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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 01-01-2010 , and ending 12-31-2010

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
THE IVES FAMILY CHARITABLE TRUST
C/O LORING WOLCOTT COOLIDGE TRUST LLC

Number and street (or P O box number if mail is not delivered to street address) Room/suite
230 CONGRESS STREET

City or town, state, and ZIP code
BOSTON, MA 02110

A Employer identification number
04-6644020

B Telephone number (see page 10 of the instructions)
(617) 523-6531

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) ☒ \$ 2,970,148

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))		(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	48	48		
	4 Dividends and interest from securities.	56,124	56,608		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	55,256			
	b Gross sales price for all assets on line 6a _____ 546,874				
	7 Capital gain net income (from Part IV, line 2)		55,256		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	111,428	111,912		
	13 Compensation of officers, directors, trustees, etc	5,529	5,529		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	☒ 4,582	2,707		1,875
	c Other professional fees (attach schedule)	☒ 4,003	4,003		0
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	☒ 1,919	1,095		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	☒ 65	30		35
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	16,098	13,364		1,910
	25 Contributions, gifts, grants paid	83,505			83,505
	26 Total expenses and disbursements. Add lines 24 and 25	99,603	13,364		85,415
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	11,825			
	b Net investment income (if negative, enter -0-)		98,548		
	c Adjusted net income (if negative, enter -0-)				

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	1Cash—non-interest-bearing	721	273	273
	2Savings and temporary cash investments	216,354	97,888	97,888
	3Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5Grants receivable			
	6Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8Inventories for sale or use			
	9Prepaid expenses and deferred charges			
	10aInvestments—U S and state government obligations (attach schedule)			
	bInvestments—corporate stock (attach schedule)	2,175,171	2,155,910	2,614,622
	cInvestments—corporate bonds (attach schedule).	0	150,000	150,981
	11Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12Investments—mortgage loans			
	13Investments—other (attach schedule)	110,036	110,036	106,384
	14Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15Other assets (describe ▶ _____)			
	16Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,502,282	2,514,107	2,970,148
Liabilities	17Accounts payable and accrued expenses			
	18Grants payable			
	19Deferred revenue			
	20Loans from officers, directors, trustees, and other disqualified persons			
	21Mortgages and other notes payable (attach schedule)			
	22Other liabilities (describe ▶ _____)			
	23Total 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.			
	24Unrestricted			
	25Temporarily restricted			
	26Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27Capital stock, trust principal, or current funds	2,582,118	2,582,118	
	28Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29Retained earnings, accumulated income, endowment, or other funds	-79,836	-68,011	
	30Total net assets or fund balances (see page 17 of the instructions)	2,502,282	2,514,107	
	31Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,502,282	2,514,107	

Part III

Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	2,502,282
2	Enter amount from Part I, line 27a	2	11,825
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	2,514,107
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,514,107

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)
1 a	PUBLICLY TRADED SECURITIES			
b	PUBLICLY TRADED SECURITIES			
c	CAPITAL GAINS DIVIDENDS	P		
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 113,716		93,153	20,563
b 433,074		398,465	34,609
c 84			84
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			20,563
b			34,609
c			84
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	55,256
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	

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	32,245	2,361,935	0 013652
2008	80,555	2,910,420	0 027678
2007	90,210	3,310,848	0 027247
2006	83,060	3,020,844	0 027496
2005	71,770	2,898,923	0 024757

2	Total of line 1, column (d).	2	0 120830
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 024166
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5.	4	2,745,329
5	Multiply line 4 by line 3.	5	66,344
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	985
7	Add lines 5 and 6.	7	67,329
8	Enter qualifying distributions from Part XII, line 4. If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18	8	85,415

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)			
1aExempt 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)			
bDomestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	985
cAll other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3Add lines 1 and 2.		3	985
4Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	985
6Credits/Payments			
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	841
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	
7Total credits and payments Add lines 6a through 6d.		7	841
8Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	144
10Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	
11Enter the amount of line 10 to be Credited to 2011 estimated tax ☒ Refunded ☐		11	

Part VII-AStatements Regarding Activities			
1aDuring 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?			YesNo
bDid it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			NoNo
cDid the foundation file Form 1120-POL for this year?.		1c	No
dEnter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☒ \$ 0 (2) On foundation managers ☒ \$ 0			
eEnter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0			
2Has 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	No
3Has 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	No
4aDid the foundation have unrelated business gross income of \$1,000 or more during the year?.		4a	No
bIf "Yes," has it filed a tax return on Form 990-T for this year?.		4b	
5Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		5	No
6Are 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	Yes
7Did 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	Yes
8aEnter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ☒ MA			
bIf 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	Yes
9Is 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	No
10Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10	No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of LORING WOLCOTT COOLIDGE TRUST LLC Telephone no (617) 523-6531 Located at 230 CONGRESS STREET BOSTON MA ZIP+4 02110			
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.			
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?	15		
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.		16		No

