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Department of the Treasury

Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-0047

Open to Public Inspection

A I	or th	e 2010 calendar year, or tax year beginning , 2010, and endi	ng	, 20
		c Name of organization EDITH STEWART CHASE FOUNDATION - AGEN	D Employer identifica	ation number
	Add	ess Doing Rusingss As	04-324234	1
┝	Nam	e change Number and street (or P O box if mail is not delivered to street address) Room/suite	E Telephone number	
_	┥	Ireturn 300 EAST MAIN STREET		
	┪	City or town, state or country, and ZIP + 4		
	Ame	MILFORD, MA 01757-0228	G Gross receipts \$	185,756
Г		nestion F Name and address of principal officer	H(a) is this a group return	for Yes X N
			H(b) Are all affiliates incl	uded? Yes N
)	Tax-e	xempt status. X 501(c)(3) 501(c) () ◀ (insert no) 4947(a)(1) or 5.	27 If "No," attach a list	(see instructions)
J	Webs	ite: ▶ N/A	H(c) Group exemption nu	mber 🕨
K	Form	of organization Corporation X Trust Association Other ▶ L Year	of formation 1994 M State of	of legal domicile MA
Pa	rt I	Summary		
	1	Briefly describe the organization's mission or most significant activities:		
		TO ASSIST RETIRED MEMBERS OF THE RETIRED EDUCATORS AS		
an C		MASSACHUSETTS (REAM) WHO ARE IN NEED OF ASSISTANCE ON	A TEMPORARY	
er		BASIS.		
Governance	2	Check this box If the organization discontinued its operations or disposed of more the	1 1	
ૐ	3	Number of voting members of the governing body (Part VI, line 1a)		· · · · · · · · · · · · · · · · · · ·
Activities	4	Number of independent voting members of the governing body (Part VI, line 1b)		
ξŸ	5	Total number of individuals employed in calendar year 2010 (Part V, line 2a)		NONE
Ac	6	Total number of volunteers (estimate if necessary)	6	370377
	7 a		I I	NONE
	b	Net unrelated business taxable income from Form 990-T, line 34		NONE Current Year
		0 1 1 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Prior Year	
e	8	Contributions and grants (Part VIII, line 1h)		37,110
Revenue	9	Program service revenue (Part VIII, line 2g)	24,138	30,687
Be		Investment income (Part VIII, column (A), lines 3, 4, and 7d) Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		518
	11	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)		68,315
_	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)		8,360
	14	Benefits paid to or for members (Part IX, column (A), line 4)	8;200	9,642
	15	Salaries other compensation, employee henefits (Part IX column (A) lines 5-10)	16 7311 101	3,7032
Ses	16	a Professional fundraising fees (Part IX, column (A), line 11e)		
Expenses		Total fundraising expenses (Part IX, column (D), line 25) ► 325. \	1171	
û	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	21,102	17,553
		Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	48,354	35,555
	19	Revenue less expenses Subtract line 18 from line 12	-10,573	32,760
ŏ	ŝ		Beginning of Current Year	End of Year
Assets or	20	Total assets (Part X, line 16)	802,652	833,960
Y As	21	Total liabilities (Part X, line 26)	NONE	NOI
Ž,	22	Net assets or fund balances. Subtract line 21 from line 20	802,652	833,960
Pa	art II	Signature Block		
U	nder po	enalties of perjury, I declare that I have examined this return, including accompanying schedules and stateme and complete. Declaration of preparer (other than officer) is based on all information of which preparer has ai	nts, and to the best of my knowle	dge and belief, it is true,
	Sign	Margaret Achidean	05/03/2	011
ì	lere	Signature of officer	Date	
		MARGARET A BILODEAD TREASURER		
		Type or print name and title	Check if	I PTIN
Pai	id	Print/Type preparer's name Preparer's signature Date	eelf	¬ l
Pre	pare	(mm/ merss 103		P00260194
Us	e Onl	Firm's name THOMSON REUTERS (TAX & ACCOUNTING)		1297386
		Firm's address > 35 THOMSON PLACE, 1ST FL; BOSTON, MA 02210		-950-8810
Ma	<u> </u>	IRS discuss this return with the preparer shown above? (see instructions)	<u> </u>	X Yes No
For	r Papo	erwork Reduction Act Notice, see the separate instructions.		Form 990 (2010
10	1 000 _	DECEC (2011 OF /02 /2011 15 41 02 001220		۰ ۱۷
	E	BBZ876 672H 05/03/2011 15:41:02 001378		8 /

