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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning , and ending

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

Name of foundation
TRUST U/W OLEONDA JAMESON
C/O MCLANE GRAF RAULERSON&MIDDLETON

Number and street (or P.O box number if mail is not delivered to street address): 11 S MAIN STREET
Room/suite: 500

City or town, state, and ZIP code: CONCORD NH 03301

A Employer identification number: 02-6048930

B Telephone number (see page 10 of the instructions): 603-226-0400

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) ▶ $ 5,265,163

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) (see page 11 of the instructions).)

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		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue					
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check ▶ ☒ if the foundation is **not** required to attach Sch B				
3	Interest on savings and temporary cash investments	66,119	66,119		
4	Dividends and interest from securities	61,291	61,291		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	32,457			
b	Gross sales price for all assets on line 6a 890,682				
7	Capital gain net income (from Part IV, line 2)		32,457		
8	Net short-term capital gain			0	
9	Income modifications				
10a	Gross sales less returns & allowances				
b	Less. Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule) STMT 1	705	705		
12	**Total.** Add lines 1 through 11	160,572	160,572	0	
Operating and Administrative Expenses					
13	Compensation of officers, directors, trustees, etc.	1,129	565		564
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule) STMT 2	2,075	1,037		1,308
c	Other professional fees (attach schedule) STMT 3	22,860	22,860		
17	Interest				
18	Taxes (attach schedule) (see page 14 of the instructions) STMT 4	5,291	1,941		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (att. sch.) STMT 5	687	12		675
24	**Total operating and administrative expenses.** Add lines 13 through 23	32,042	26,415	0	2,547
25	Contributions, gifts, grants paid	143,540			143,540
26	**Total expenses and disbursements.** Add lines 24 and 25	175,582	26,415	0	146,087
27	Subtract line 26 from line 12:				
a	**Excess of revenue over expenses and disbursements**	-15,010			
b	**Net investment income** (if negative, enter -0-)		134,157		
c	**Adjusted net income** (if negative, enter -0-)			0	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		88	88
	2	Savings and temporary cash investments	193,179	164,118	164,118
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (att. schedule) ▶			
		Less: allowance for doubtful accounts ▶ 0			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule) STMT 6	100,375	100,000	98,005
	b	Investments—corporate stock (attach schedule) SEE STMT 7	2,199,484	2,153,025	3,080,026
	c	Investments—corporate bonds (attach schedule) SEE STMT 8	1,184,979	1,186,564	1,254,428
	11	Investments—land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach sch) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule) SEE STATEMENT 9	647,808	707,019	668,498
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach sch) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	4,325,825	4,310,814	5,265,163
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here** ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ **and complete lines 27 through 31.**			
	27	Capital stock, trust principal, or current funds	4,325,825	4,310,814	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see page 17 of the instructions)	4,325,825	4,310,814	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	4,325,825	4,310,814	

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	4,325,825
2	Enter amount from Part I, line 27a	2	-15,010
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	4,310,815
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 10	5	1
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	4,310,814

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Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a	SEE WORKSHEET			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e				

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

	(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	(l) Gains (Col (h) gain minus col. (k), but not less than -0-) or Losses (from col (h))
a				
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 }	2	32,457
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	3	-18,477

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 page 18 of the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2009	246,423	4,510,132	0.054638
2008	293,644	5,199,965	0.056470
2007	301,362	5,962,583	0.050542
2006	377,706	5,711,556	0.066130
2005	258,951	5,618,145	0.046092

2	**Total** of line 1, column (d)	2	0.273872
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	0.054774
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	5,051,647
5	Multiply line 4 by line 3	5	276,699
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,342
7	Add lines 5 and 6	7	278,041
8	Enter qualifying distributions from Part XII, line 4	8	146,087

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: .... **(attach copy of letter if necessary—see instructions)**		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	2,683
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	2,683
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	2,683
6	Credits/Payments.		
a	2010 estimated tax payments and 2009 overpayment credited to 2010 — 6a: 2,500		
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	2,500
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	183
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be: **Credited to 2011 estimated tax** ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ______ **(2)** On foundation managers. ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ NH			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities (continued)

