1 Information Regarding Foundation Managers:

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

None

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

None

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

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

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

John C. Elwell
266 High Street
Newburyport

MA 01950 (978) 462-8749

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

See attached application

c Any submission deadlines

April 30, 2010

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

Residents of Newburyport pursuing a field of study in engineering or basic science. See attached application.

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				
University of Colorado Regent Admin Bldg-77 UCB Boulder CO 80309-0077		Public Charity	Tuition Scholarship	8,000.
Villanova 800 E. Lancaster Avenue Villanova PA 19085		Public Charity	Tuition Scholarship	8,000.
Bard College P.O. Box 5000 Annadale on Hudson NY 12504		Public Charity	Tuition Scholarship	8,000.
Bryant College 1150 Douglas Pike Smithfield RI 02917		Public Charity	Tuition Scholarship	8,000.
Colorado School of Mines 1600 Maple Street Golden CO 80401		Public Charity	Tuition Scholarship	8,000.
Suffolk University 41 Temple Street Boston MA 02108		Public Charity	Tuition Scholarship	8,000.
Northeastern University 360 Huntington Avenue Boston MA 02115		Public Charity	Tuition Scholarship	14,000.
Bentley College 175 Forest Street Waltham MA 02452		Public Charity	Tuition Scholarship	4,000.
Boston University 25 Buick Street, #1 Boston MA 02215-1301		Public Charity	Tuition Scholarship	8,000.
See Line 3a statement				34,000.
Total			3a	108,000.
b Approved for future payment				
Total			3b	

Form 990-PF
Part I, Line 6a**Net Gain or Loss From Sale of Assets****2009**

Name Wheelwright Scientific School	Employer Identification Number 04-6004390
--	---

Asset Information:Description of Property: Publicly traded securities

Date Acquired: _____ How Acquired: _____

Date Sold: _____ Name of Buyer: _____

Sales Price: 120,112. Cost or other basis (do not reduce by depreciation) 126,585.

Sales Expense: _____ Valuation Method: _____

Total Gain (Loss): -6,473. Accumulation Depreciation: _____

Description of Property: _____

Date Acquired: _____ How Acquired: _____

Date Sold: _____ Name of Buyer: _____

Sales Price: _____ Cost or other basis (do not reduce by depreciation) _____

Sales Expense: _____ Valuation Method: _____

Total Gain (Loss): _____ Accumulation Depreciation: _____

Description of Property: _____

Date Acquired: _____ How Acquired: _____

Date Sold: _____ Name of Buyer: _____

Sales Price: _____ Cost or other basis (do not reduce by depreciation) _____

Sales Expense: _____ Valuation Method: _____

Total Gain (Loss): _____ Accumulation Depreciation: _____

Description of Property: _____

Date Acquired: _____ How Acquired: _____

Date Sold: _____ Name of Buyer: _____

Sales Price: _____ Cost or other basis (do not reduce by depreciation) _____

Sales Expense: _____ Valuation Method: _____

Total Gain (Loss): _____ Accumulation Depreciation: _____

Description of Property: _____

Date Acquired: _____ How Acquired: _____

Date Sold: _____ Name of Buyer: _____

Sales Price: _____ Cost or other basis (do not reduce by depreciation) _____

Sales Expense: _____ Valuation Method: _____

Total Gain (Loss): _____ Accumulation Depreciation: _____

Description of Property: _____

Date Acquired: _____ How Acquired: _____

Date Sold: _____ Name of Buyer: _____

Sales Price: _____ Cost or other basis (do not reduce by depreciation) _____

Sales Expense: _____ Valuation Method: _____

Total Gain (Loss): _____ Accumulation Depreciation: _____

Description of Property: _____

Date Acquired: _____ How Acquired: _____

Date Sold: _____ Name of Buyer: _____

Sales Price: _____ Cost or other basis (do not reduce by depreciation) _____

Sales Expense: _____ Valuation Method: _____

Total Gain (Loss): _____ Accumulation Depreciation: _____

Description of Property: _____

Date Acquired: _____ How Acquired: _____

Date Sold: _____ Name of Buyer: _____

Sales Price: _____ Cost or other basis (do not reduce by depreciation) _____

Sales Expense: _____ Valuation Method: _____

Total Gain (Loss): _____ Accumulation Depreciation: _____

Form 990-PF, Page 1, Part I, Line 11

Line 11 Stmt

Other income:	Rev/Exp Book	Net Inv Inc	Adj Net Inc
Settlements	1,433.	1,433.	1,433.
Other	500.		500.
Total	1,933.	1,433.	1,933.