	30 (20		<u></u>	rage Z
Part _s		Statement of Program Service Accomplishments Check if Schedule O contains a response to any question in	in this Part III	
		describe the organization's mission:		
		SSIST RETIRED MEMBERS OF THE RETIRED ED		
_	_	ACHUSETTS (REAM) WHO ARE IN NEED OF ASS	SISTANCE ON A TEMPORARY	
DA	SIS	<u> </u>		_
the	e pric	e organization undertake any significant program services for Form 990 or 990-EZ?		X No
3 Di		e organization cease conducting, or make significant chang		X No
4 De	scrib	be the exempt purpose achievements for each of the organia		
		n $501(c)(3)$ and $501(c)(4)$ organizations and section $4947(a)$ tions to others, the total expenses, and revenue, if any, for ea		
	ode:	:) (Expenses \$18,002 including grants	nts of \$) (Revenue \$)	
_				
_				
_				
_	,			
_				
4b (C	ode [.]	·) (Expenses \$including grant	nts of \$) (Revenue \$)	
<u> </u>				
_				
_ _				- -
_				
4c (C	ode:	::) (Expenses \$including grants	ts of \$) (Revenue \$)	
_				· -
_				
_	-			
_				
		program services. (Describe in Schedule O.)	\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	
		nses \$ including grants of \$) (Revenue \$	
40 1	otal	program service expenses ► 18,002.	Form 990	(2010

Part _c	Checklist of Required Schedules			
	r		Yes	No
	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes,"			
	complete Schedule A	1	<u>X</u>	
	Is the organization required to complete Schedule B, Schedule of Contributors? (see instructions)	2		X
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to			
	candidates for public office? If "Yes," complete Schedule C, Part I	3		<u>X</u>
	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h)			
	election in effect during the tax year? If "Yes," complete Schedule C, Part II	4		<u>X</u>
	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues,			
	assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C,			
	Part III	_5_		
6	Did the organization maintain any donor advised funds or any similar funds or accounts where donors have			
	the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes,"			
	complete Schedule D, Part I	6		X
	Did the organization receive or hold a conservation easement, including easements to preserve open space,			
	the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7		<u>X</u>
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes,"			
	complete Schedule D, Part III	8		X
	Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part			
	X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes,"			
	complete Schedule D, Part IV	9		<u> X</u>
	Did the organization, directly or through a related organization, hold assets in term, permanent, or		İ	.,
	quasi-endowments? If "Yes," complete Schedule D, Part V	10		X
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI,		ŀ	
	VII, VIII, IX, or X as applicable.			
а	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete	44-		
	Schedule D, Part VI	11 <u>a</u>		├
b	Did the organization report an amount for investments other securities in Part X, line 12 that is 5% or more	11b		
	of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	110		\vdash
C	Did the organization report an amount for investments-program related in Part X, line 13 that is 5% or more	11c		
	of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	1 10	-	\vdash
а	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX	11d		
_	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e		$\overline{}$
	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses			\top
'	the organization's separate of consolidated inflatical statements for the tax year include a feetilete that decreases the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	11f		
120	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes,"			
120	complete Schedule D, Parts XI, XII, and XIII.	12a		X
h	Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if			Π
	the organization answered "No" to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional	12b		1
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13		Х
	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising,			
	business, and program service activities outside the United States? If "Yes," complete Schedule F, Parts I and IV · ·	14b	<u> </u>	X
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any	ļ		
	organization or entity located outside the United States? If "Yes," complete Schedule F, Parts II and IV	15	<u> </u>	X
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance			1
	to individuals located outside the United States? If "Yes," complete Schedule F, Parts III and IV	16	<u> </u>	<u> </u>
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services			_
	on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions)	17	<u> </u>	X
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on	1		1
	Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	18	<u> </u>	<u> </u>
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a?			
	If "Yes," complete Schedule G, Part III	19	1	X
	Did the organization operate one or more hospitals? If "Yes," complete Schedule H	20a		X
b	If "Yes" to line 20a, did the organization attach its audited financial statements to this return? Note. Some Form			1
	990 filers that operate one or more hospitals must attach audited financial statements (see instructions)	20b	<u> </u>	