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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
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?	1c		No
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? 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 20 of the instructions).	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?			
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.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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)? Organizations relying on a current notice regarding disaster assistance check here.	☐	5b	
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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>	☐ Yes ☐ No		
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? <i>If "Yes" to 6b, file Form 8870.</i>		6b	No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see 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
GILBERT M RODDY JR 230 CONGRESS STREET BOSTON, MA 02110	TRUSTEE 1 00	5,529	0	0
J ATWOOD IVES 17 WEST CEDAR STREET BOSTON, MA 02108	TRUSTEE 1 00	0	0	0
ELIZABETH S IVES 17 WEST CEDAR STREET BOSTON, MA 02108	TRUSTEE 1 00	0	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

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.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
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	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	0

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	2,628,979
b	Average of monthly cash balances.	1b	158,157
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,787,136
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	2,787,136
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	41,807
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,745,329
6	Minimum investment return. Enter 5% of line 5.	6	137,266

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	137,266
2a	Tax on investment income for 2010 from Part VI, line 5.	2a	985
b	Income tax for 2010 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	985
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	136,281
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	136,281
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	136,281

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	85,415
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	85,415
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	985
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	84,430
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see 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			
2	Undistributed income, if any, as of the end of 2010			
a	Enter amount for 2009 only. 0			
b	Total for prior years 20____, 20____, 20____ 0			
3	Excess distributions carryover, if any, to 2010			
a	From 2005.			
b	From 2006.			
c	From 2007.			
d	From 2008.			
e	From 2009.			
f	Total of lines 3a through e. 0			
4	Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 85,415			
a	Applied to 2009, but not more than line 2a 0			
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions) 0			
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). . . 0			
d	Applied to 2010 distributable amount. 85,415			
e	Remaining amount distributed out of corpus 0			
5	Excess distributions carryover applied to 2010 0			
(If an amount appears in column (d), the same amount must be shown in column (a).)				
6	Enter the net total of each column as indicated below:			
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5 0			
b	Prior years' undistributed income Subtract line 4b from line 2b. 0			
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. 0			
d	Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . . 0			
e	Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions 0			
f	Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011. 50,866			
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). 0			
8	Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions). 0			
9	Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a. 0			
10	Analysis of line 9			
a	Excess from 2006.			
b	Excess from 2007.			
c	Excess from 2008.			
d	Excess from 2009.			
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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 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))

See Additional Data Table

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

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

J ATWOOD IVES
17 WEST CEDAR STREET
BOSTON, MA 02108
(617) 227-6655

b

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

WRITTEN FORM INDICATING AMOUNTS REQUESTED AND PROJECTED USE

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

NONE

Form 990-PF (2010)

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			▶ 3a	83,505
b Approved for future payment				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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	48	
4 Dividends and interest from securities. . . .			14	56,124	
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.					
8 Gain or (loss) from sales of assets other than inventory			18	55,256	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). .		0		111,428	0
13 Total. Add line 12, columns (b), (d), and (e). 13					111,428

[illegible]

Part XVII

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

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.

2

Other assets.

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

2

Purchases of assets from a noncharitable exempt organization.

3

Rental of facilities, equipment, or other assets.

4

Reimbursement arrangements.

5

Loans or loan guarantees.

6

Performance of services or membership or fundraising solicitations.

c

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

d

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

(a)	(b)	(c)	(d)
Line No	Amount involved	Name of noncharitable exempt organization	Description of transfers, transactions, and sharing arrangements

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)	(b)	(c)
Name of organization	Type of organization	Description of relationship

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

2011-05-06

Date

Title

Paid Preparer's Use Only

Preparer's Signature

Preparer's name

Firm's address

MICHAEL STEINBERG

LORING WOLCOTT & COOLIDGE TRUST LLC

230 CONGRESS STREET

BOSTON, MA 021102437

Date

Firm's EIN

Phone no

2011-05-06

(617) 523-6531

Check if self-employed

PTIN

☒

Form 990-PF (2010)

Additional Data

Software ID:
Software Version:
EIN: 04-6644020
Name: THE IVES FAMILY CHARITABLE TRUST
C/O LORING WOLCOTT COOLIDGE TRUST LLC

Form 990PF Part XV Line 1a - 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).