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

Website address ▶ N/A

14 The books are in care of ▶ CHARLES F LEAHY Telephone no. ▶ 603-226-0400
11 S MAIN ST, ST 500
Located at ▶ CONCORD NH ZIP+4 ▶ 03301

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

			Yes	No
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? **(Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	N/A	1c		
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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010?	☐ Yes ☒ No			
	If "Yes," list the years ▶ 20 , 20 , 20 , 20				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see page 22 of the 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. ▶ 20 , 20 , 20 , 20				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2010 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 2010.)	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 2010?		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)? (see page 22 of the instructions) ☐ Yes ☒ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No			
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? N/A	5b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945-5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		X
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No			
b	If Yes, did the foundation receive any proceeds or have any net income attributable to the transaction? 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 (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
C/O MCLANE GRAF CONCORD 11 S MAIN STREET NH 03301	TRUSTEE 2.00	1,129	0	0

2 Compensation of five highest-paid employees (other than those included on line 1 — see page 23 of the instructions). If none, enter "NONE."

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

Total number of other employees paid over $50,000 ▶ 0

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

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

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

Total number of others receiving over $50,000 for professional services ▶

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** (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See page 24 of the instructions 3	
Total. Add lines 1 through 3 ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	4,858,273
b	Average of monthly cash balances	1b	270,303
c	Fair market value of all other assets (see page 25 of the instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	5,128,576
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	5,128,576
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	76,929
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,051,647
6	**Minimum investment return.** Enter 5% of line 5	6	252,582

Part XI **Distributable Amount** (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	252,582
2a	Tax on investment income for 2010 from Part VI, line 5 — 2a: 2,683		
b	Income tax for 2010. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	2,683
3	Distributable amount before adjustments Subtract line 2c from line 1	3	249,899
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	249,899
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	249,899

Part XII **Qualifying Distributions** (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	146,087
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
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	146,087
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	146,087

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

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Part XIII Undistributed Income (see page 26 of the instructions)

			(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1	Distributable amount for 2010 from Part XI, line 7					249,899
2	Undistributed income, if any, as of the end of 2010:					
a	Enter amount for 2009 only					
b	Total for prior years: 20 ____ , 20 ____ , 20 ____					
3	Excess distributions carryover, if any, to 2010:					
a	From 2005					
b	From 2006	105,900				
c	From 2007	7,133				
d	From 2008	36,736				
e	From 2009	23,366				
f	**Total** of lines 3a through e		173,135			
4	Qualifying distributions for 2010 from Part XII, line 4: ▶ $ 146,087					
a	Applied to 2009, but not more than line 2a					
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)					
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)					
d	Applied to 2010 distributable amount					146,087
e	Remaining amount distributed out of corpus					
5	Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a).)		103,812			103,812
6	**Enter the net total of each column as indicated below:**					
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5		69,323			
b	Prior years' undistributed income. Subtract line 4b from line 2b					
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 page 27 of the instructions					
e	Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions					
f	Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011					0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)					
8	Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)					
9	**Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a		69,323			
10	Analysis of line 9:					
a	Excess from 2006	2,088				
b	Excess from 2007	7,133				
c	Excess from 2008	36,736				
d	Excess from 2009	23,366				
e	Excess from 2010					

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

N/A

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

N/A

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

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

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

CHARLES F LEAHY 603-226-0400
11 SO MAIN ST, STE 500 CONCORD NH 03301

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

SEE STATEMENT 11

c Any submission deadlines:

NONE

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

SEE STATEMENT 12

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				
SEE STATEMENT 13				143,540
Total			▶ 3a	143,540
b Approved for future payment				
N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See page 28 of the instructions)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	66,119	
4 Dividends and interest from securities			14	61,291	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			18	705	
8 Gain or (loss) from sales of assets other than inventory			18	32,457	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b FED TAX REFUND			1		
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0		160,572	0

13 Total. Add line 12, columns (b), (d), and (e) ... 13 160,572

(See worksheet in line 13 instructions on page 29 to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 29 of the instructions)
N/A	

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

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

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

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

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		

Sign Here

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

Signature of officer or trustee — Date: 5-05-2011 — Title: TRUSTEE

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed
DAWN E. WHITING		05/05/11	

Firm's name ▶	MASON & RICH P.A.	PTIN	P00650823
Firm's address ▶	6 BICENTENNIAL SQ CONCORD, NH 03301-4058	Firm's EIN ▶	02-0365196
		Phone no	603-224-2000