Part	Checklist of Required Schedules (continued)	,		
•			Yes	No
21	Did the organization report more than \$5,000 of grants and other assistance to governments and organizations			
	in the United States on Part IX, column (A), line 17 If "Yes," complete Schedule I, Parts I and II	21		<u>X</u>
22	Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States	_	3,7	
	on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22	X	<u> </u>
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the			
	organization's current and former officers, directors, trustees, key employees, and highest compensated			
	employees? If "Yes," complete Schedule J	23		<u>X</u>
24 a	··· · · · · · · · · · · · · · · · ·			
	\$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b			
	through 24d and complete Schedule K. If No, go to line 25	24a		<u>X</u>
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		X
C	Did the organization maintain an escrow account other than a refunding escrow at any time during the year			
	to defease any tax-exempt bonds?	24c		<u>X</u>
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		<u>X</u>
25 a	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction			
	with a disqualified person during the year? If "Yes," complete Schedule L, Part I	25a		Х
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior			
	year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ?			
	If "Yes," complete Schedule L, Part I	25b		Х
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or			
_	disqualified person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II.	26		Х
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee,			
	substantial contributor, or a grant selection committee member, or to a person related to such an individual?			
	If "Yes," complete Schedule L, Part III	27		Х
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L,			
-0	Part IV instructions for applicable filing thresholds, conditions, and exceptions):	ŀ		
2	A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV	28a		Х
h	A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete			 -
	Schedule L, Part IV	28b		X
	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof)	200		
·	was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV	28c		_ x_
20	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29		X
29	Did the organization receive more than \$25,000 in non-cash contributions? It res, complete schedule in Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified			-
30		30		Х
24	conservation contributions? If "Yes," complete Schedule M	30	 	
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N,	31	İ	X
	Part I	31	-	
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes,"	22		v
	complete Schedule N, Part II	32		X
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations			,,
	sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I	33		<u>X</u>
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III,			١,,
	IV, and V, line 1	34		X
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)?	35		X
а	Did the organization receive any payment from or engage in any transaction with a			
	controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R,			
	Part V, line 2]
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable			
	related organization? If "Yes," complete Schedule R, Part V, line 2	36	<u> </u>	X
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization			
	and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R,			
	Part VI	37		X
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and		1	
	19? Note. All Form 990 filers are required to complete Schedule O	38		
		Earn	990	(2010)

Part	Check if Schedule O contains a response to any question in this Part V			
<u> </u>	Check it deficable o contains a response to any question in this rate vicinities.	· · · ·	Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable			
	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable			
	Did the organization comply with backup withholding rules for reportable payments to vendors and			
	reportable gaming (gambling) winnings to prize winners?	1c	Х	
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax			
	Statements, filed for the calendar year ending with or within the year covered by this return . 2a 0			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b		
	Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. (see instructions)			
За	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	_	X
	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O	3b		— —
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority			
	over, a financial account in a foreign country (such as a bank account, securities account, or other financial			v
	account)?	4a		X
D	If Yes, enter the name of the foreign country: ►			
E a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a		Х
	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		X
	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?	5c		
	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the			
	organization solicit any contributions that were not tax deductible?	6a		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or			ĺ
	gifts were not tax deductible?	6b		
7	Organizations that may receive deductible contributions under section 170(c).			
а	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods		· · · · ·	v
	and services provided to the payor?	7a 7b		X
	If "Yes," did the organization notify the donor of the value of the goods or services provided?	'6		
C	required to file Form 8282?	7c		X
d	If "Yes," indicate the number of Forms 8282 filed during the year			
е	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7е		Х
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f		X
	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g		X
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	1	X
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting		i	ļ
	organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring	8		Х
9	organization, have excess business holdings at any time during the year?	ů		A
a	Did the organization make any taxable distributions under section 4966?	9a		Х
b		9b		Х
10	Section 501(c)(7) organizations. Enter:		·	
а	Initiation fees and capital contributions included on Part VIII, line 12 10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities 10b			
11	Section 501(c)(12) organizations. Enter:			
	Gross income from members or shareholders	-		
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)			
120	against amounts due or received from them.)	12a		
	If "Yes," enter the amount of tax-exempt interest received or accrued during the year 12b			
13	Section 501(c)(29) qualified nonprofit health insurance issuers.			
	Is the organization licensed to issue qualified health plans in more than one state?	13a		
_	Note. See the instructions for additional information the organization must report on Schedule O.			
b	Enter the amount of reserves the organization is required to maintain by the states in which			
	the organization is licensed to issue qualified health plans			
	Enter the amount of reserves on hand		î	
	Did the organization receive any payments for indoor tanning services during the tax year?	14a		
h	If "Ves" has it filed a Form 720 to report these payments? If "No." provide an explanation in Schedule O	14b	1	1