Form 990-PF, Page 1, Part I, Line 23

Line 23 Stmt

Other expenses:	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
Liability insurance	2,049.	0.	0.	2,049.
Newspaper notification	104.	0.	0.	104.
Office supplies	101.	0.	0.	101.
Total	2,254.	0.	0.	2,254.

Form 990-PF, Page 6, Part VIII, Line 1

Information about Officers, Directors, Trustees, Etc.

(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
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> Josiah Welch P.O. Box 6013 Newburyport MA 01950	Trustee 2.00	9,600.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> James G. Zafris, Jr. 264 High Street Newburyport MA 01950	Trustee 2.00	10,350.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> Honorable Donna Holaday C/O City Hall Newburyport MA 01950	Trustee 2.00	3,500.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/>				

Total

23,450. 0. 0.

Form 990-PF, Page 11, Part XV, line 3a

Line 3a statement

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Founda- tion status of re- cipient	Purpose of grant or contribution	Person or Business Checkbox Amount
a Paid during the year				
University of Mass at Lowell				Person or <input type="checkbox"/>
1 University Avenue		Public		Business <input checked="" type="checkbox"/>
Lowell MA 01854		Charity	Tuition Scholarship	5,000.
Rochester Institute of Technology				Person or <input type="checkbox"/>
55 Lomb Memorial Drive		Public		Business <input checked="" type="checkbox"/>
Rochester NY 14653		Charity	Tuition Scholarship	8,000.
Bridgewater State College				Person or <input type="checkbox"/>
131 Summer Street		Public		Business <input checked="" type="checkbox"/>
Boston MA 02352		Charity	Tuition Scholarship	5,000.
Endicott College				Person or <input type="checkbox"/>
376 Hale Street		Public		Business <input checked="" type="checkbox"/>
Beverly MA 01915		Charity	Tuition Scholarship	8,000.
Albany College of Pharmacy				Person or <input type="checkbox"/>
106 New Scotland Avenue		Public		Business <input checked="" type="checkbox"/>
Albany NY 12208		Charity	Tuition Scholarship	8,000.

Total

34,000.

Form 990-PF, Page 1, Part I

Line 16b - Accounting Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Anna Makos	Bookkeeping	6,000.	3,000.	3,000.	3,000.
Fritz DeGuglielmo LLC	Tax Returns	2,308.	1,154.	1,154.	1,154.
Total		<u>8,308.</u>	<u>4,154.</u>	<u>4,154.</u>	<u>4,154.</u>

Form 990-PF, Page 1, Part I

Line 16c - Other Professional Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Seaward Management	Investment Management	21,850.	19,665.	19,665.	2,185.
Charles Schwab Instit	Custodial fees	30.	15.	15.	15.
Total		<u>21,880.</u>	<u>19,680.</u>	<u>19,680.</u>	<u>2,200.</u>

Form 990-PF, Page 2, Part II, Line 10b

L-10b Stmt

Line 10b - Investments - Corporate Stock:	End of Year	
	Book Value	Fair Market Value
See attached statement	1,902,005.	1,929,735.
Total	<u>1,902,005.</u>	<u>1,929,735.</u>

Form 990-PF, Page 2, Part II, Line 10c

L- 10c Stmt

Line 10c - Investments - Corporate Bonds:	End of Year	
	Book Value	Fair Market Value
See attached statement	832,705.	884,537.
Total	<u>832,705.</u>	<u>884,537.</u>