J ATWOOD IVES
ELIZABETH S IVES

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
BC CARROLL SCHOOL ASSOCIATION PROGRAM 140 COMMONWEALTH AVENUE CHESTNUT HILL, MA 02467	NONE	PUBLIC CHARITY	GENERAL PURPOSES	750
BEACON HILL CIVIC ASSOCIATION CHARITABLE TRUST 74 JOY STREET BOSTON, MA 02114	NONE	PUBLIC CHARITY	GENERAL PURPOSES	1,000
BEACON HILL SEMINARS 127 MOUNT VERNON STREET BOSTON, MA 02108	NONE	PUBLIC CHARITY	GENERAL PURPOSES	500
BEACON HILL VILLAGE 74 JOY STREET BOSTON, MA 02114	NONE	PUBLIC CHARITY	GENERAL PURPOSES	5,000
BOSTON ATHENAEUM 10 1/2 BEACON STREET BOSTON, MA 02108	NONE	PUBLIC CHARITY	GENERAL PURPOSES	500
BOSTON HARBOR ISLAND ALLIANCE 408 ATLANTIC AVE BOSTON, MA 02110	NONE	PUBLIC CHARITY	GENERAL PURPOSES	250
CAPE COD HEALTHCARE FOUNDATION 348 GIFFORD STREET FALMOUTH, MA 02540	NONE	PUBLIC CHARITY	GENERAL PURPOSES	500
COALITION FOR BUZZARDS BAY 620 BELLEVILLE AVENUE NEW BEDFORD, MA 02745	NONE	PUBLIC CHARITY	GENERAL PURPOSES	1,000
CONCORD LAND CONSERVATION TRUST PO BOX 141 CONCORD, MA 01742	NONE	PUBLIC CHARITY	GENERAL PURPOSES	2,000
CONNECTICUT COLLEGE 270 MOHEGAN AVE NEW LONDON, CT 06320	NONE	PUBLIC CHARITY	GENERAL PURPOSES	1,000
EMERALD NECKLACE CONSERVANCY 891 CENTRE STREET JAMAICA PLAIN, MA 02130	NONE	PUBLIC CHARITY	GENERAL PURPOSES	250
FAMILY TO FAMILY PROJECT 14 BEACON STREET BOSTON, MA 02108	NONE	PUBLIC CHARITY	GENERAL PURPOSES	500
FREELANCE PLAYERS 670 CENTRE STREET JAMAICA PLAIN, MA 02130	NONE	PUBLIC CHARITY	GENERAL PURPOSES	250
FRIENDS OF MOUNT AUBURN CEMETARY 580 MOUNT AUBURN STREET CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	GENERAL PURPOSES	250
GROTON SCHOOL 282 FARMERS ROW GROTON, MA 01450	NONE	PUBLIC CHARITY	GENERAL PURPOSES	1,000
Total  3a				83,505

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
HERITAGE MUSEUM & GARDENS 67 GROVE STREET SANDWICH,MA 02563	NONE	PUBLIC CHARITY	GENERAL PURPOSES	250
HILL HOUSE 127 MOUNT VERNON STREET BOSTON,MA 02108	NONE	PUBLIC CHARITY	GENERAL PURPOSES	250
JINGO FOUNDATION 230 CONGRESS STREET BOSTON,MA 02110	NONE	PRIVATE FOUNDATION	GENERAL PURPOSES - SEE ATTACHED FOOTNOTE	20,000
JUDD FOUNDATION 104 SOUTH HIGHLAND AVENUE MARFA,TX 79843	NONE	PUBLIC CHARITY	GENERAL PURPOSES	500
MASS AUDUBON SOCIETY 208 SOUTH GREAT ROAD LINCOLN,MA 01773	NONE	PUBLIC CHARITY	GENERAL PURPOSES	955
NEW ENGLAND AQUARIAM 177 MILK STREET BOSTON,MA 02110	NONE	PUBLIC CHARITY	GENERAL PURPOSES	10,000
NEW ENGLAND CONSERVATORY 290 HUNTINGTON AVENUE BOSTON,MA 02115	NONE	PUBLIC CHARITY	GENERAL PURPOSES	5,000
NORTH BENNET STREET SCHOOL 39 NORTH BENNET STREET BOSTON,MA 02113	NONE	PUBLIC CHARITY	GENERAL PURPOSES	250
PARTNERS IN HEALTH 888 COMMONWEALTH AVENUE BOSTON,MA 02215	NONE	PUBLIC CHARITY	GENERAL PURPOSES	10,000
PINE STREET INN 444 HARRISON AVENUE BOSTON,MA 02118	NONE	PUBLIC CHARITY	GENERAL PURPOSES	500
PLANNED PARENTHOOD 1055 COMMONWEALTH AVENUE BOSTON,MA 02115	NONE	PUBLIC CHARITY	GENERAL PURPOSES	250
PROJECT BREAD 145 BORDER STREET EAST BOSTON,MA 02128	NONE	PUBLIC CHARITY	GENERAL PURPOSES	250
ROGERSON COMMUNITIES ONE FLORENCE STREET ROSLINDALE,MA 02131	NONE	PUBLIC CHARITY	GENERAL PURPOSES	500
SCHOOL OF THE MUSEUM OF FINE ARTS 230 FENWAY BOSTON,MA 02115	NONE	PUBLIC CHARITY	GENERAL PURPOSES	3,000
SMILE TRAIN 41 MADISON AVENUE NEW YORK,NY 10010	NONE	PUBLIC CHARITY	GENERAL PURPOSES	250
Total  3a				83,505