Part.	Governance, Management, and Disclosure For each "Yes" response to lines 2 through 75 for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, o Schedule O. See instructions.	bel r cha	ow, a	and s in
	Check if Schedule O contains a response to any question in this Part VI			
Sect	ion A. Governing Body and Management			
			Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year 1a			
	Enter the number of voting members included in line 1a, above, who are independent 1b			-
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with	2		$\tilde{\mathbf{x}}$
3	· · · · · · · · · · · · · · · · · · ·			
-		cee, or key employee?		
4	any officer, director, trustee, or key employee have a family relationship or a business relationship with other officer, director, trustee, or key employee?			
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		<u>X</u>
6	Does the organization have members or stockholders?	6	X	<u> </u>
7a	Does the organization have members, stockholders, or other persons who may elect one or more members			
	of the governing body?	_7a	X	<u> </u>
b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	7b	<u>X</u>	<u> </u>
8	Did the organization contemporaneously document the meetings held or written actions undertaken during			
	the year by the following:	٥.	v	
а	The governing body?	8a	X	<u> </u>
b	Each committee with authority to act on behalf of the governing body?	8b	Δ.	<u> </u>
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9		l x
Sect	ion B. Policies (This Section B requests information about policies not required by the Internal Revenue		2.)	
<u> </u>	on b. I dides (This occiton b requests information about policies for required by the internal florenas		Yes	No
10a	Does the organization have local chapters, branches, or affiliates?	10a	Х	
	If "Yes," does the organization have written policies and procedures governing the activities of such chapters,			$\overline{}$
U	affiliates, and branches to ensure their operations are consistent with those of the organization?	10b		
11a				
	form?	11a	X	
ь	b Describe in Schedule O the process, if any, used by the organization to review this Form 990. 12a Does the organization have a written conflict of interest policy? If "No," go to line 13			
12a	· · · · · · · · · · · · · · · · · · ·	12a		X
		12b		<u> </u>
C	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes,"			
	describe in Schedule O how this is done			
13			ļ	X
14		14	Х	├
15				1
	independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		. v	
а	The organization's CEO, Executive Director, or top management official	15a	77	
b	Other officers or key employees of the organization	15b	^	├──
	If "Yes" to line 15a or 15b, describe the process in Schedule O. (See instructions.)			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement	16a		X
	with a taxable entity during the year?	100		
g	its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard			
	the organization's exempt status with respect to such arrangements?	16b		
Sect	tion C. Disclosure	1		
17	List the states with which a copy of this Form 990 is required to be filed Massachusetts			
18	Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s	only	·)	 ·
	available for public inspection. Indicate how you make these available. Check all that apply. Own website Another's website X Upon request			
19	Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of inte	rest		
	policy, and financial statements available to the public.			
20	State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ►MILFORD NATIONAL BANK TEL: 508244515			
	300 E. MAIN STREET; MILFORD, MA 01757-0228			

Part VII	Compensation of Officers,	Directors,	Trustees,	Key Employees,	Highest	Compensated	Employees,
•	and Independent Contract	ors					

Sectio	n A.	Officers.	Directors,	Trustees,	Κe	Employees	and Hig	ahest C	com	pensated	Emp	loyees

- 1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.
- List all of the organization's current officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
 - List all of the organization's current key employees, if any. See instructions for definition of "key employee."
- List the organization's five current highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's former officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's former directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

X Check this box it neither the organization no	r any related	organization compensated	any current offic	er, director, or trus	stee.
(A)	(B)	(C)	(D)	(E)	(F)
Name and Title	Average	Position (check all that apply)	Reportable	Reportable	Estimated
	hours per		compensation	compensation	amount of

(A)	(6)			(C	-1			(0)	(E)	(F)
Name and Title	Average hours per week (describe hours for related organizations in Schedule O)	Individual trustee	c Institutional trustee	Officer	Key employee	स्त्र Highest compensated क employee	Former	Reportable compensation from the organization (W-2/1099-MISC)	Reportable compensation from related organizations (W-2/1099-MISC)	Estimated amount of other compensation from the organization and related organizations
(1) Paul Coakley				Х				NONE	NONE NONE	<u>NON</u> E
(2) Robert Boyd				Х				NONE	NONE	NONE
(3) Carole David				Х				NONE	NONE	NONE
(4) Christine Hassan				Х				NONE	NONE	NONE
(5) Jane Killinger				Х				NONE	NONE	NONE
(6) Kathleen Tudryn				Х				NONE		NONE
(7) Thomas Fallon				х		-		NONE		NONE
(8) Lillian Taylor	-			Х				NONE		NONE
(9) Joseph Gilbert				Х				NONE		NONE
(10) Alex Nardacci Trustee				Х				NONE		NONE
(11) Anne Broder Trustee				х				NONI	NONE	NONE
(12) Eleanor Calvin Trustee				х				NONI	NONE	NONE
(13) Hugh Knox				Х				NONI	NONE	NONE
(14) John Hooper Trustee				Х				NONI	NONE	NONE
(15) Anne Demont Trustee		-		Х				NONI	NONE	NONE
(16) Barbara Sokolowski				x				NONI		NONE
		•			•	•				000 (000)