SEAWARD MANAGEMENT
UNREALIZED GAINS AND LOSSES
WHEELWRIGHT SCIENTIFIC SCHOOL
SCHWAB INSTITUTIONAL A/C 4482-8174

June 30, 2010

Date	Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value	Unrealized Gain/Loss	% G/L
CASH AND EQUIVALENTS								
		SCHWAB ADV CASH RESERV-PREMIER SWEEP SHS		158,031 20		158,031 20		
				158,031 20				
COMMON STOCK								
MATERIALS								
02-17-09	600 00	BHP BILLITON LTD SPONSORED ADR	38 88	23,330 95	61 99	37,194 00	13,863 05	59 4
02-17-09	600 00	MONSANTO CO NEW COM	79 51	47,707 70	46 22	27,732 00	-19,975 70	-41 9
02-17-09	300 00	POTASH CORP SASK INC COM	78 66	23,597 95	86 24	25,872 00	2,274 05	9 6
04-22-08	900 00	PRAXAIR INC	80 72	72,646 85	75 99	68,391 00	-4,255 85	-5 9
				167,283 45		159,189 00	-8,094 45	-4 8
INDUSTRIALS								
05-23-08	3,000 00	ABB LTD ADR	25 81	77,444 20	17 28	51,840 00	-25,604 20	-33 1
01-01-50	3,000 00	GENERAL ELECTRIC	36 80	110,390 00	14 42	43,260 00	-67,130 00	-60 8
01-01-50	1,200 00	ILLINOIS TOOL WKS INC	56 31	67,574 00	41 28	49,536 00	-18,038 00	-26 7
01-15-10	500 00	RAYTHEON	53 31	26,656 05	48 39	24,195 00	-2,461 05	-9 2
04-22-08	900 00	UNITED TECHNOLOGIES	68 27	61,441 40	64 91	58,419 00	-3,022 40	-4 9
04-22-08	1,000 00	URS CORP	39 82	39,816 85	39 35	39,350 00	-466 85	-1 2
04-22-08	1,500 00	WASTE MGMT INC DEL COM	33 78	50,670 70	31 29	46,935 00	-3,735 70	-7 4
				433,993 20		313,535 00	-120,458 20	-27 8
CONSUMER DISCRETIONARY								
01-01-50	2,300 00	COMCAST CORP CL A SPL	20 62	47,428 95	16 43	37,789 00	-9,639 95	-20 3
01-01-50	2,000 00	PETSMART INC	24 91	49,817 95	30 17	60,340 00	10,522 05	21 1

SEAWARD MANAGEMENT
UNREALIZED GAINS AND LOSSES
WHEELWRIGHT SCIENTIFIC SCHOOL
SCHWAB INSTITUTIONAL A/C 4482-8174

June 30, 2010

Date	Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value	Unrealized Gain/Loss	% G/L
01-01-50	2,750 00	STAPLES INC	9 89	27,188 33	19 05	52,387 50	25,199 17	92 7
				124,435 23		150,516 50	26,081 27	21 0
CONSUMER STAPLES								
08-21-09	2,000 00	CVS CAREMARK CORPORATION	35 71	71,426 95	29 32	58,640 00	-12,786 95	-17 9
01-01-50	1,500 00	PEPSICO INC	29 16	43,738 45	60 95	91,425 00	47,686 55	109 0
01-01-50	1,000 00	PROCTER & GAMBLE	10 37	10,374 41	59 98	59,980 00	49,605 59	478 2
01-01-50	1,000 00	WAL MART STORES	1 89	1,889 37	48 07	48,070 00	46,180 62	2,444 2
				127,429 18		258,115 00	130,685 82	102 6
HEALTHCARE								
01-01-50	1,500 00	ABBOTT LABS	1 04	1,558 35	46 78	70,170 00	68,611 65	4,402 8
04-29-08	83 00	FURJEX PHARMAC INC COM	16 75	1,389 84	10 16	843 28	-546 56	-39 3
08-21-08	400 00	GENZYME CORP	79 47	31,788 35	50 77	20,308 00	-11,480 35	-36 1
08-21-09	500 00	GILEAD SCIENCES INC COM	46 17	23,083 95	34 28	17,140 00	-5,943 95	-25 7
01-01-50	800 00	JOHNSON & JOHNSON COM	55 64	44,512 00	59 06	47,248 00	2,736 00	6 1
12-17-08	600 00	MEDCO HEALTH SOLUTIONS COM	41 27	24,764 95	55 08	33,048 00	8,283 05	33 4
04-29-08	1,000 00	PHARMACEUTICAL PROD	38 47	38,469 19	25 41	25,410 00	-13,059 19	-33 9
04-27-09	750 00	TEVA PHARMACEUTICAL INDS LTD ADR	47 10	35,326 90	51 99	38,992 50	3,665 60	10 4
04-22-08	1,000 00	THERMO FISHER SCIENTIFIC INC	46 97	46,971 40	49 05	49,050 00	2,078 60	4 4
				247,864 93		302,209 78	54,344 85	21 9
ENERGY								
01-01-50	750 00	ANADARKO PETE CORP COM	41 51	31,130 03	36 09	27,067 50	-4,062 53	-13 1
01-01-50	600 00	APACHE CORP	66 43	39,858 30	84 19	50,514 00	10,655 70	26 7