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
CARDINAL HEALTH CLASS ACTION	$ 705	$ 705	$
TOTAL	$ 705	$ 705	$ 0

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES	$ 2,075	$ 1,037	$	$ 1,308
TOTAL	$ 2,075	$ 1,037	$ 0	$ 1,308

Statement 3 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
STATE STREET BANK INV FEES	$ 22,860	$ 22,860	$	$
TOTAL	$ 22,860	$ 22,860	$ 0	$ 0

Statement 4 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FOREIGN TAX PAID	$ 1,941	$ 1,941	$	$
2009 FED TAX BAL DUE	850			
2010 FED TAX ESTIMATE	2,500			
TOTAL	$ 5,291	$ 1,941	$ 0	$ 0

Federal Statements

Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
	$	$	$	$
EXPENSES				
NH STATE FILING FEE	75			75
PROBATE BOND PREMIUM	600			600
BANK FEES	12	12		
TOTAL	$ 687	$ 12	$ 0	$ 675

Federal Statements

Statement 6 - Form 990-PF, Part II, Line 10a - US and State Government Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
50,000 FHLB 2.85% 8/26/13	$ 50,375	$	COST	$
50000 FHLB 3.75% 9/3/15	50,000		COST	
100,000 FFCB 2.29% 9/16/16		100,000	COST	98,005
TOTAL	$ 100,375	$ 100,000		$ 98,005

Statement 7 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
1800 AMPHENOL CORP	$ 52,607	$ 52,607	COST	$ 95,004
1,000 BARD (C R) INC	82,907	75,334	COST	91,770
1,100 BORGWARNER INC		51,052	COST	79,596
1200 BECTON DICKINSON	103,097		COST	
2,000 CHUBB CORP	48,591	38,873	COST	119,280
3,250 CISCO SYSTEMS INC	100,355	87,940	COST	65,748
1,625 ECOLAB INC	75,894	64,909	COST	81,933
2,500 EXXON MOBIL CORP	101,758	101,758	COST	182,800
650 FMC TECHNOLOGIES		42,957	COST	57,792
155 GOOGLE INC	43,961	43,961	COST	92,065
1,000 HEWLETT PACKARD CO		48,628	COST	42,100
1,600 ITT CORP	60,555	50,769	COST	83,376
2,200 JP MORGAN CHASE	61,481	61,481	COST	93,324
1,300 JOHNSON & JOHNSON	10,764	26,595	COST	80,405
2,000 JOHNSON CONTROLS	55,224	74,779	COST	76,400
900 KELLOGG CO	80,100	37,942	COST	45,972
1,950 MCCORMICK & CO	65,881	59,066	COST	90,734
1,000 MCCDONALDS CORP		79,410	COST	76,760

Federal Statements

Statement 7 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
2,250 MICROSOFT CORP	$ 65,809	$ 65,809	COST	$ 62,798
625 MONSANTO CO	52,438		COST	
1,550 NATIONAL OILWELL VARCO INC	70,175	70,175	COST	104,238
1,250 NIKE INC	83,212	83,212	COST	106,775
1,100 NORTHERN TRUST CORP		52,715	COST	60,951
1,150 PEPSICO INC	77,654	63,787	COST	75,130
650 PRAXAIR INC	28,030	19,694	COST	62,056
1,600 T ROWE PRICE	58,359	50,473	COST	103,264
1,400 PROCTOR & GAMBLE	3,160	3,160	COST	90,062
1,600 QUALCOMM INC	94,294	67,472	COST	79,184
1,300 ROPER INDUSTRIES INC	101,095	82,140	COST	99,359
1575 HENRY SCHEIN INC	74,809	74,809	COST	96,689
4,700 SCHWAB CHARLES CORP	78,113	78,113	COST	80,417
1,000 STRYKER CORP			COST	
1,550 TARGET CORP	88,755		COST	
775 3M CO	46,447	46,447	COST	66,883
475 UNION PACIFIC CORP		32,919	COST	44,014
1,000 UNITED TECHNOLOGIES CORP	46,950	37,560	COST	78,720
7,750 VANGUARD EMERGING MARKETS	287,009	287,009	COST	373,132
1,500 WASTE CONNECTIONS INC		39,470	COST	41,295
TOTAL	$ 2,199,484	$ 2,153,025		$ 3,080,026