Part VII Section A. Officers, Directors, Tru	ıstees, Ke	y En	nplo	yee	es, a	and F	ligi	hest Compensate	ed Employees	continued)	1 ago O
. (A) Name and title	(B) Average	Posit	tion (c	-	C)	that app	nlv)	(D) Reportable	(E) Reportable	(F)	-
Hame and the	hours per week (describe hours for related organizations in Schedule O)	or director	trustee	Officer	Key employee	Highest compensated employee	Former	compensation from the organization (W-2/1099-MISC)	compensation from related organizations (W-2/1099-MISC)	amour oth compen from organiz and rei	nt of er issation the zation lated
(17) Loretta L. Frissora				Х				NONE	NONE		NONE
(18) Margaret Bilodeau Trustee				Х				NONE	NONE		NONE
(19) Robert Nelson Trustee				Х				NONE	NONE		NON!
(20) Justine McComiskey Substitute	-			Х				NONE	NONE	,	NONE
(21)	-										
(22)											
(23)											
(24)											
(25)											
(26)	-										
(27)	-										
(28)	-										
1b Sub-total	ection ${\sf A}$.						> > >	NONI	NON	1E	NONI
Total number of individuals (including but not reportable compensation from the organization)	limited to t						o re				
3 Did the organization list any former offi employee on line 1a? If "Yes," complete Sched										3	es No X
4 For any individual listed on line 1a, is the the organization and related organizations individual.	greater t	han S	\$15C	0,00	0?	If "Y	es,	" complete Sched	ule J for such	4	i i
5 Did any person listed on line 1a receive or for services rendered to the organization? If ")										5	X
Section B. Independent Contractors											
1 Complete this table for your five highest compensation from the organization.	compensa	ted i	ndep	oend	den	t con	trac	tors that received	d more than \$1	00,000 o	f
(A) Name and business add	dress							(B) Description of se	rvices	(C) Compensati	on
							+				
							‡				
2 Total number of independent contractors (i				nite	d t			listed above) who	received		
more than \$100,000 in compensation from the	ne organiza						0			O	20

Total revenue Section Total revenue Total revenue Related or exempt function Related or exempt function revenue Related or exempt function revenue Related or exempt function revenue	revenue u	(D) Revenue scluded from tax under sections 12, 513, or 514
Business Code Total. Add lines 1a-1f Total. Add lines 2a-2f Investment income (including dividends, interest, and other smular amounts). Total. Add lines 2a-2f Investment income or (loss) Royaltes Royaltes Royaltes Royaltes Royaltes Royaltes Ross amount from sales of assets other than inventory Less: cost or other basis and sales expenses		
Business Code Business Code		
Business Code Business Code		
3 Investment income (including dividends, interest, and other similar amounts)		
3 Investment income (including dividends, interest, and other similar amounts)		
3 Investment income (including dividends, interest, and other similar amounts)		
3 Investment income (including dividends, interest, and other similar amounts)		
3 Investment income (including dividends, interest, and other similar amounts)		
3 Investment income (including dividends, interest, and other similar amounts)		22.24
3 Investment income (including dividends, interest, and other similar amounts)		
other similar amounts)		00.045
4 Income from investment of tax-exempt bond proceeds	-	20,847
5 Royalties		
6a Gross Rents		
b Less: rental expenses c Rental income or (loss)		
c Rental income or (loss)		
d Net rental income or (loss)		
7a Gross amount from sales of assets other than inventory b Less: cost or other basis and sales expenses c Gain or (loss)		
7a Gross amount from sales of assets other than inventory b Less: cost or other basis and sales expenses c Gain or (loss)		
b Less: cost or other basis and sales expenses		Į
and sales expenses		
d Net gain or (loss)		
•		
th Se Green uncome from fundraising		
8a Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18 a b Less: direct expenses b c Net income or (loss) from fundraising events		
b Less: direct expenses b		
c Net income or (loss) from fundraising events		
9a Gross income from gaming activities. See Part IV, line 19		
b Less, direct expenses b		
c Net income or (loss) from gaming activities		
10a Gross sales of inventory, less returns and allowances a b Less. cost of goods sold b		
c Net income or (loss) from sales of inventory		
Miscellaneous Revenue Business Code		
11a		
b		
d All other revenue 518.	+	518
518		
12 Total revenue, See instructions		21,36

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

	All other organizations must comple	·			
	not include amounts reported on lines 6b, , 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to governments and				
	organizations in the U.S. See Part IV, line 21				
2	Grants and other assistance to individuals in				
	the U.S. See Part IV, line 22	8,360.	8,360.		
3	Grants and other assistance to governments,				
	organizations, and individuals outside the				
	U.S. See Part IV, lines 15 and 16				
4	Benefits paid to or for members	9,642.	9,642.		
5	Compensation of current officers, directors,		<u></u>		
	trustees, and key employees			j	
6	Compensation not included above, to disqualified				
•	persons (as defined under section 4958(f)(1)) and				
	persons described in section 4958(c)(3)(B)			ł	
7	Other salaries and wages				
8	Pension plan contributions (include section 401(k)				
•	and section 403(b) employer contributions)				
9	Other employee benefits				
10	Payroll taxes				
11	Fees for services (non-employees).				
		7,686.		7,686.	
	Management	7,000.		7,000.	
	Legal	690.		690.	-
	Accounting			0,000	
	Lobbying				
	Professional fundraising services See Part IV, line 17				
	Investment management fees	35.	35.		
	Other				
12	Advertising and promotion	2,294.	1,464.	505.	325
13	Office expenses	<u> </u>	1,304.		
14	Information technology				
15	Royalties	4,825.		4,825.	
16	Occupancy	1,773.		1,773.	
17	Travel	1,1,13			
18	Payments of travel or entertainment expenses				
	for any federal, state, or local public officials				
19	Conferences, conventions, and meetings				
20	Interest				
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	250	250		
23	Insurance	250.	250.		
24	Other expenses Itemize expenses not covered				
	above (List miscellaneous expenses in line 24f. If				
	line 24f amount exceeds 10% of line 25, column (A) amount, list line 24f expenses on Schedule O)]			
	· · · · · · · · · · · · · · · · · · ·				
a					
þ					
¢					
d					
9					
	All other expenses		10 551	15 150	
	Total functional expenses Add lines 1 through 24f	35,555	19,751.	15,479.	325
26	Joint Costs. Check here	}	1		
	SOP 98-2 (ASC 958-720). Complete this line only if the organization reported in column				
	(B) joint costs from a combined educational				
	campaign and fundraising solicitation				