SEAWARD MANAGEMENT
UNREALIZED GAINS AND LOSSES
WHEELWRIGHT SCIENTIFIC SCHOOL
SCHWAB INSTITUTIONAL A/C 4482-8174

June 30, 2010

Date	Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value	Unrealized Gain/Loss	% G/L
06-19-08	400 00	BAKER HUGHES INC	85 73	34,290 10	41 57	16,628 00	-17,662 10	-51 5
01-01-50	800 00	EXXON MOBIL CORP	38 62	30,894 00	57 07	45,656 00	14,762 00	47 8
01-01-50	750 00	SCHLUMBERGER	87 32	65,487 50	55 34	41,505 00	-23,982 50	-36 6
08-21-08	350 00	TRANSOCEAN LTD, ZUG	132 83	46,490 45	46 33	16,215 50	-30,274 95	-65 1
				248,150 38		197,586 00	-50,564 38	-20 4
FINANCIAL								
03-26-10	800 00	BANK MONTREAL QUE COM	59 46	47,564 79	54 28	43,424 00	-4,140 79	-8 7
04-22-08	750 00	FRANKLIN RES INC	96 41	72,305 20	86 19	64,642 50	-7,662 70	-10 6
08-12-09	450 00	NORTHERN TRUST CORP COM	59 57	26,806 68	46 70	21,015 00	-5,791 68	-21 6
				146,676 67		129,081 50	-17,595 17	-12 0
INFORMATION TECHNOLOGY								
07-01-08	1,100 00	ACCENTURE PLC IRELAND	40 73	44,802 06	38 65	42,515 00	-2,287 06	-5 1
04-27-09	600 00	ADOBE SYS INC COM	26 59	15,953 95	26 43	15,858 00	-95 95	-0 6
10-16-09	700 00	CHECK POINT SOFTWARE ORD	29 59	20,712 08	29 48	20,636 00	-76 08	-0 4
01-01-50	3,000 00	CISCO SYSTEMS INC	22 64	67,920 00	21 31	63,930 00	-3,990 00	-5 9
04-22-08	3,000 00	EMC CORP-MASS	15 48	46,435 90	18 30	54,900 00	8,464 10	18 2
04-22-08	1,000 00	FISERV INC	51 77	51,774 64	45 66	45,660 00	-6,114 64	-11 8
01-22-10	50 00	GOOGLE INC CL A	560 86	28,042 89	444 95	22,247 50	-5,795 39	-20 7
01-01-50	3,000 00	INTEL CORP	20 91	62,716 67	19 45	58,350 00	-4,366 67	-7 0
01-01-50	3,000 00	ORACLE CORP	12 15	36,450 00	21 46	64,380 00	27,930 00	76 6
				374,808 19		388,476 50	13,668 31	3 6
INTERNATIONAL								
08-28-09	200 00	ISHARES INC MSCI BRAZIL	59 69	11,938 95	61 83	12,366 00	427 05	3 6

SEAWARD MANAGEMENT
UNREALIZED GAINS AND LOSSES
WHEELWRIGHT SCIENTIFIC SCHOOL
SCHWAB INSTITUTIONAL A/C 4482-8174
June 30, 2010