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE MACDOWELL COLONY 100 HIGH STREET PETERBOROUGH,NH 03458	NONE	PUBLIC CHARITY	GENERAL PURPOSES	500
WBUR 890 COMMONWEALTH AVE BOSTON,MA 02215	NONE	PUBLIC CHARITY	GENERAL PURPOSES	1,200
WOODS HOLE RESEARCH CENTER 149 WOODS HOLE ROAD FALMOUTH,MA 02540	NONE	PUBLIC CHARITY	GENERAL PURPOSES	10,000
YALE UNIVERSITY YALE UNIVERSITY NEW HAVEN,CT 06520	NONE	PUBLIC CHARITY	GENERAL PURPOSES	5,100
Total  3a				83,505

TY 2010 Accounting Fees Schedule**Name:** THE IVES FAMILY CHARITABLE TRUST

C/O LORING WOLCOTT COOLIDGE TRUST LLC

EIN: 04-6644020

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION	1,875	0		1,875
LORING, WOLCOTT & COOLIDGE TRUST, LLC	2,707	2,707		0

TY 2010 General Explanation Attachment**Name:** THE IVES FAMILY CHARITABLE TRUST

C/O LORING WOLCOTT COOLIDGE TRUST LLC

EIN: 04-6644020

Identifier	Return Reference	Explanation
		PART XV, SUPPLEMENTARY INFORMATION, LINE 3A GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR OR APPROVED FOR FUTURE PAYMENT TO FACILITATE GRANT ADMINISTRATION, THE IVES FAMILY CHARITABLE TRUST MADE A \$20,000 GRANT TO THE JINGO FOUNDATION ON DECEMBER 7, 2010 THIS GRANT WAS REDISTRIBUTED UNDER 4942(G)(3) TO THE FOLLOWING CHARITY ON DECEMBER 7, 2010 RECIPIENT FRIENDS OF LINCOLN COMMUNITY SCHOOL (VERMONT) FOUNDATION STATUS PUBLIC CHARITY PURPOSE GENERAL PURPOSES AMOUNT \$20,000
		990PF STATEMENT PART VIII OFFICERS, DIRECTORS, TRUSTEES, FOUNDATION MANAGERS AND THEIR COMPENSATION AND HOURS SPENT PER WEEK HOURS SPENT THE TIME SPENT BY THE TRUSTEE/S MANAGING THE AFFAIRS OF THE FOUNDATION VARIES FROM WEEK TO WEEK AND YEAR TO YEAR FOR 990PF REPORTING PURPOSES, AN ESTIMATE OF 1 TO 1.5 HOURS PER WEEK HAS BEEN INDICATED THE TRUSTEE/S ARE PROFESSIONAL FIDUCIARIES WHO MANAGE A NUMBER OF TRUST/FOUNDATION RELATIONSHIPS AND WHO EMPLOY ACCOUNTING, SUPPORT AND TAX COMPLIANCE STAFF TO ASSIST WITH THE ADMINISTRATION OF SAID RELATIONSHIPS THE 1 TO 1.5 HOUR TIME NOTED REFLECTS AN ESTIMATE OF THE TIME SPENT BY THE NAMED TRUSTEE/S AS WELL AS THEIR AGENTS OR EMPLOYEES THE ACTUAL TIME SPENT MAY DIFFER FROM THE ESTIMATE IN ANY GIVEN WEEK/YEAR