Part X		(A) Beginning of year		(B) End of year
1	Cook and industrial		1	
1	Cash - non-interest-bearing	4,188. 421,108.	2	3,571 295,523
2	Savings and temporary cash investments	421,100.	3	293,323
3	Pledges and grants receivable, net		4	
4	Accounts receivable, net		 * -	· · · · · · · · · · · · · · · · · · ·
5	Receivables from current and former officers, directors, trustees, key			
	employees, and highest compensated employees. Complete Part II of		_	
	Schedule L		5	
6	Receivables from other disqualified persons (as defined under section 4958(f)(1)), persons			
i	described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of	÷		
ام	section 501(c)(9) voluntary employees' beneficiary organizations (see instructions)		6	
[7	Notes and loans receivable, net		7	
Assets 8	Inventories for sale or use		8	
9	Prepaid expenses and deferred charges		9	
10a	Land, buildings, and equipment: cost or			
	other basis. Complete Part VI of Schedule D 10a			
b	Less: accumulated depreciation		10c	
11	Investments - publicly traded securities	<u>377,356.</u>	11	534,866
12	Investments - other securities. See Part IV, line 11		12	
13	Investments - program-related. See Part IV, line 11		13	
14	Intangible assets		14	<u> </u>
15	Other assets. See Part IV, line 11		15	
16	Total assets. Add lines 1 through 15 (must equal line 34)	802,652.	16	833 <u>,960</u>
17	Accounts payable and accrued expenses		17	
18	Grants payable		18	
19	Deferred revenue		19	
20	Tax-exempt bond liabilities		20	
_ω 21	Escrow or custodial account liability. Complete Part IV of Schedule D		21	
₽ 22	Payables to current and former officers, directors, trustees, key			
Liabilities 22	employees, highest compensated employees, and disqualified persons.			
دّ	Complete Part II of Schedule L		22	
23	Secured mortgages and notes payable to unrelated third parties		23	
24	Unsecured notes and loans payable to unrelated third parties		24	
25	Other liabilities. Complete Part X of Schedule D		25	
26	Total liabilities. Add lines 17 through 25	NONE	26	NON
	Organizations that follow SFAS 117, check here ▶ and complete lines 27 through 29, and lines 33 and 34.			
27	Unrestricted net assets		27	-
<u>e</u> 28	Temporarily restricted net assets	 	28	
B 29	Permanently restricted net assets		29	<u> </u>
or Fund Balances	Organizations that do not follow SFAS 117, check here ► X and complete lines 30 through 34.			
	Capital stock or trust principal, or current funds		30	
9 31	Paid-in or capital surplus, or land, building, or equipment fund		31	_
۲ ع	Retained earnings, endowment, accumulated income, or other funds	802,652.	+	833,960
33	Total net assets or fund balances	802,652.		833,960
34	Total liabilities and net assets/fund balances	802,652.	34	833,960

Form **990** (2010)

required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.

3b

SCHEDULE A (Form 990 or 990-EZ)

Public Charity Status and Public Support

2010

OMB No 1545-0047

Open to Public

Department of the Treasury Internal Revenue Service Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