Date	Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value	Unrealized Gain/Loss	% G/L
02-11-10	500.00	ISHARES TR MSCI EMERG MKT	38.85	19,423.95	37.32	18,660.00	-763.95	-3.9
				31,362.90		31,026.00	-336.90	-1.1
		COMMON STOCK Total		1,902,004.13		1,929,735.28	27,731.15	1.5
CORPORATE BONDS								
01-14-09	100,000	INTERNATIONAL BUSINESS MACHS 4.750% Due 11-29-12	106.07	106,067.00	108.25	108,251.30	2,184.30	2.1
01-14-09	100,000	BOEING CO 5.125% Due 02-15-13	104.79	104,786.00	109.26	109,263.20	4,477.20	4.3
03-02-09	100,000	PEPSICO INC 3.750% Due 03-01-14	100.98	100,981.00	106.61	106,607.80	5,626.80	5.6
02-26-09	100,000	CHEVRON CORPORATION 3.950% Due 03-03-14	99.83	99,831.00	107.19	107,189.50	7,358.50	7.4
05-05-09	50,000	HEWLETT PACKARD CO 4.750% Due 06-02-14	105.36	52,679.50	110.80	55,399.30	2,719.80	5.2
03-02-09	100,000	EMERSON ELEC CO 5.000% Due 12-15-14	106.11	106,107.00	112.60	112,597.70	6,490.70	6.1
01-14-09	50,000	BAXTER INTL INC 4.625% Due 03-15-15	104.75	52,373.00	110.19	55,093.75	2,720.75	5.2
02-18-09	100,000	CISCO SYS INC 5.500% Due 02-22-16	104.15	104,151.00	115.20	115,199.30	11,048.30	10.6
01-20-09	100,000	UNITED TECHNOLOGIES CORP 5.375% Due 12-15-17	105.73	105,730.00	114.62	114,624.00	8,894.00	8.4
				832,705.50		884,225.85	51,520.35	6.2
TOTAL PORTFOLIO				2,892,740.83		2,971,992.33	79,251.50	2.7

APPLICATION TO THE TRUSTEES
OF THE
WHEELWRIGHT SCIENTIFIC SCHOOL

Newburyport, MA

Date _____

I respectfully make application for assistance to obtain a Scientific Education at the:

1. Name of University and location _____

Tuition per annum _____

2. I desire to attend the above-named University for the following reasons:

3. The subjects included in my curriculum for the ensuing year are:

4. Name and residence _____

5. Date and place of birth _____

6. Social Security Number _____

7. Name and residence of parents or guardian _____

8. I am a Protestant as understood by that term, and attend the _____

Church of which I am _____ am not _____ a member.

9. In preparing for college, I attended the following school _____

of which _____ is principal

10. I also expect to apply for a scholarship or loan from _____

Give details in full _____

11. I submit the names of the following persons as references. (It is requested that you include the name of the minister of the church which you attend as one of your references.)

12. In making this application, I agree that, if accepted as a beneficiary of the Wheelwright Scientific School, I will pursue a course in engineering or the basic sciences; that I will notify the Secretary of the Wheelwright Scientific School at the end of each college year of my final grades or markings for the year, and furnish the Secretary with a list of my studies for the coming year; and that I will notify said Secretary promptly of any changes in my courses of study that in any way may diminish the emphasis on science. I understand and agree that any failure on my part to comply with either or all of the foregoing requirements will mean automatic cancellation of the Wheelwright Scholarship.

Signed this _____ day of _____, _____.

Signature _____

References

1. I have known the above-named applicant and his family for _____ years as residents of Newburyport, and I recommend him for a Wheelwright Scholarship.

Signature _____

2. I have known the above-named applicant and his family for _____ years as residents of Newburyport, and I recommend him for a Wheelwright Scholarship.

Signature _____

3. I have known the above-named applicant and his family for _____ years as residents of Newburyport, and I recommend him for a Wheelwright Scholarship.

Signature _____

Principal or Headmaster:

Will you please give the standing of _____

while at your school, as to:

Character _____

Scholarship (average rank by years) _____

General Deportment _____

Do you regard him as deserving and meritorious? _____

Signature _____

Remarks

Important Notice

This blank must be completed in detail by the applicant and must be returned to the Secretary of the Wheelwright
Scientific School before _____
in order to receive consideration.