**TY 2010 Investments Corporate
Bonds Schedule**

Name: THE IVES FAMILY CHARITABLE TRUST
C/O LORING WOLCOTT COOLIDGE TRUST LLC
EIN: 04-6644020

Name of Bond	End of Year Book Value	End of Year Fair Market Value
14018.692 VANGUARD SHORT-TERM INVESTMENT GRADE ADM	150,000	150,981

**TY 2010 Investments Corporate
Stock Schedule**

Name: THE IVES FAMILY CHARITABLE TRUST
C/O LORING WOLCOTT COOLIDGE TRUST LLC
EIN: 04-6644020

Name of Stock	End of Year Book Value	End of Year Fair Market Value
775 ABBOTT LABORATORIES	40,486	37,130
1900 AUTOMATIC DATA PROCESSING	89,217	87,932
1100 BERKSHIRE HATHAWAY INC B SHARES	77,903	88,121
1300 CHURCH & DWIGHT CO	75,397	89,726
1075 COLGATE PALMOLIVE CO	85,416	86,398
625 CREE INC	30,843	41,181
1375 DANAHER CORP SHS BEN INT	58,549	64,859
1525 DENTSPLY INTERNATIONAL	33,832	52,109
1700 EXXON MOBIL CORP	99,575	124,304
800 FISERV INC	40,236	46,848
700 ILLINOIS TOOL WORKS	40,500	37,380
800 JOHNSON & JOHNSON	35,323	49,480
3375 LINEAR TECHNOLOGY CORP	116,673	116,741
350 MASTERCARD INC	73,495	78,439
850 MCDONALDS CORP	49,660	65,246
2075 MEDTRONIC INC	78,533	76,962
1000 OCCIDENTAL PETROLEUM CORP	35,925	98,100
2900 PAYCHEX INC	101,622	89,639
1600 PEPSICO INC	76,105	104,528
1675 QUALCOMM INC	51,160	82,896
1725 STAPLES INC	42,725	39,278
1725 STATE STREET CORP	83,219	79,937
1750 STRYKER CORP	48,959	93,975
1100 UNITED TECHNOLOGIES	71,070	86,592
2275 ABB LTD	60,136	51,074
775 BHP BILLITON PLC-ADR	49,763	62,388
750 CANADIAN NATIONAL RAILWAY	40,271	49,853
750 DIAGEO PLC SPONSORED ADR	63,276	55,748
1450 ENCANA CORP	37,632	42,224
2187 NESTLE SA SPONS ADR FOR REG	69,698	128,460

Name of Stock	End of Year Book Value	End of Year Fair Market Value
2200 SUNCOR ENERGY INC NEW	42,919	84,238
3675 DAIRY FARM INTL HOLDINGS LTD	30,300	34,141
1375 JARDINE MATHESON HOLDINGS LTD	41,145	60,500
1550 RECKITT BENCKISER GROUP PLC	80,731	85,544
2575 STANDARD CHARTERED PLC	31,578	69,565
1675 HEINEKEN HOLDING NV	72,038	73,086

TY 2010 Investments - Other Schedule

Name: THE IVES FAMILY CHARITABLE TRUST

C/O LORING WOLCOTT COOLIDGE TRUST LLC

EIN: 04-6644020

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
2979.113 DODGE & COX INTERNATIONAL STOCK FUND	AT COST	110,036	106,384

TY 2010 Other Expenses Schedule

Name: THE IVES FAMILY CHARITABLE TRUST

C/O LORING WOLCOTT COOLIDGE TRUST LLC

EIN: 04-6644020

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ANNUAL REPORT FORM PC FEE	35	0		35
AGENT FEES	30	30		0

TY 2010 Other Professional Fees Schedule**Name:** THE IVES FAMILY CHARITABLE TRUST

C/O LORING WOLCOTT COOLIDGE TRUST LLC

EIN: 04-6644020

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LWC FIDUCIARY ADVISORS	4,003	4,003		0

TY 2010 Taxes Schedule**Name:** THE IVES FAMILY CHARITABLE TRUST

C/O LORING WOLCOTT COOLIDGE TRUST LLC

EIN: 04-6644020

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	1,095	1,095		0
FEDERAL EXCISE TAXES	824	0		0