Open to Publi Inspection

		ne organization							Employ			n number		
ED:	[TH	STEWART CHASE	FOUNDATION	- AGENCY					İ	04-3	<u> 2423</u>	44		
Par	t l	Reason for Publi	ic Charity Status	(All organizations mus	st com	plete	this pa	art.) Se	e instru	ctions.				
The	orga	nization is not a priva	ate foundation beca	ause it is: (For lines 1 thro	ough 1	1, ched	ck only	one bo	x.)					
1		A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).												
2		A school described in section 170(b)(1)(A)(ii). (Attach Schedule E.)												
3	A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii).													
4	A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the							er the						
		hospital's name, city, and state:												
5			·	nefit of a college or univ	ersity (owned	or ope	erated b	oy a gov	/ernmei	ntal u	nit describ	ed in	
		section 170(b)(1)(A		-	·		•							
6			·	or governmental unit desc	ribed i	n secti	ion 170)(b)(1)(A	A)(v).					
7	Н	An organization that normally receives a substantial part of its support from a governmental unit or from the general pul									public			
	لـــا	=	on 170(b)(1)(A)(vi). (Complete Part II.)											
8	\Box			n 170(b)(1)(A)(vi). (Com	olete F	art II.)								
9	Н	· · · · · · · · · · · · · · · · · · ·		s: (1) more than 331/3%	-			contrib	utions.	membe	rship	fees, and	aross	
_		=		exempt functions - subj									_	
		-		ome and unrelated busing										
		· · ·		e 30, 1975. See section							,			
10	\Box			ed exclusively to test for			•							
11	$\overline{\mathbf{x}}$		•	ated exclusively for the							or to	carry or	it the	
• •	<u> </u>	_	_	pported organizations de										
		•	•	es the type of supporting										
		a X Type I	b Type				ally inte			d [7	: : III - Othei	r	
е				the organization is not				_	irectly I		J ''			
_		, -	•	gers and other than one						•		-		
		509(a)(1) or section		9		•	•	•	Ū					
f				n determination from the	e IRS	that it	is a T	ype I, T	ype II,	or Type	e III s	upporting		
		organization, check	Abia bass					, ,		- /.		., .		
g				nization accepted any gift			on from	n any of	the					
J		following persons?	, J	, ,				•						
			directly or indire	ctly controls, either alor	alone or together with persons described in (ii) Yes No									
		•		-	he supported organization? 11g(i)							11g(i)	X	
				cribed in (i) above?								11g(ii)	X	
				on described in (i) or (ii) a								X		
h			· · · · · · · · · · · · · · · · · · ·	ut the supported organiza).								
	(i) N	ame of supported	(iii) Type of organization	organization in the		in col. (i) of		1 '''		(v	(vii) Amount of support			
		organization	(described on lines 1-9 above or IRC section (see instructions))											
				i	Yes	No	Yes	No	Yes	No				
				·····										
(A)	SI	rmt 1					}		1					
/D\														
(B)														
(0)														
(C)							<u> </u>					_		
(D)]					
					ļ									
(E)														
					<u> </u>		<u> </u>		ļ					
_														
Tota			L		<u> </u>		L	<u> </u>					_,	
		work Reduction Act N or 990-EZ.	otice, see the instru	ctions for					Scf	iedule A (rorm 9	90 or 990-E	Z) 2010	

Part₂II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi) (Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Sect	ion A. Public Support	<u> </u>			<u>, </u>		N/A		
	dar year (or fiscal year beginning in)	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total		
1	Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")								
2	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf								
3	The value of services or facilities furnished by a governmental unit to the organization without charge								
4	Total. Add lines 1 through 3								
5	The portion of total contributions by each) F	i r				
	person (other than a governmental unit or publicly supported organization) included			ļi r	: 1	; 1			
	on line 1 that exceeds 2% of the amount shown on line 11, column (f)		1	ι - -					
6	Public support. Subtract line 5 from line 4.] 				
	ion B. Total Support		/	·		<i></i>			
Caler	dar year (or fiscal year beginning in)	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total		
7	Amounts from line 4								
8	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources								
9	Net income from unrelated business activities, whether or not the business is regularly carried on								
10	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)								
11	Total support. Add lines 7 through 10		IL	<u> </u>	<u></u>	12	<u> </u>		
12	Gross receipts from related activities, etc. (s					12	504(-)(0)		
13 Sec	First five years. If the Form 990 is f organization, check this box and stop here tion C. Computation of Public Sup	<u> </u>							
14	Public support percentage for 2010 (li			11. column (f))	14	_ %_		
15	Public support percentage from 2009						%		
	331/3% support test - 2010. If the co								
	this box and stop here. The organization								
b	331/3% support test - 2009. If the								
	check this box and stop here. The org								
17a	10%-facts-and-circumstances test - 2								
	or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here . Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported								
	_						4 1		
_	organization								
D	15 is 10% or more, and if the organic	anization meet	s the "facts-and	d-circumstances	" test, check t	this box and s	top here.		
	Explain in Part IV how the organization supported organization				_				
18	Private foundation. If the organization	on did not che	ck a box on lin	e 13, 16a, 16	b, 17a, or 17b,	check this box	k and see		
	instructions	<u> </u>	· · · · · · · · · · · ·	<u> </u>	<u> </u>	• • • • • • •	· · · · · · <u> </u>		

Support Schedule for Organizations Described in Section 509(a)(2)
(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II.

If the organization fails to qualify under the tests listed below, please complete Part II.)