Statement 8 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
50,000 AT&T INC	$	$ 49,601	COST	$ 49,825

Federal Statements

Statement 8 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
50,000 BK AMER CORP 4.6% 9.15.12	$ 50,000	$ 50,000	COST	$ 50,179
200,000 BELLSOUTH CORP 6% 10/15/11	202,765	202,765	COST	208,496
125,000 JOHN DEERE CAP CORP 5.1% 1/1	127,411	127,411	COST	134,969
25,000 DELL INC 4.7% 4/15/13	25,479	25,479	COST	26,837
50,000 DUKE ENERGY CORP		52,415	COST	52,396
50,000 GENERAL ELECTRIC		49,159	COST	53,449
50,000 GOLDEN WEST FINL 4.75% 10/01/	50,550	50,550	COST	52,902
75,000 GOLDMAN SACHS GRP 5.7% 9/1/12	74,502	74,502	COST	80,052
50,000 MCCORMICK & CO 5.8% 7/15/11	51,001	51,001	COST	51,458
100,000 METLIFE INC 5.375% 12/15/12	100,282	100,282	COST	107,083
100,000 PRINCIPAL LIFE MTN 5.1% 4/15		98,319	COST	107,850
ST PAUL TRAVELERS 5.5% 12/1/15	153,435	153,435	COST	168,368
CHARLES SCHWAB CORP 4.95% 6/1/14	24,845	24,845	COST	27,186
75,000 WYETH 5.5% 2/01/14	76,800	76,800	COST	83,378
100,000 EI DUPONT 4.125% 4/30/10	100,431		COST	
50,000 GENERAL ELECTRIC 5% 2/1/13	49,159		COST	
100,000 PRINCIPAL LIFE 5.1% 4/15/14	98,319		COST	
TOTAL	$ 1,184,979	$ 1,186,564		$ 1,254,428

Statement 9 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
900 COOPER INDUSTRIES	$	$ 47,882	COST	$ 52,461
925 BHP BILLITON LTD ADR	56,733	56,733	COST	85,951
6242.344 DODGE & COX INTL STOCK FD	180,000	250,000	COST	222,914
6,334.107 FIDELITY ADVISOR DIVER INT	155,000	155,000	COST	103,119

Federal Statements

Statement 9 - Form 990-PF, Part II, Line 13 - Other Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
1,300 TOTAL FINA ELF SA-SPONS ADR	$ 58,254	$ 58,254	COST	$ 69,524
2,300 ROCHE HLDGS LTD	102,821	89,150	COST	84,295
95,000 DISCOVER BK CD	95,000		COST	
50,000 GE MONEY BANK CD		50,000	COST	50,234
TOTAL	$ 647,808	$ 707,019		$ 668,498

Statement 10 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	Amount
ROUNDING	$ 1
TOTAL	$ 1

Federal Statements

Statement 11 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description
LETTER STATING AMOUNT AND PURPOSE OF PROPOSED GRANT AND INFORMATION ON APPLICANT

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description
NONE

Statement 12 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description
THE INCOME FROM THE TRUST MAY BE USED FOR THE BENEFIT OF THE POOR AND DESTITUTE IN THE STATE OF NEW HAMPSHIRE AND FOR CHARITABLE AND EDUCATIONAL PURPOSES THEREIN.