Sect	ion A. Public Support	anny under the	tests listed by	olow, picase e	ompiete i dit i	···,	N/A
	endar year (or fiscal year beginning in)	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
1	Gifts, grants, contributions, and membership fees				· - · · · · · · · · · · · · · · · · · 	 	
•	received (Do not include any "unusual grants.")	:			•		
2	Gross receipts from admissions, merchandise	-					
	sold or services performed, or facilities						
	furnished in any activity that is related to the						
	organization's tax-exempt purpose						
3	Gross receipts from activities that are not an						
•	unrelated trade or business under section 513						
4	Tax revenues levied for the organization's						
•	benefit and either paid to or expended on						
	its behalf						
5	The value of services or facilities						
_	furnished by a governmental unit to the						
	organization without charge						
6	Total. Add lines 1 through 5						
	Amounts included on lines 1, 2, and 3						
	received from disqualified persons						
b	Amounts included on lines 2 and 3						
	received from other than disqualified persons that exceed the greater of						
	persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
С	Add lines 7a and 7b						
8	Public support (Subtract line 7c from						
	line 6)	<u> </u>	<u> </u>		<u> </u>	<u></u>	
<u>Sect</u>	tion B. Total Support						
Ca	alendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
9	Amounts from line 6						
10a	Gross income from interest, dividends, payments received on securities loans,						
	rents, royalties and income from similar sources						
ь	Unrelated business taxable income (less						
_	section 511 taxes) from businesses						
	acquired after June 30, 1975						
c	Add lines 10a and 10b						
11	Net income from unrelated business						
	activities not included in line 10b,						1
	whether or not the business is regularly						
12	Other income. Do not include gain or						
	loss from the sale of capital assets		1	ĺ	1		1
	(Explain in Part IV.)					<u> </u>	
13	Total support. (Add lines 9, 10c, 11,						
	and 12.)	<u> </u>	<u> </u>	1		l	
14	First five years. If the Form 990 is for	•			•		
	organization, check this box and stop here				<u> </u>	• • • • • • • • •	▶ _
	tion C. Computation of Public Sup	,				T .= 1	
15	Public support percentage for 2010 (line 8,					15	
16	Public support percentage from 2009 Sche			<u> </u>		16	%
	tion D. Computation of Investmen				 -	T 42	
17	Investment income percentage for 2010 (li						
18	Investment income percentage from 2009					18	<u>%</u>
198	331/3% support tests - 2010. If the or						
	17 is not more than 331/3%, check th						
Þ	331/3% support tests - 2009. If the organization 19 is not more than 321/3% shock						
20	line 18 is not more than 331/3%, check						
20	Private foundation. If the organization	ulu ilot check	a DUX ON TINE	1→, 19a, Of 19		Schedule A /Form 9	

SCHEDULE 1 (Form 990)

Governments, and Individuals in the United States Grants and Other Assistance to Organizations,

OMB No. 1545-0047	2010

Schedule I (Form 990) (2010) ž (h) Purpose of grant or assistance Open to Public Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Part Inspection **Employer** identification number Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to 04-3242344 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and (g) Description of non-cash assistance (f) Method of valuation (book, FMV, appraisal, other) Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22. (d) Amount of cash grant (e) Amount of non-cash assistance ► Attach to Form 990. (c) IRC section if applicable Enter total number of section 501(c)(3) and government organizations For Paperwork Reduction Act Notice, see the Instructions for Form 990. - AGENCY Il can be duplicated if additional space is needed Enter total number of other organizations General Information on Grants and Assistance (P) EIN STEWART CHASE FOUNDATION (a) Name and address of organization or government Department of the Treasury Name of the organization Internal Revenue Service Part 1 Part II E [2] <u>ල</u> -(4) <u>(</u>2) **(**9) [2] (8) 6 100 (11) (12) ~

0E1288 2 000

74

SCHEDULĖ O (Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ

OMB No. 1545-0047

Form 990 or 990-EZ or to provide any additional information. Department of the Treasury Internal Revenue Service ▶ Attach to Form 990 or 990-EZ. Name of the organization

Complete to provide information for responses to specific questions on Open to Public Inspection Employer identification number

EDITH STEWART CHASE FOUNDATION - AGENCY	04-3242344
EXPLANATION FOR FORM 990, PART XI, LINE 5	
01/04/2011 ISHARES S&P US PFD \$130.85 + \$1,316.54 Accrued int	erest +
\$4.61 rounding	
	
	

SCHEDULE A, PART I (h) - INFORMATION ABOUT SUPPORTED ORGANIZATIONS

NAME OF SUPPORTED ORGANIZATION:

REAM

EIN: 04-2428942

TYPE OF ORGANIZATION FROM PART I: 501(c)3

IS THE ORGANIZATION LISTED IN GOVERNING DOCUMENT?: YES

DID YOU NOTIFY THE ORGANIZATION OF YOUR SUPPORT?: YES

IS THE ORGANIZATION ORGANIZED IN THE U.S.?: YES

TOTAL SUPPORT:

18,002.

==========