Federal Statements

Statement 13 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Name / Address	Address / Relationship	Status	Purpose	Amount
CHILD AND FAMILY SERVICES MANCHESTER NH 03105	464 CHESTNUT ST NONE	PUBLIC	GENERAL	10,840
CATCH NEIGHBORHOOD HOUSIN CONCORD NH 03301	76 SOUTH STATE ST NONE	PUBLIC	GENERAL	20,000
BOYS & GIRLS CLUB OF GREA NASHUA NH 03060	47 GRAND AVE NONE	PUBLIC	GENERAL	5,000
WENTWORTH DOUGLAS HOSPITA DOVER NH 03820	789 CENTRAL AVENUE NONE	PUBLIC	GENERAL	5,000
NH ASSOCIATION FOR THE BL CONCORD NH 03301	25 WALKER ST NONE	PUBLIC	GENERAL	5,000
BRIDGE HOUSE PLYMOUTH NH 03246	260 HIGHLAND ST NONE	PUBLIC	GENERAL	5,000
LACONIA AREA COMMUNITY LA LACONIA NH 03246	658 UNION AVE NONE	PUBLIC	GENERAL	10,000
CONCORD BOYS & GIRLS CLUB CONCORD NH 03301	55 BRADLEY ST NONE	PUBLIC	GENERAL	10,000
THE MAYHEW PROGRAM BRISTOL NH 03222	PO BOX 120 NONE	PUBLIC	GENERAL	5,000
PINE HILL CHILD CARE CENT PETERBOROUGH NH 03458	184 HANCOCK RD NONE	PUBLIC	GENERAL	5,000
MONADNOCK COMMUNITY HOSPI PETERBOROUGH NH 03458	452 OLD STREET RD NONE	PUBLIC	HEALTHY TEETH TO TOES	10,000
UNITED WAY OF MERRIMACK CONCORD NH 03302	PO BOX 608 NONE	PUBLIC	CONCORD MULTICULTURAL FESTIVAL	500
CONCORD YMCA CONCORD NH 03301	15 N STATE ST NONE	PUBLIC	GENERAL	7,000
US DEPT OF AGRICULTURE CONCORD NH 03301	10 FERRY ST, SUITE 218 NONE	PUBLIC	SUSAN & THOMAS CLARK FUND	25,000
GSIL CONCORD NH 03301	21 CHENELL DR NONE	PUBLIC	GENERAL	5,000
SHARE MILFORD NH 03055	1 COLUMBUS AVE NONE	PUBLIC	GENERAL	5,000
CIRCLE PROGRAM PLYMOUTH NH 03264	85 MAIN ST, #5 NONE	PUBLIC	GENERAL	5,200
CASA MANCHESTER NH 03105	PO BOX 1327 NONE	PUBLIC	GENERAL	5,000

Federal Statements

Statement 13 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name / Address	Address / Relationship	Status	Purpose	Amount
TOTAL				143,540

5628930

TRUST U/W OLEONDA JAMESON 02-6048930 FORM 990-PF ESTIMATES
C/O MCLANE GRAF RAULERSON&MIDDLETON

Form **990-W** (WORKSHEET)
Department of the Treasury
Internal Revenue Service

Estimated Tax on Unrelated Business Taxable Income for Tax-Exempt Organizations

(and on Investment Income for Private Foundations)
(Keep for your records. Do not send to the Internal Revenue Service.)

OMB No. 1545-0976

2011

1	Unrelated business taxable income expected in the tax year		1	
2	**Tax on the amount on line 1.** See instructions for tax computation		2	
3	Alternative minimum tax (see instructions)		3	
4	Total. Add lines 2 and 3		4	
5	Estimated tax credits (see instructions)		5	
6	Subtract line 5 from line 4		6	
7	Other taxes (see instructions)		7	
8	Total. Add lines 6 and 7		8	
9	Credit for federal tax paid on fuels (see instructions)		9	
10a	Subtract line 9 from line 8. **Note.** If less than $500, the organization is not required to make estimated tax payments. Private foundations, see instructions	10a 2,683		
b	Enter the tax shown on the 2010 return (see instructions). **Caution.** If zero or the tax year was for less than 12 months, skip this line and enter the amount from line 10a on line 10c	10b 2,683		
c	**2011 Estimated Tax.** Enter the smaller of line 10a or line 10b. If the organization is required to skip line 10b, enter the amount from line 10a on line 10c		10c	2,683

			(a)	(b)	(c)	(d)
11	**Installment due dates** (see instructions)	11	05/16/11	06/15/11	09/15/11	12/15/11
12	**Required installments.** Enter 25% of line 10c in columns **(a)** through **(d)** unless the organization uses the annualized income installment method, the adjusted seasonal installment method, or is a "large organization" (see instructions)	12	2,700			
13	**2010 Overpayment** (see instructions)	13				
14	**Payment due.** (Subtract line 13 from line 12.)	14	2,700			

For Paperwork Reduction Act Notice, see the instructions on page 8.

DAA